

Leave Management System User Manual (HR)



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Leave Management System (LMS) Module

Introduction

This document form part of several manuals that were published as user's guide to effectively use the TalentOz. Leave Management System (LMS) Module User Manual is intended as a complete guide for all employees and privileged users whose works are related to LMS Module. This Module automates the HR administrative tasks of recording leave and controlling these against leave policies defined in the HR system. The module provides flexibility in allowing HR administrative to define various Leave types, Leave period, Holidays, Carry Forward and Leave Accrual.

This manual serves as a starter's guide for each employee to be familiarized with the basic and frequently used TalentOZ functionalities. It is a must for new users and newly hired employees to read this manual in order to immediately access pertinent information.

Users need not to be technically knowledgeable to use the TalentOz. The least minimum requirement is for user to be able to comprehend what is written in this manual and the ability to correlate the instructions with the actual system. It is preferable to read this manual while the user is logged-in to the system in order to clearly grasp the idea or instruction and see the TalentOZ in action.

Audience of the document

This document is intended as a complete guide for HR administrative, Supervisors and normal employees. By reading this guide, you will learn how to use through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of.

Module overview

This module maintains all relevant information related to **Leave Management System (LMS)**, including leave settings configuration, leave application and leave approval process.

The functionality of the Module differs depending on the rights of the user.

HR Administrative can:

- Manage Leave Types
- Configure Leave Period



- Configure Company Holiday
- Manage Accrual Settings
- Manage Carry Forward Settings

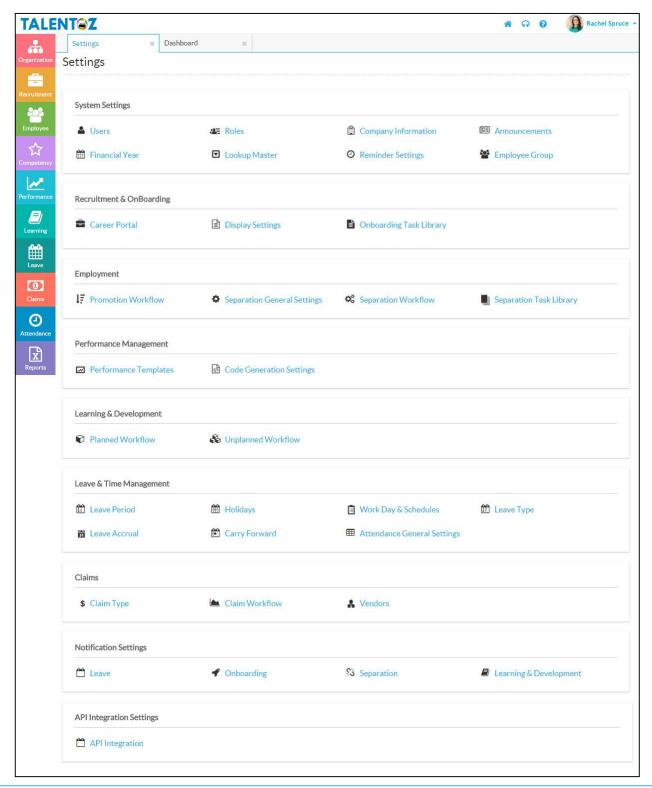


Administrator Leave Management

Configure Holiday

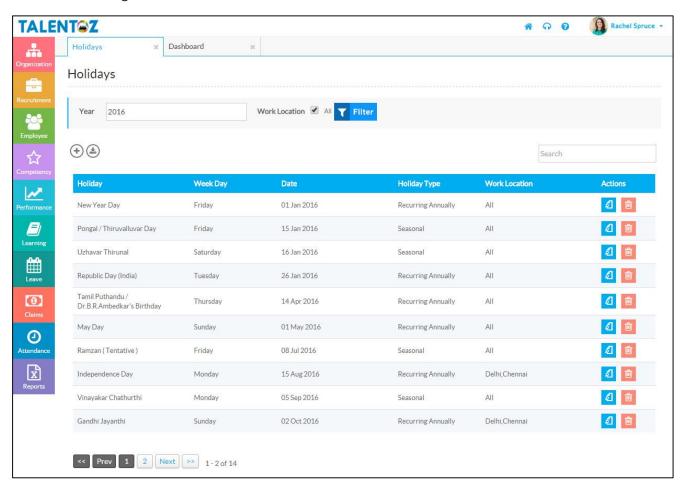
Add Holiday

To Add Holiday, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.

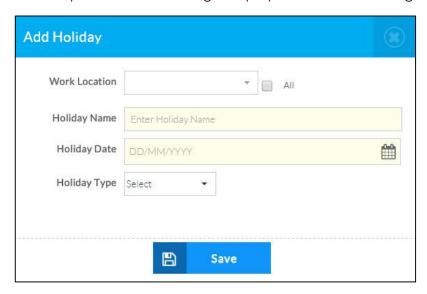




Click on the **Holidays** option in the **Leve & Time Management** section, Holiday page will get displayed as shown in the figure.



Click on 🕀 icon, Add holiday modal window will get displayed as shown in the figure.



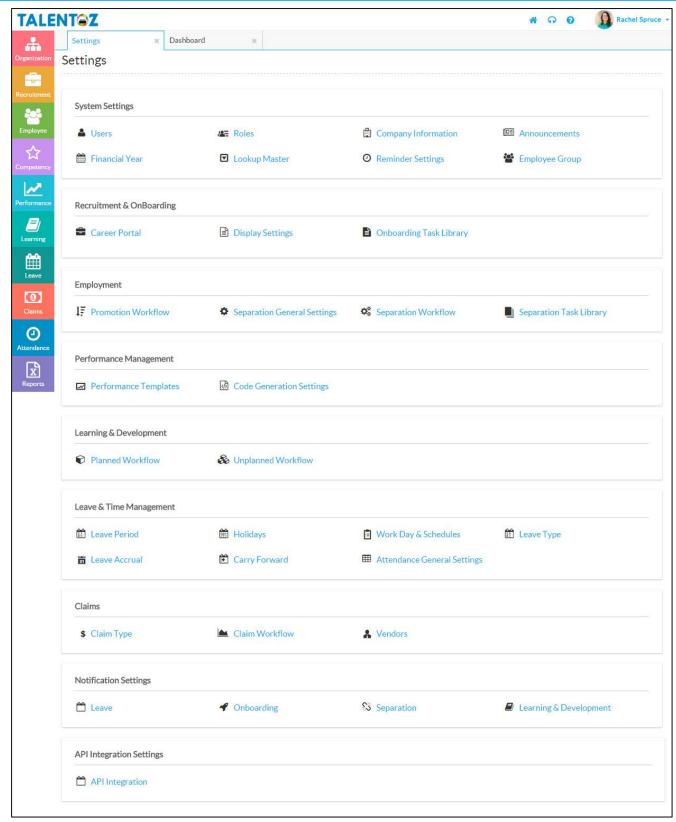
Enter the required details and click on button. Holiday gets saved to the system.



