MSF Leave Management Portal Documentation

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Introduction

Overview

Purpose

The Leave Management Portal is a comprehensive solution designed to streamline and simplify the process of managing employee leave within MSF. The primary purpose of this portal is to provide a centralized platform for employees, managers, and administrators to efficiently handle leave requests, approvals, and tracking, ultimately fostering a more organized and transparent leave management system.

Key Features

Leave Planner

The Leave Planner feature empowers users with an intuitive visual representation of leave schedules, allowing for efficient planning and coordination across teams. Managers can easily identify overlapping leave periods, ensuring continuous workflow and optimal resource allocation.

Real-Time Dashboards

Dynamic dashboards provide at-a-glance insights into leave balances, pending requests, and team availability. This real-time visibility enhances decision-making, allowing managers to assess workforce availability and plan accordingly.

Automated Notifications

The portal incorporates automated in-app notifications, keeping employees and managers, informed about the status of leave requests, upcoming leaves, and any critical updates. This feature ensures timely communication and reduces the risk of overlooked requests.

Leave Adjustments

Leave Adjustments allow for flexibility in managing leave balances. Employees can make adjustments as needed, ensuring accurate and up-to-date leave records

Approvals

Managers can efficiently review and approve leave requests through a streamlined approval workflow. The system provides a centralized location for managing approvals, reducing delays and enhancing the overall efficiency of the leave management process.

Leave Reports

Generate comprehensive leave reports to gain insights into employee leave patterns.

Benefits

- Time Efficiency: Reduces the time and effort associated with manual leave management processes, allowing employees and managers to focus on their core responsibilities.
- Transparency: Enhances transparency by providing real-time visibility into leave balances, approval workflows, and team availability.
- Compliance: Helps ensure compliance with organizational leave policies and regulatory requirements, minimizing the risk of errors and discrepancies.
- Improved Planning: Facilitates better workforce planning by enabling managers to view and manage team leave schedules efficiently.

Target Audience

The Leave Management Portal caters to two main user groups:

- Employees: Who submit leave requests, view their leave balances, and receive notifications about the status of their requests.
- Managers: Who approve or reject leave requests, view team calendars, and ensure adequate coverage within their teams.

Vision

The Leave Management Portal aims to create a seamless and user-friendly experience that empowers organizations to effectively manage employee leave, promote workforce well-being, and enhance overall productivity.

Whether you are an employee seeking to request time off, a manager overseeing team schedules, the Leave Management Portal aims to be your go-to solution for all leave-related activities.

By leveraging modern technology and best practices in leave management, we aspire to bring efficiency, transparency, and compliance to your organization's leave processes, contributing to a healthier work-life balance and a more productive workplace.

Getting Started

Accessing the Portal

To access the Leave Management Portal, follow these steps:

1. Open your preferred web browser.
2. Enter the following URL in the address bar: https://erp.msf.or.ke/selfservice

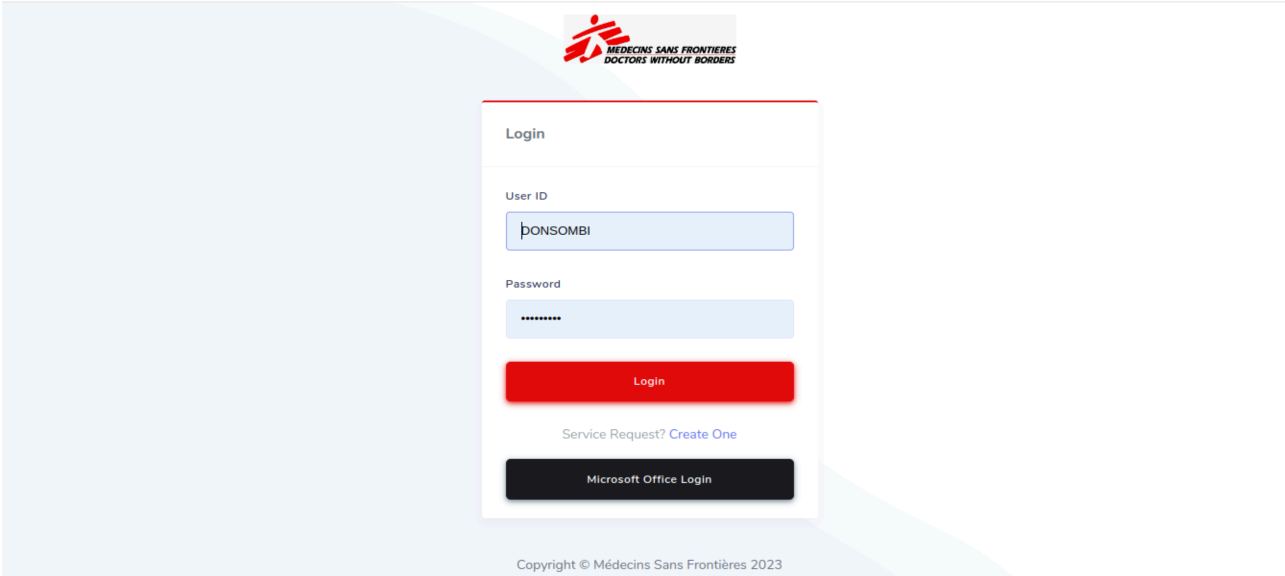

FIGURE 1 LOGIN PAGE

Logging In

After accessing the portal, you will be directed to the login page. To log in, follow one of the methods below:

Microsoft Business Central Credentials

- Enter your Microsoft Business Central credentials, including your username and password, in the provided fields on the login form.
- Click the "Login" button.