Edit Holiday

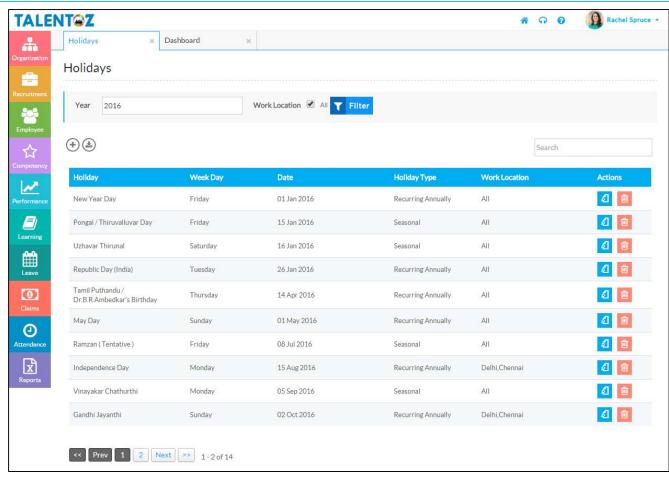
To edit holidays, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.



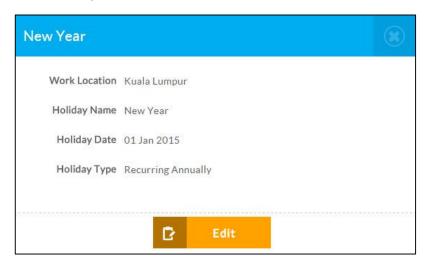


Click on the Holidays option in the Leve & Time Management section, Holiday page will get displayed as shown in the figure.



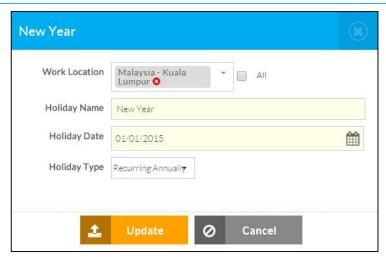


Click on the View icon adjacent to the respective holiday record, corresponding holiday details will get displayed as shown in the figure.



Click on button, holiday details will get displayed in edit mode as shown in the figure.

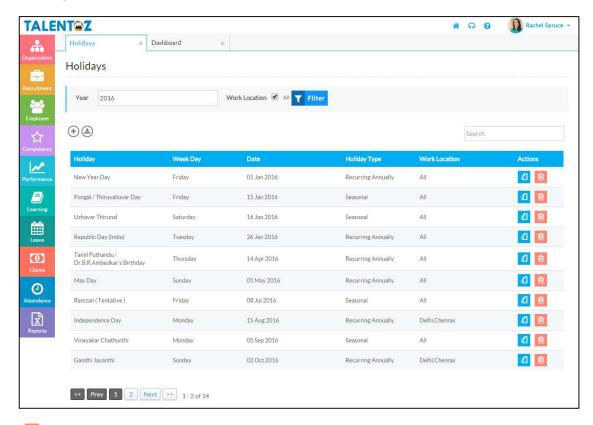




Modify the necessary details and click on button. Modified details gets saved to the system.

Delete Holiday

To delete holiday navigate to **Settings > Leave Settings > Holidays**. Holiday page will get displayed as shown in the figure.



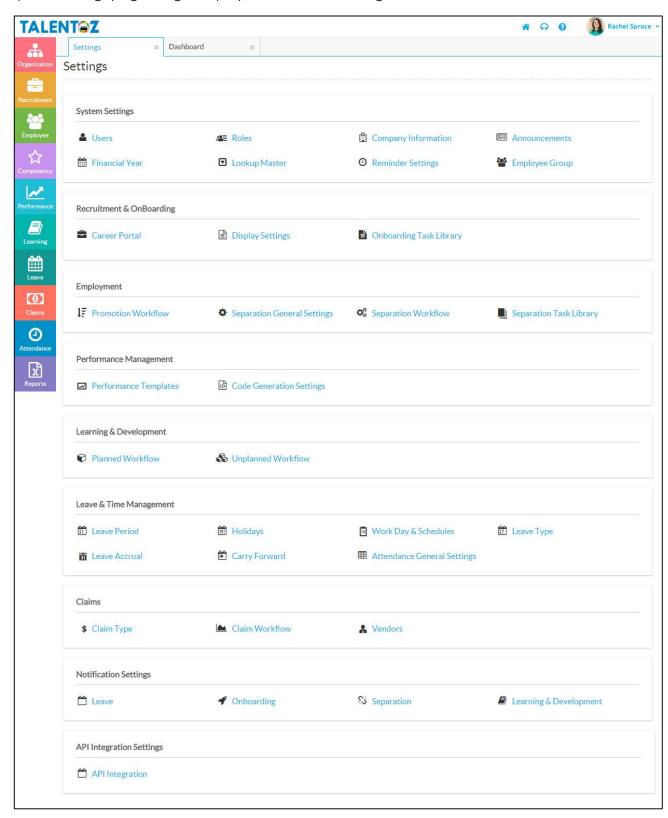
Click on confirmation available in the respective holiday item. Confirmation message will get displayed, on confirmation corresponding holiday will get deleted.



Configure Leave Period

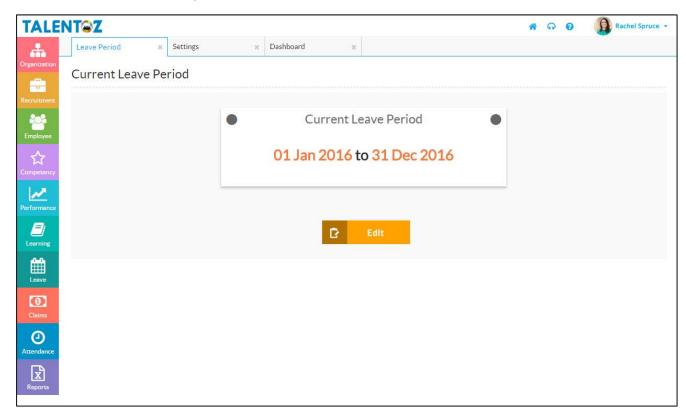
Add New Leave Period

To add new leave period, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.





Click on the **Leave Period** option in the **Leve & Time Management** section. Leave Period page will get displayed as shown in the figure.



Click on button, leave period details will get displayed in edit mode as shown in the figure.



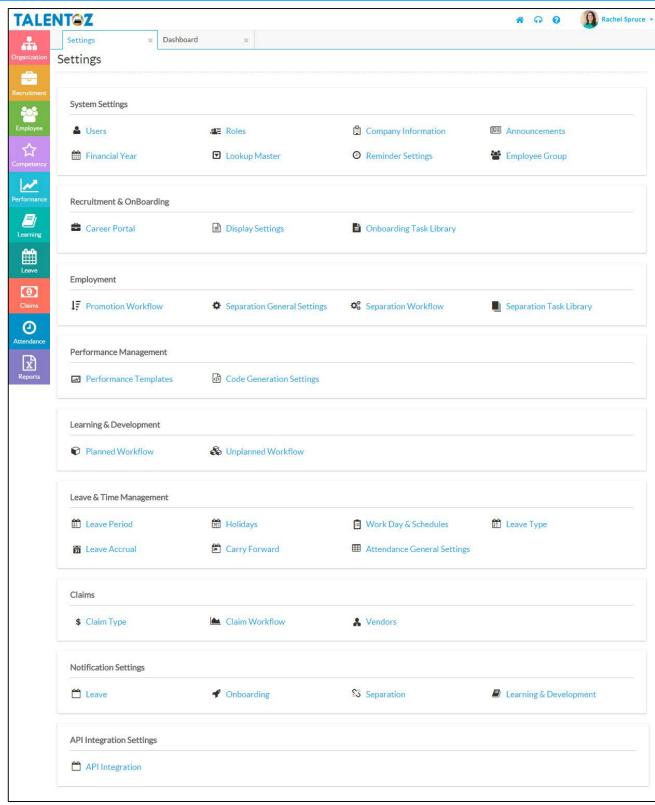
Enter the required details and click on Save button.

Configure Leave Type

Add New Leave Type

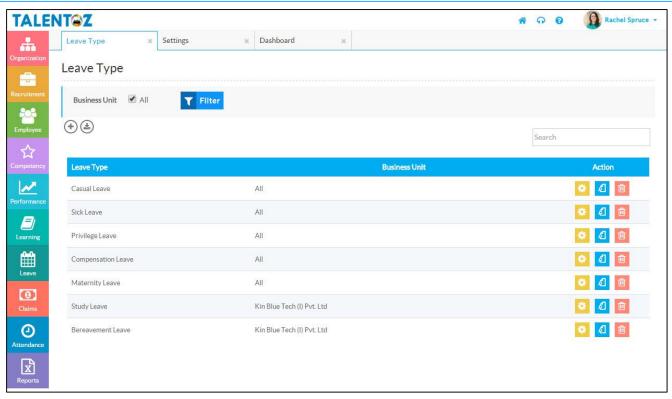
To add new leave type, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.



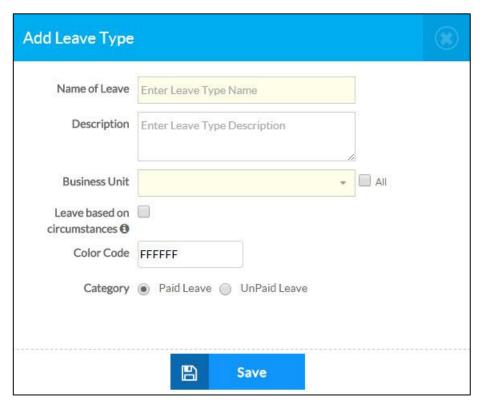


Click on the **Leave Type** option in the **Leve & Time Management** section. Leave Type page will get displayed as shown in the figure.





Click on \odot icon, Add leave Type modal window will get displayed as shown in the figure.

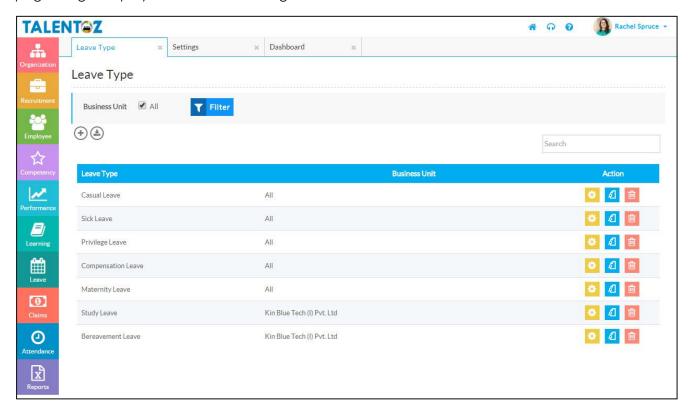


Enter the required details and click on Save button.



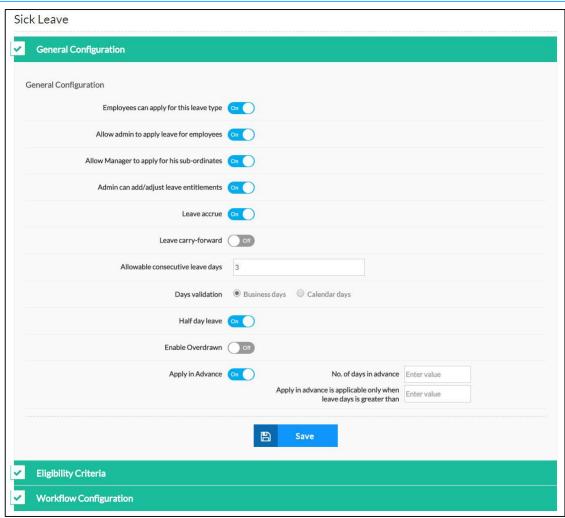
Manage Leave Type Settings

To manage leave type settings navigate to **Settings > Leave Settings > Leave Type**. Leave Type list page will get displayed as shown in the figure.