Microsoft Office Login

- Alternatively, you can use your Microsoft Office credentials by clicking on the "Microsoft Office Login" button.
- You will be redirected to the Microsoft Office login page.
- Enter your Office credentials and follow the prompts to authenticate.

- Once authenticated, you will be redirected back to the Leave Management Portal.

Note: Ensure that your credentials are accurate to successfully access the portal.

Dashboard

Overview

The home dashboard serves as the central hub for monitoring and managing leave-related activities within the Leave Management Portal. It provides a comprehensive view of key metrics and navigation options for users.

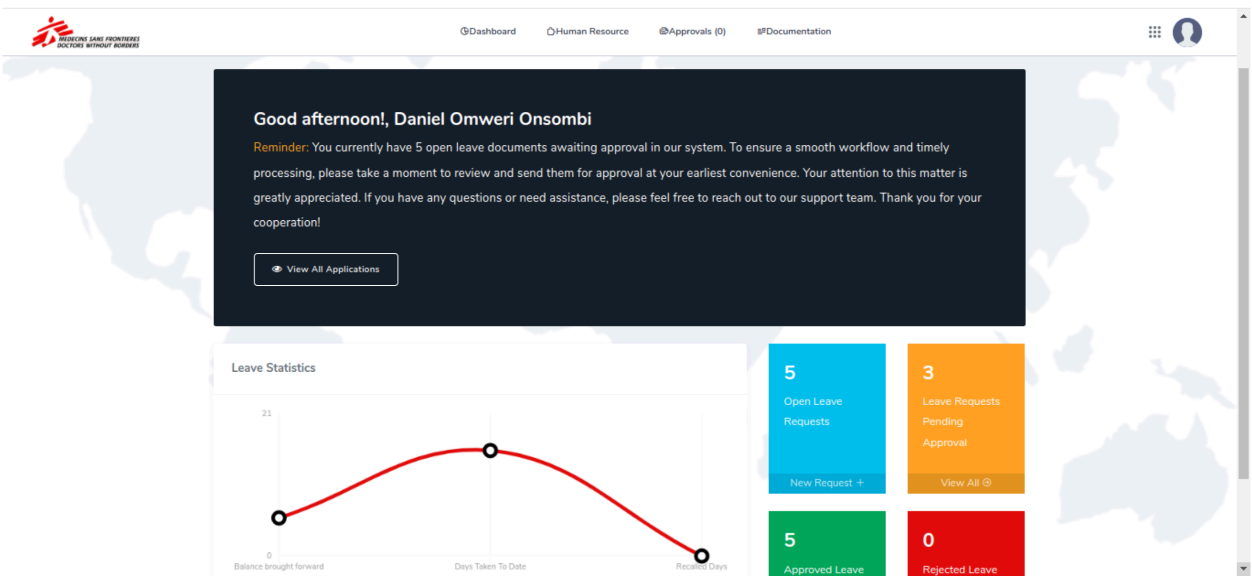

Figure 2 Home Dashboard

Top Navigation Bar

The top navigation bar facilitates easy access to various sections of the portal. Use the navigation options to explore different features and functionalities seamlessly.

Alert for Open Leave Requests

At the top of the home dashboard, an alert prominently displays the number of open leave requests. This feature ensures immediate attention to pending requests, allowing users to stay informed and take timely action.

Leave Request Stats

The dashboard includes statistical summaries for different categories of leave requests:

- Total Open Requests: Displays the overall number of open leave requests that require attention.
- Pending Requests: Highlights the number of leave requests that are currently pending approval.
- Approved Requests: Shows the total count of approved leave requests.
- Rejected Requests: Indicates the number of leave requests that have been rejected.

Leave Balance Stats

Users can also view essential leave balance statistics, providing insights into their leave usage and entitlement:

- Leave Earned to Date: Presents the total leave days earned by the user up to the current date.
- Available Max Overdraft Days: Displays the maximum allowable overdraft days available for use.
- Annual Leave Balance: Represents the remaining balance of annual leave days for the user.
- Balance Brought Forward: Indicates any leave balance carried forward from the previous year.

- Days Taken to Date: Reflects the cumulative number of leave days taken by the user up to the present.
- Recalled Days: Shows the number of leave days that have been recalled or adjusted.

Leave Planner

Submitting a New Leave Plan

To submit a new leave plan, follow the steps outlined below:

Navigate to the Leave Planner:

- Hover mouse on the top navigation bar.
- Select "Human Resource" from the menu.
- Choose "Leave Planner" from the submenu.
- Click on "New Leave Planner."

Leave Planner Submission Process

The process of submitting a new leave plan involves three steps:

Step 1: Create New Plan

Once on the Leave Planner page, locate and click on the "Create New Plan" button.

This action will initiate the plan creation process. Provide the necessary details, such as the plan name, type, and any additional information required.

Step 2: Add Planner Lines

After creating the plan, you will be directed to the next step. Here, add planner lines by specifying the start date and end date for each segment of the plan.

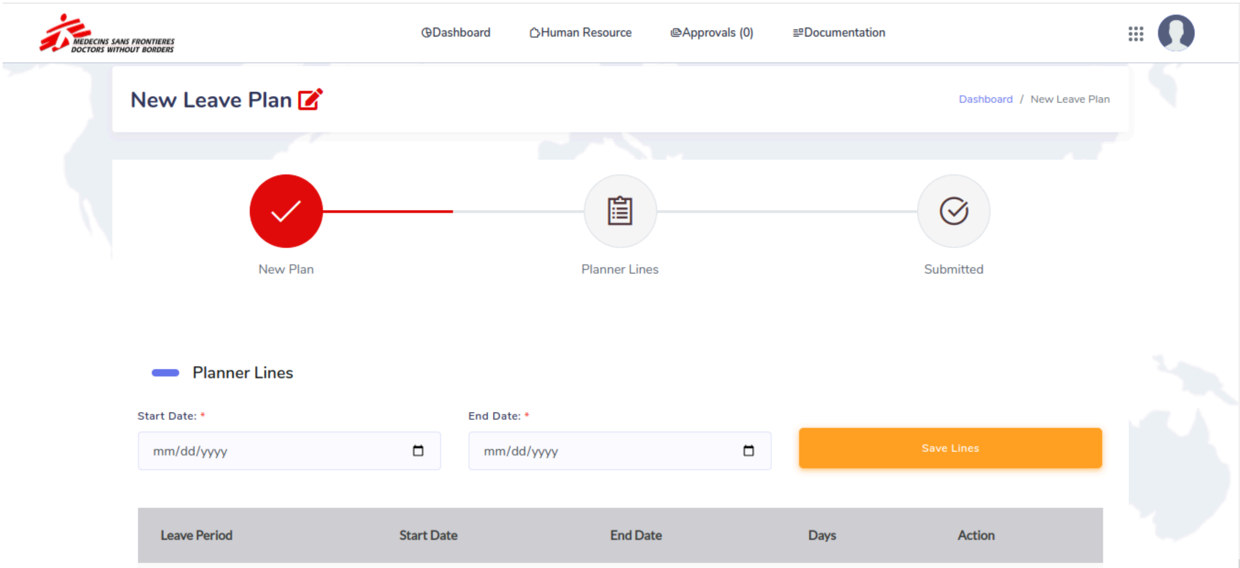

Figure 3: Adding planner lines

Save the plans by clicking the "Save Lines" button. Note that you can create multiple plans for different dates in this step.

Step 2: Submit the Plan

a. Once satisfied with the planned dates and details, click on the "Submit Plan" button.