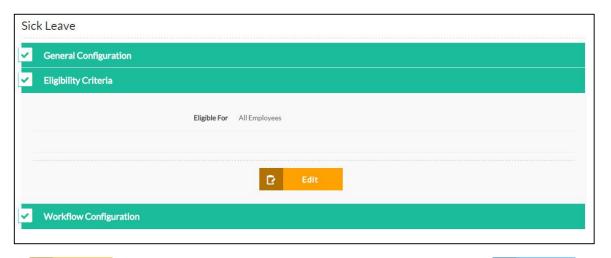
Click on icon available in the respective leave type. Corresponding leave type's configuration details will get displayed as shown in the figure.





Configure the general settings details and click on Save button.

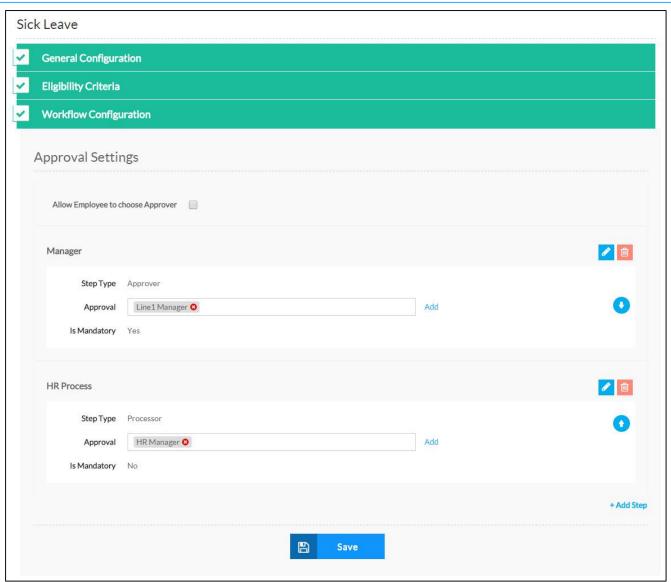
After configuring the general settings, click on the Eligible Criteria to expand.



Click on button, configure the eligibility criteria details and click on button.

After configuring eligibility criteria, click on the Workflow Configuration to expand.



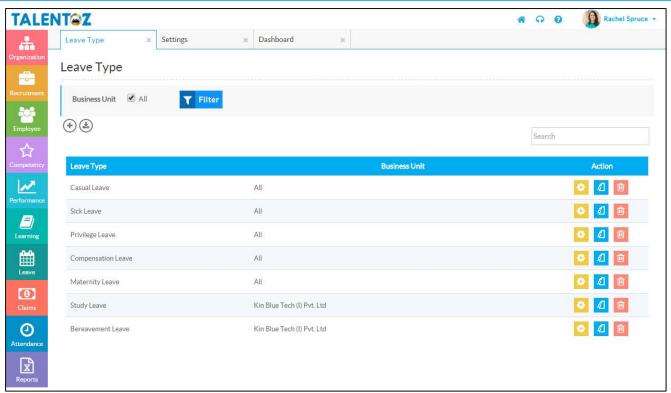


Configure the workflow configuration details and click on button.

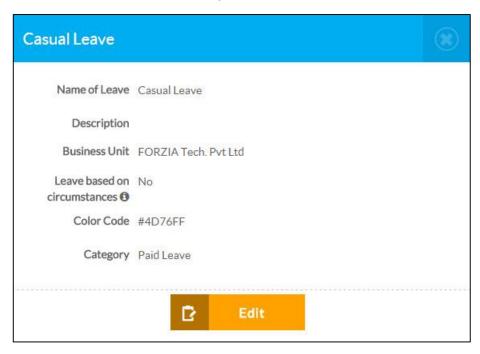
Modify Leave Type

To modify leave type navigate to **Settings > Leave Settings > Leave Type**. Leave Type list page will get displayed as shown in the figure.



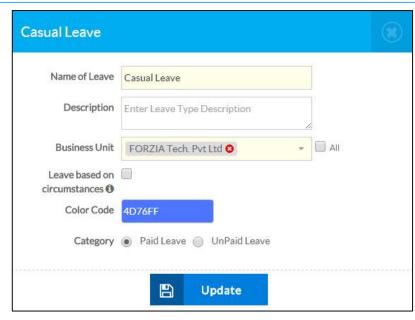


Click on icon available in the respective leave type. Corresponding leave type's details will get displayed in a modal window as shown in the figure.



Click on button, details gets displayed in editable mode as shown in the figure.

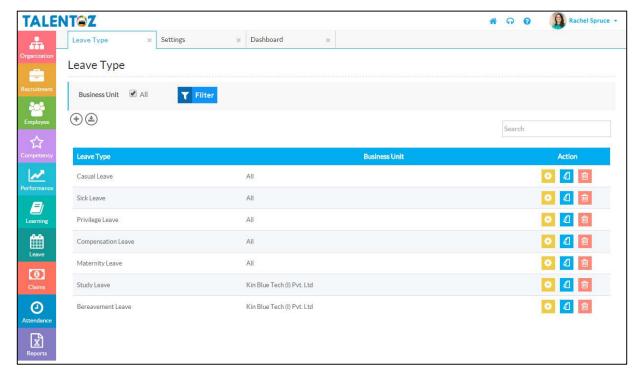




Modify the required details and click on Update button.

Delete Leave Type

To delete leave type navigate to **Settings > Leave Settings > Leave Type**. Leave Type list page will get displayed as shown in the figure.