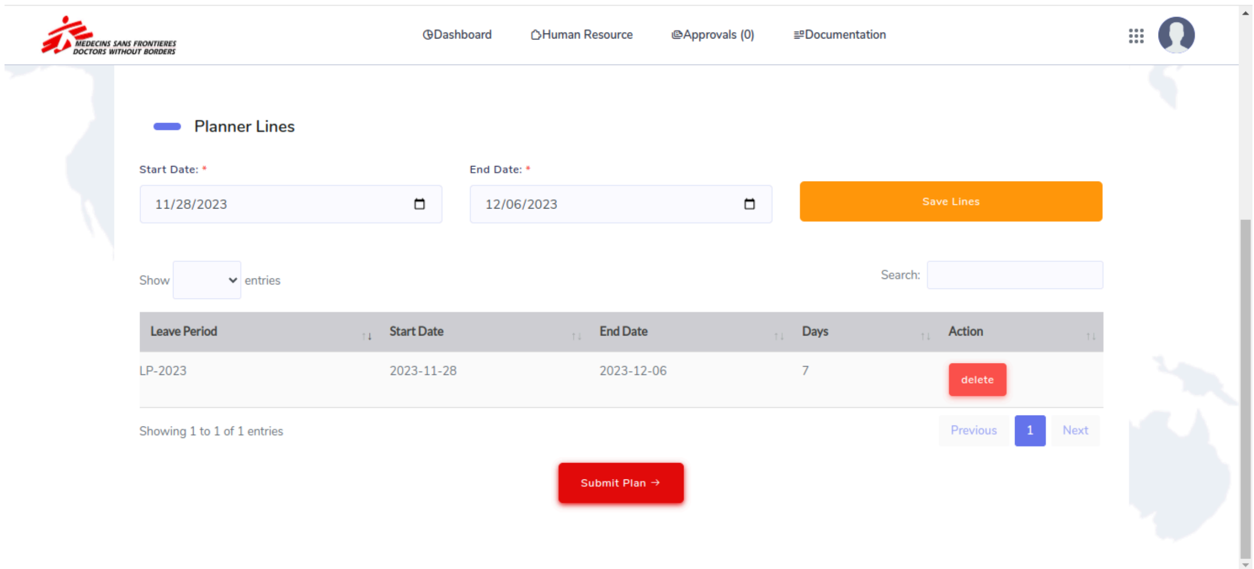

FIGURE 4: SUBMITTING THE PLAN

Viewing and Managing Leave Plans

To view and manage leave plans, follow the steps below:

Navigate to My Plans:

- Hover mouse the top navigation bar
- Select "Human Resource" from the menu.
- Choose "Leave Planner" from the submenu.
- Click on "My Plans."

Leave Plans Table

Upon reaching My Leave Plans page, you will see a tables displaying submitted and open leave plans. The table includes the following information:

- Plan No: The unique number given to the leave plan.
- Employee Name: The employee who initiated the plan
- Document Date: The date the plan was initiated.
- Days Planned: The number of days planned
- Action: Action to manage the plans (Details or ReOpen)

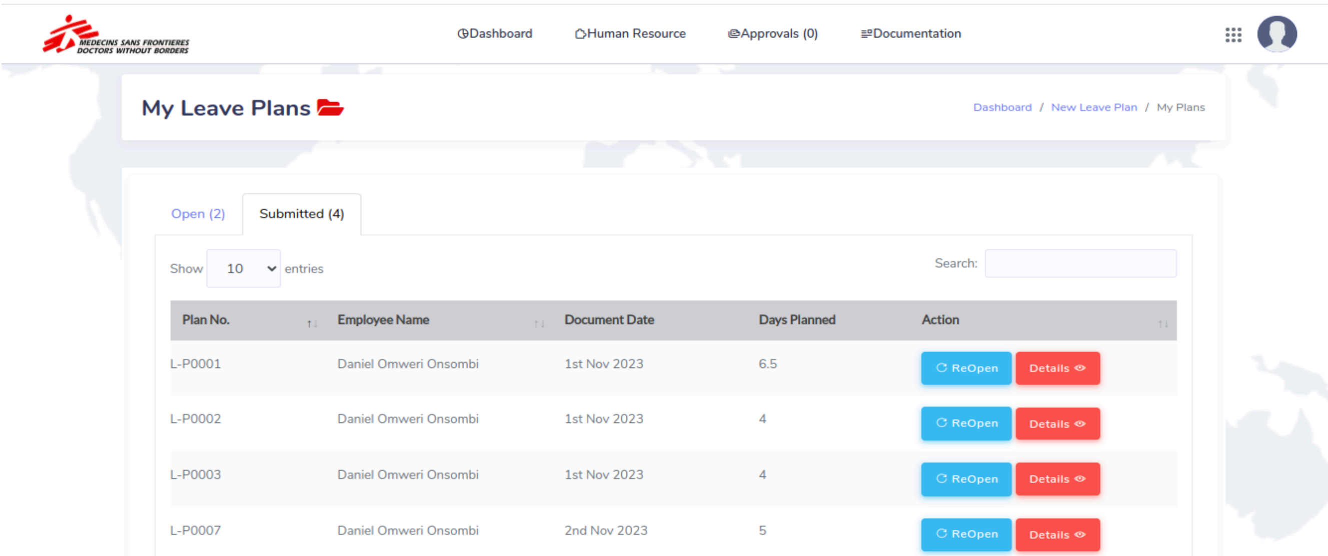

Figure 5: My Leave Plans

Open Plans

Viewing Open Plans

- In the open plans' table, identify the "Open" plan you wish to view then click the details button.

Plan Details

- Upon viewing a plan, you will be presented with details about the plan.
- Options such as "Delete," "Edit," and "Add New Planner Line" are available.