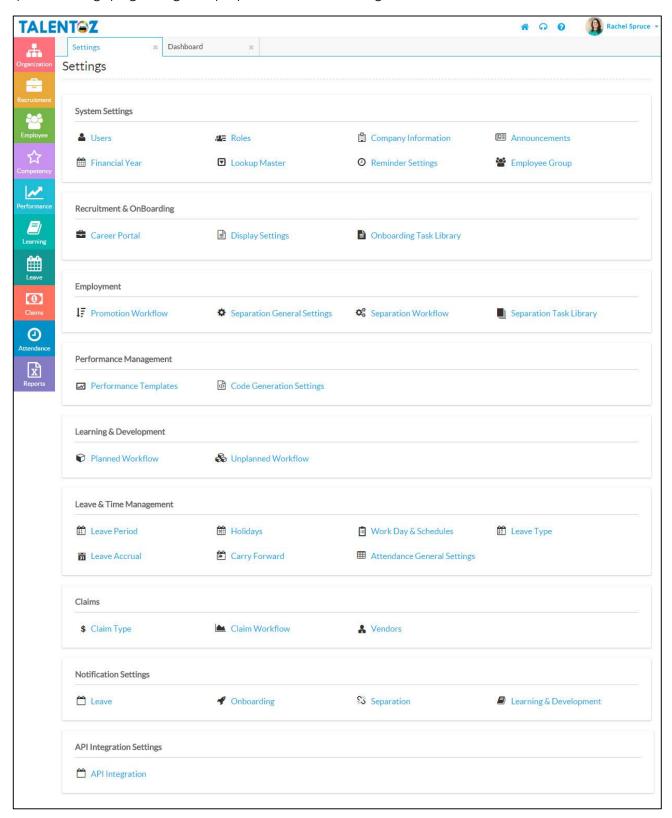
Click on icon available in the respective leave type. Confirmation message will get displayed, on confirmation corresponding leave type will get deleted.



Carry Forward

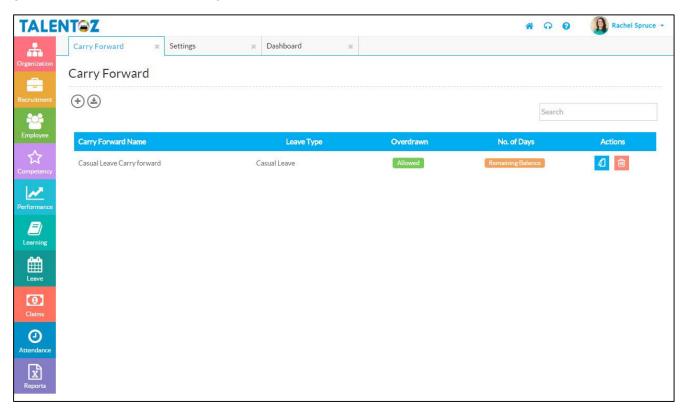
Add Carry Forward

To add carry forward, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.

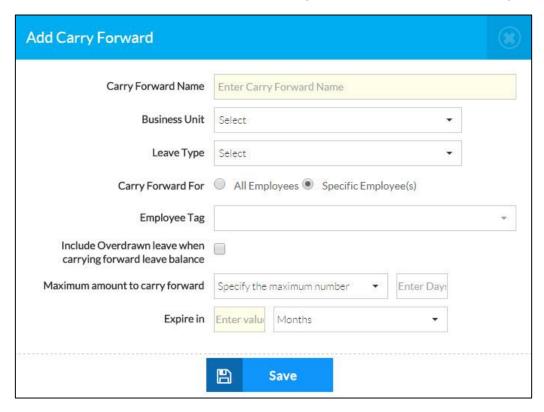




Click on the Carry Forward option in the Leve & Time Management section. Carry Forward page will get displayed as shown in the figure.



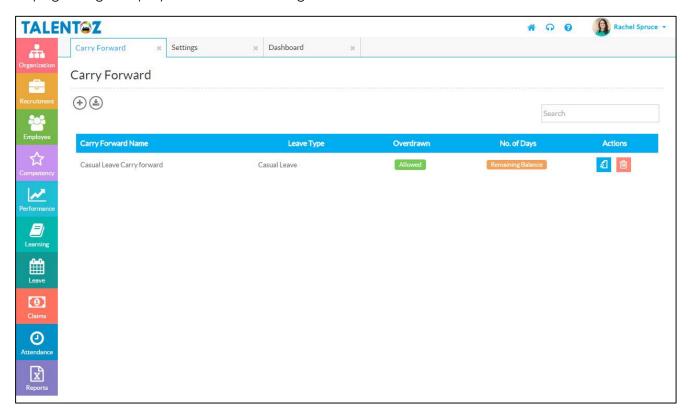
Click on \odot icon, Add Carry Forward modal window will get displayed as shown in the figure.



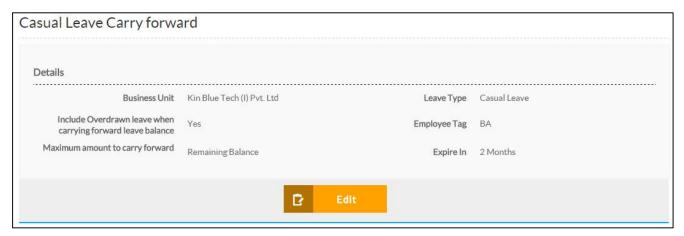


Modify Carry Forward

To modify carry forward details navigate to **Settings > Leave Settings > Carry Forward**. Carry forward list page will get displayed as shown in the figure.

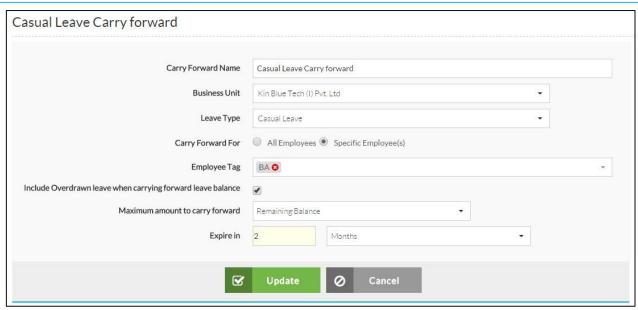


Click on discontained in the respective carry forward item. Corresponding carry forward details will get displayed as shown in the figure.



Click on button, details gets displayed in editable mode as shown in the figure.

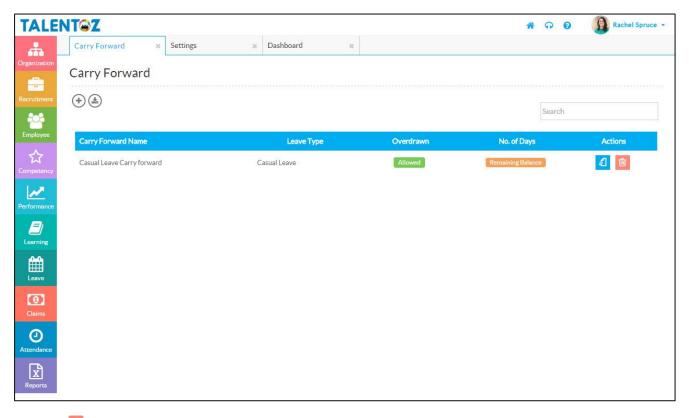




Modify the required details and click on Update button.

Delete Carry Forward

To delete carry forward details navigate to Settings > Leave Settings > Carry Forward. Carry forward list page will get displayed as shown in the figure.



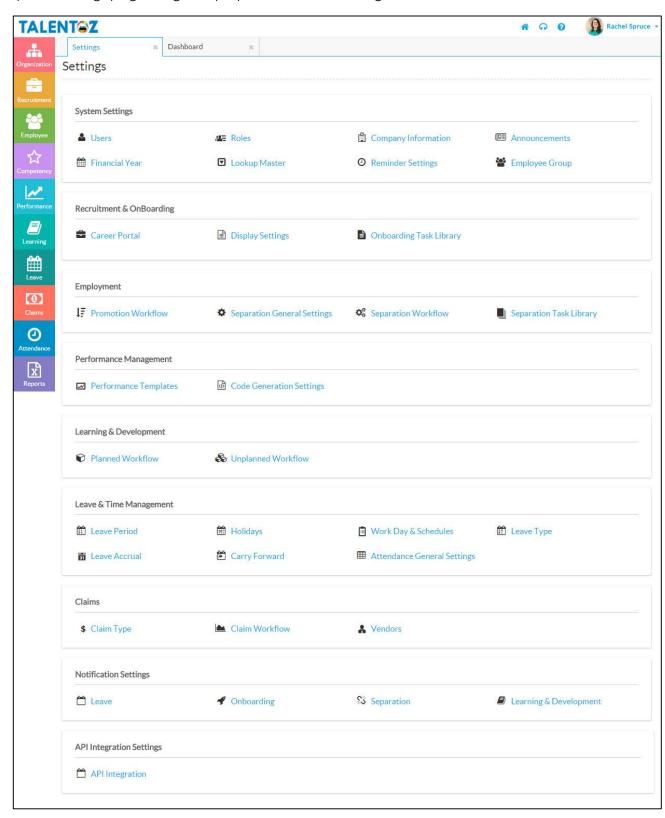
Click on icon available in the respective carry forward record. Confirmation message will get displayed, on confirmation corresponding carry forward will get deleted.



Leave Accrual

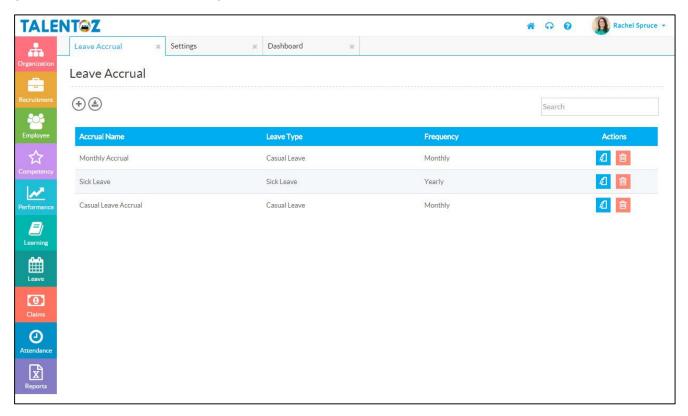
Add Leave Accrual

To add leave accrual, click on the name in the top right corner of the screen and select Settings option. Settings page will get displayed as shown in the figure.

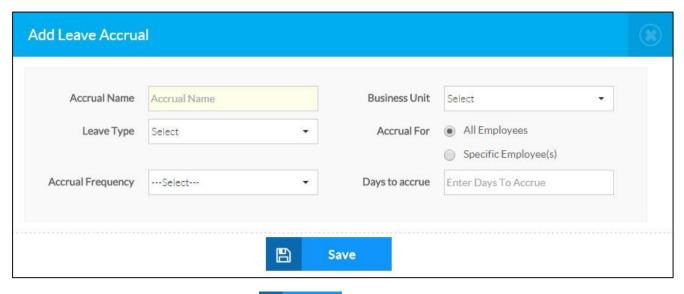




Click on the Leave Accrual option in the Leve & Time Management section. Leave Accrual page will get displayed as shown in the figure.



Click on $^{\scriptsize\textcircled{+}}$ icon, Add Leave Accrual modal window will get displayed as shown in the figure.

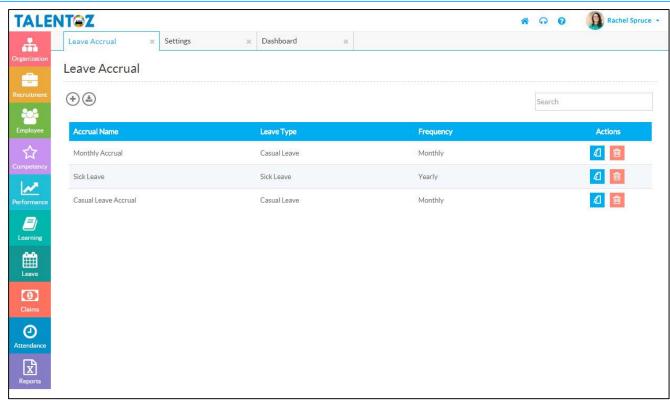


Enter the required details and click on Save button.