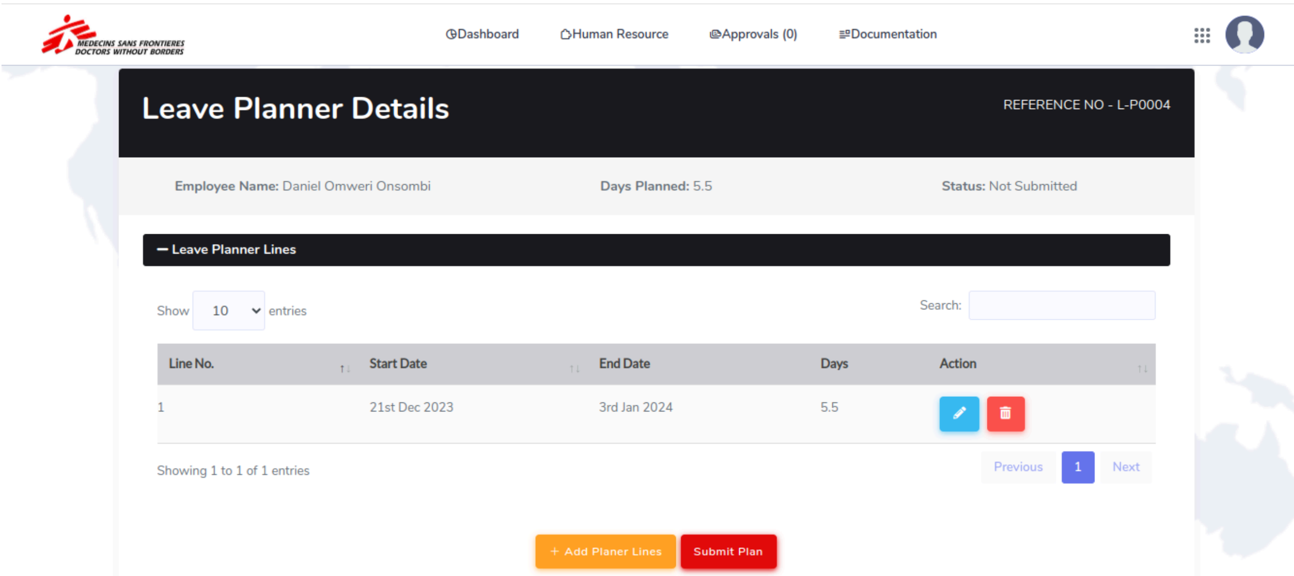

Figure 6: Leave Planner Details

Submitted Plans

Viewing Submitted Plans

- In the submitted plans' table, identify the plan you wish to view then click the details button.

Plan Details

- Upon viewing a plan, you will see detailed information about the submitted plan.
- If adjustments are necessary, click on the "ReOpen" button.

ReOpening a Submitted Plan

- Clicking "ReOpen" allows you to make adjustments to the plan.
- Options such as "Delete," "Edit," and "Add New Planner Line" become available.

Making Plan Adjustments

Editing a Plan

- Upon viewing a plan, both open and reOpened plans, the "Edit" option allows modifications to the existing plan details.

Adding New Planner Lines

- Use the "Add New Planner Lines" option to add a new plan to the existing header.

Deleting a Plan

- The "Delete" option allows you to remove a planner line entirely.

Saving Changes

- After making adjustments, ensure to save changes to update the leave plan with the modified details by clicking on submit plan button at the bottom of the page.

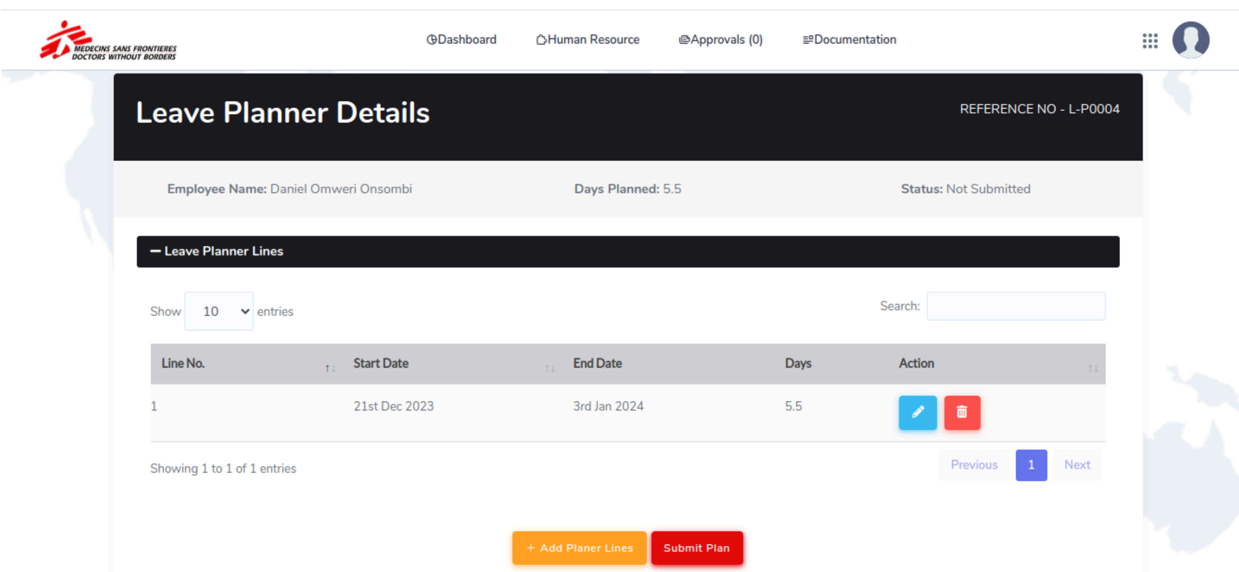

FIGURE 7: LEAVE PLANNER LINES

Leave Request

Leave Dashboard

Overview

The Leave Dashboard provides a snapshot of leave-related statistics within your department. The following information is accessible:

- Total Absent Today (Blue Card): Displays the total number of employees currently on leave today in your department.
- Leave Requests from Leave Planner (Yellow Card): Shows the total number of leave requests systematically created using the leave planner tool in your department.
- Leave Requests without Leave Planner (Green Card): Indicates the total number of leave requests initiated without utilizing the leave planner tool in your department.

Upcoming Leave Table

The table below displays all upcoming leaves in your department, featuring fields such as Employee Name, Application Date, Leave Type, Start Date, Resumption Date, and Status. The table includes a visual indicator, highlighting employees currently on leave with a grey background.

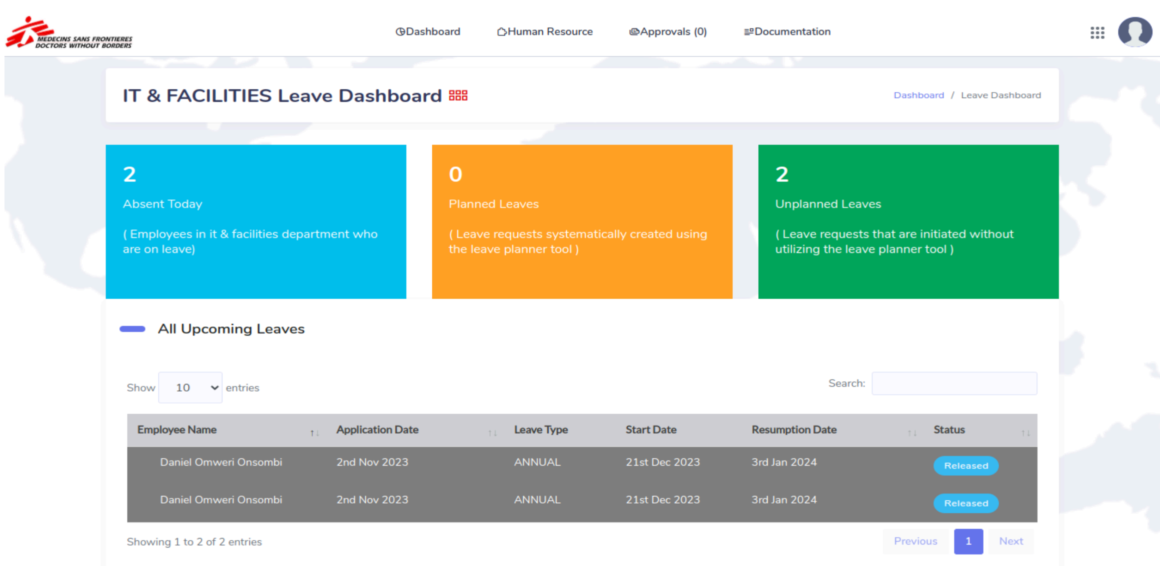

FIGURE 8: LEAVE DASHBOARD

New Leave Request

Step 1: Leave Request Form

1. Click on the "New Leave Request" from Navigation Bar > Human Resource > Leave Request > New Leave Request

2. Fill in the Leave Request Form:

    - Select the leave type.

    - Upon selecting the leave type, your leave balance for that type is populated on the leave balance output.

    - Choose if the Leave is Based on Planner.

        - If yes, select the leave planner start date and the number of days will be auto-populated.

        - If no, enter the leave start date and, choose if returning the same day.

            - If yes, choose the half of the day that you will be unavailable

            - If no, enter the number of days applied.

3. Click "Save Application" to proceed to Step 2.

Step 2: Adding Leave Reliever and Uploading Attachments

1. In the second step:

    - Add Leave Relievers by clicking "Add Reliever" and choosing the reliever's name.

    - Use the "Previous Step" button if you wish to edit the initial leave application.

    - Click "Upload Attachment" if necessary.

2. For uploading attachments:

    - Choose the attachment.

    - Click "Upload."

    - Review and delete attachments if needed.

- Click "Next" to proceed.

3. After adding relievers and completing attachments (if any), click "Submit Application" to initiate the approval process.

Step 3: Leave Approvers

1. In the third step, a table displays Leave Approvers with details such as Name, Sequence, Status, Modified By, and Modified Date.
2. Use the "Previous Step" button to return to Step 2.
3. Click "Cancel Approval Request" to cancel the approval request and return to Step 2
4. Click "My Leave Applications" to navigate to all leave applications page.