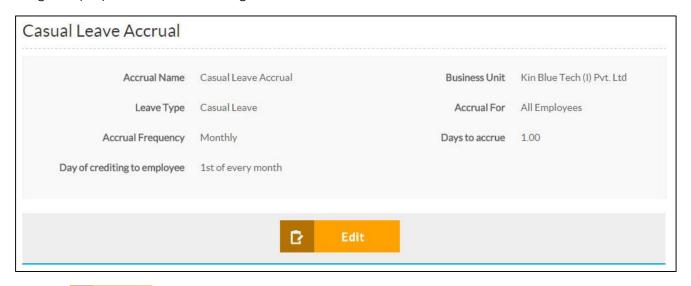
Modify Leave Accrual

To modify leave accrual details navigate to **Settings > Leave Settings > Leave Accrual**. Leave Accrual list page will get displayed as shown in the figure.



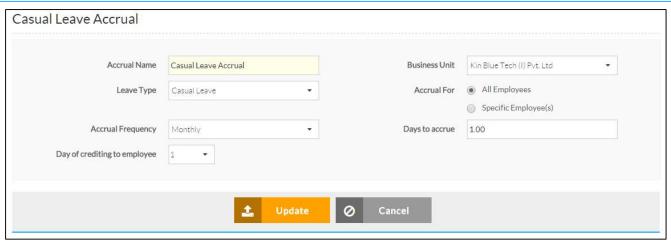


Click on dicon available in the respective leave accrual item. Corresponding carry forward details will get displayed as shown in the figure.



Click on button, details gets displayed in editable mode as shown in the figure.

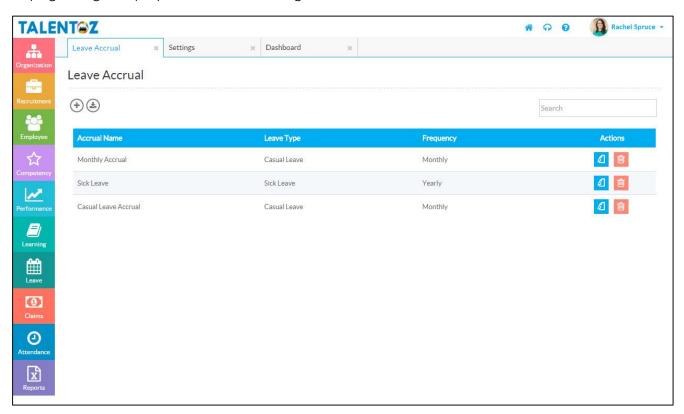




Modify the required details and click on Update button.

Delete Leave Accrual

To delete carry forward details navigate to Settings > Leave Settings > Leave Accrual. Leave Accrual list page will get displayed as shown in the figure.

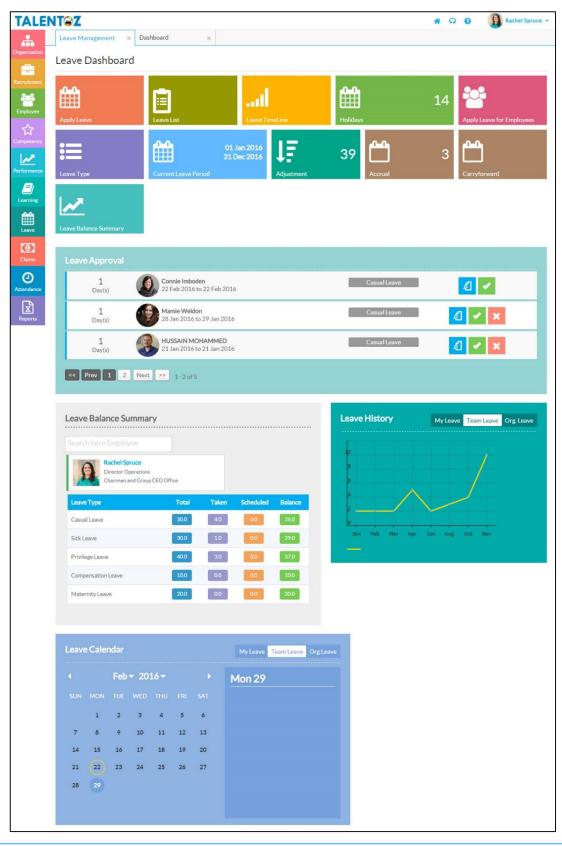


Click on icon available in the respective leave accrual record. Confirmation message will get displayed, on confirmation corresponding leave accrual will get deleted.



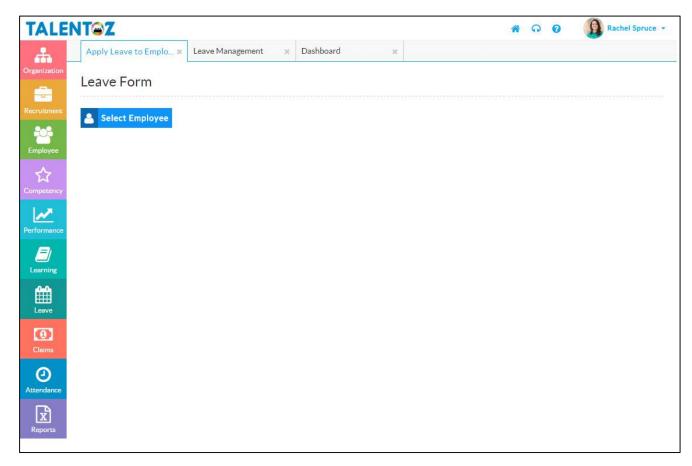
Apply Leave for an Employee

To apply leave for an employee, click on the Leave Management menu. Leave management dashboard page will get as shown in the figure.



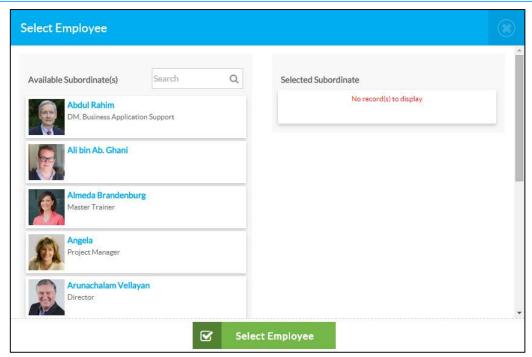


Click on the Apply Leave for Employees tile available in the leave dashboard. Leave Form will get displayed as shown in the figure.