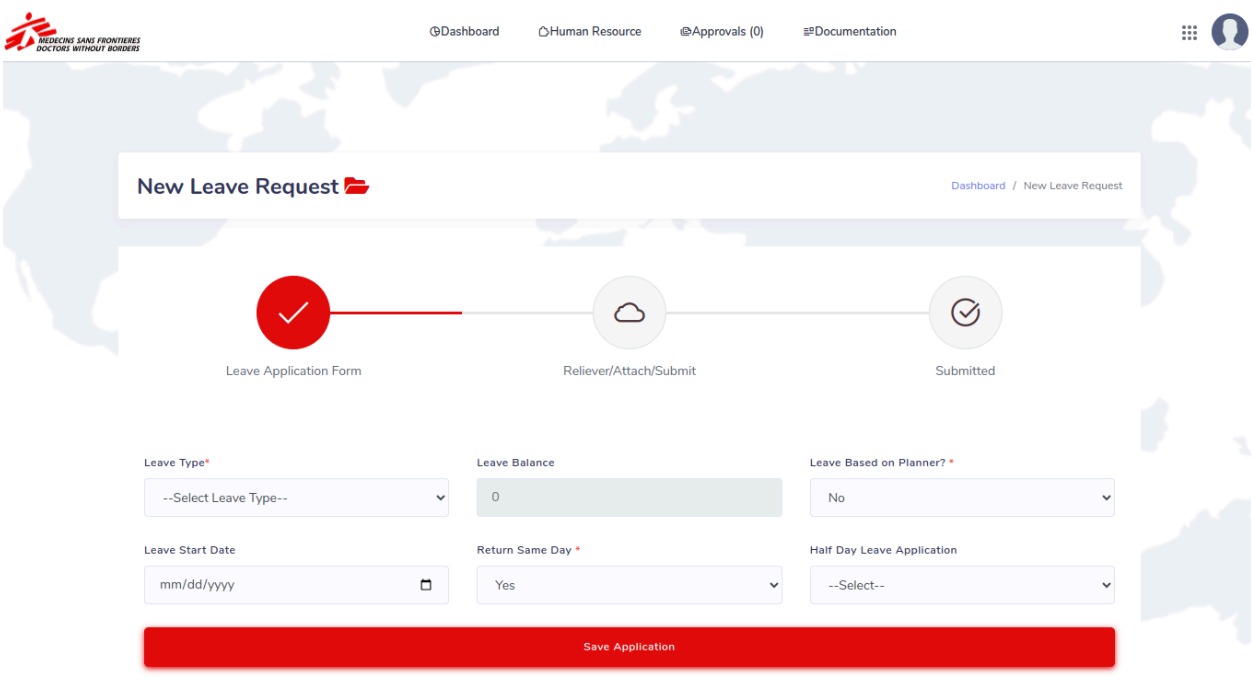

Figure 9: New Leave Request

My Leave Applications

Overview

The "My Leave Applications" page features four tabs: Open, Pending Approval, Approved, and Rejected leave applications. Each tab contains a table with details such as Leave No, Application Date, Leave Type, Start Date, Resumption Date, Status, and Action.

- For open leave applications, the action includes "Edit" and "Details" buttons.
- For pending approval, approved, and rejected applications, the action is the "Details" button.

Details Page

- Clicking on the "details" button for an application redirects to a page displaying detailed information.
- For applications with status as Open, the page theme color is black, and buttons for **uploading attachments, submitting the application, and adding/deleting relievers** are available.
- If the status is **Pending Approval**, the theme color is yellow, and the "**Cancel Request for Approval**" button is visible.
- If the status is **Approved**, the theme color is green, and the "**Preview Report**" button is visible.
- If the status is **Rejected**, the theme color is red, and buttons for **uploading attachments, submitting the application, and adding/deleting relievers** are available.