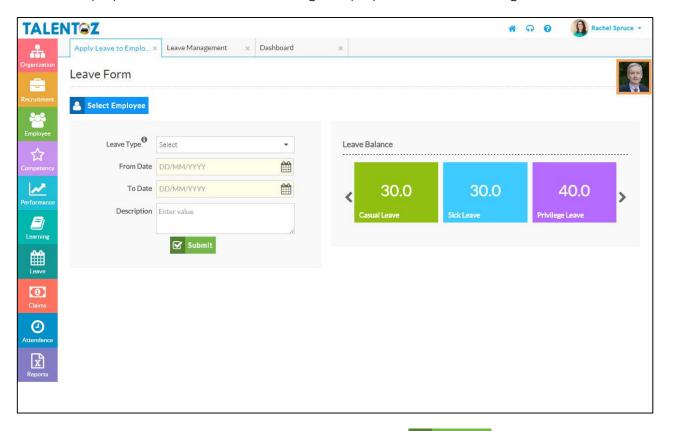


Click on Select Employee button, assign employee modal window will get displayed as shown in the figure.





Select the employee to whom you need to apply leave and click on Form with employee leave balance details will get displayed as shown in the figure.

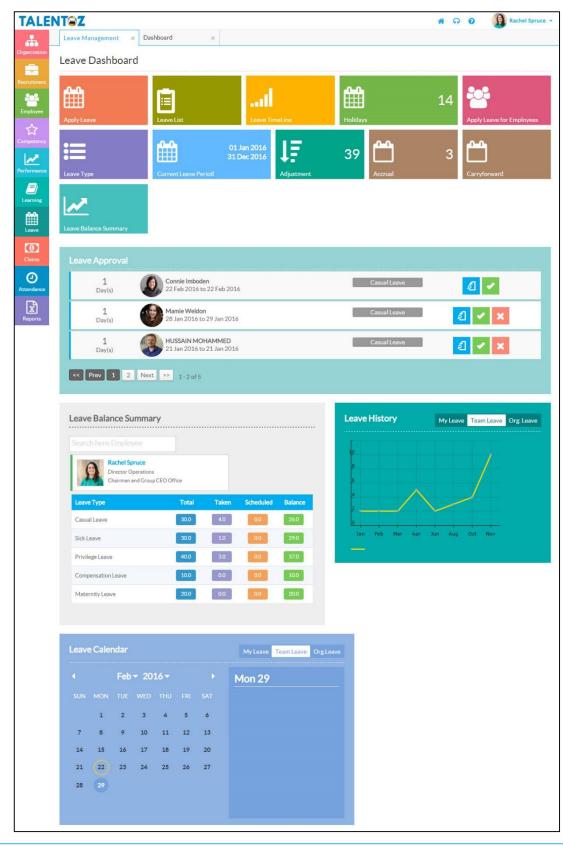


Fill in the leave application with necessary details and click on button.



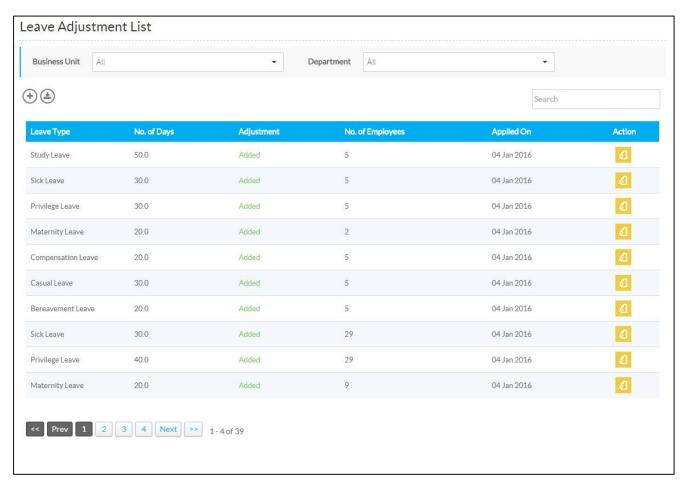
Add / Deduct Leave Adjustment for Employee(s)

To add / deduct leave adjustment for employee(s), click on the Leave Management menu. Leave management dashboard page will get as shown in the figure.



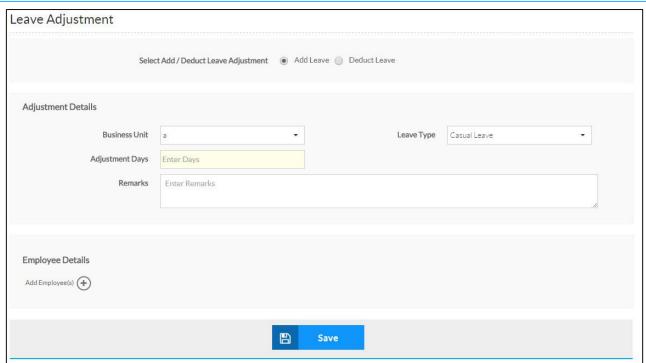


Click on the Adjustments tile available in the leave dashboard. Leave Adjustment List will get displayed as shown in the figure.



Click on (a) icon, Leave Adjustment page will get displayed as shown in the figure.

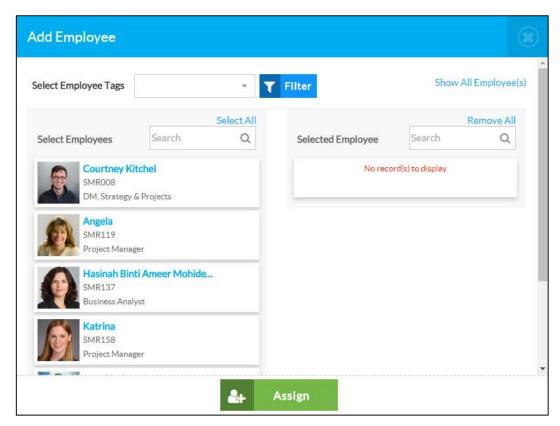




Select the option Add leave or Deduct Leave.

Enter the Adjustment Details.

Select the employees for adjustment by clicking $^{\scriptsize\textcircled{+}}$ icon. Add employee modal window will get displayed as shown in the figure.





Select the required employee(s) to whom adjustment is to be made and click on you will be redirected to Leave Adjustment page.

After adding employee, verify the details and click on button. Adjustment details gets saved.