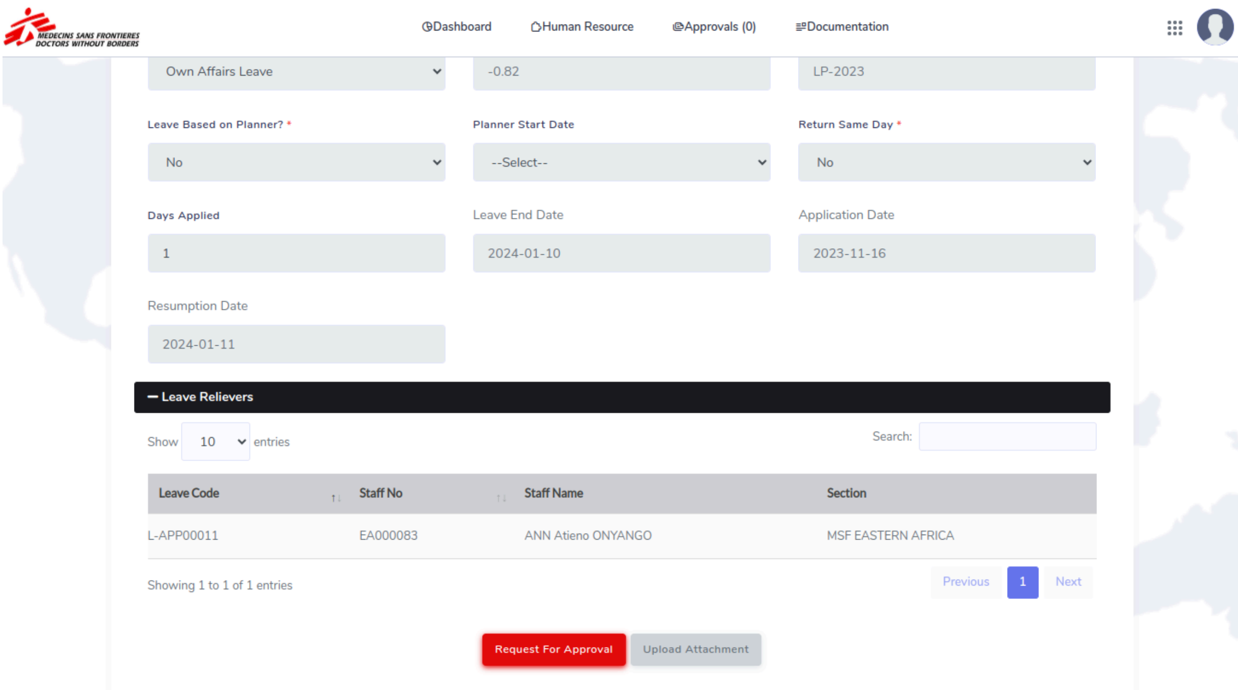

Figure 10: leave details

Leave Adjustments

Navigating to Leave Adjustments

To access the Leave Adjustments section, follow these steps:

- Hover mouse on the top navigation bar.
- Select "Human Resource" from the menu.
- Choose "Leave Adjustments" from the submenu.
- Click on "New Adjustment."

New Leave Adjustment

Creating a New Adjustment

1. In the New Leave Adjustment form, fill in the "Adjustment Description."

2. Click "Save" to submit the adjustment.

3. After saving, you'll be redirected to the Adjustment Details page, displaying information about the adjustment.

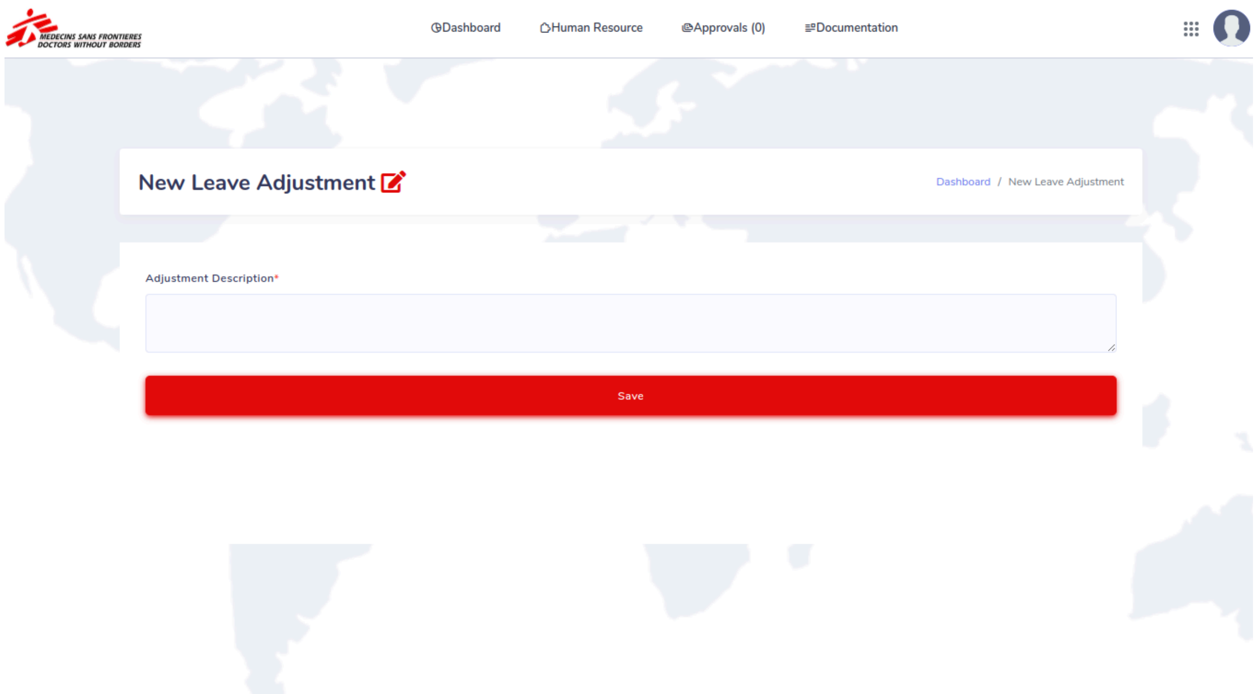

Figure 11: New leave adjustment

Adjustment Details Page

- If the status is open (black color theme), proceed to add Leave Adjustment Lines.
- If the status is pending approval (yellow theme), view details, lines, and approvers.
- If the status is approved (green theme) or rejected (red theme), the details and status are displayed.

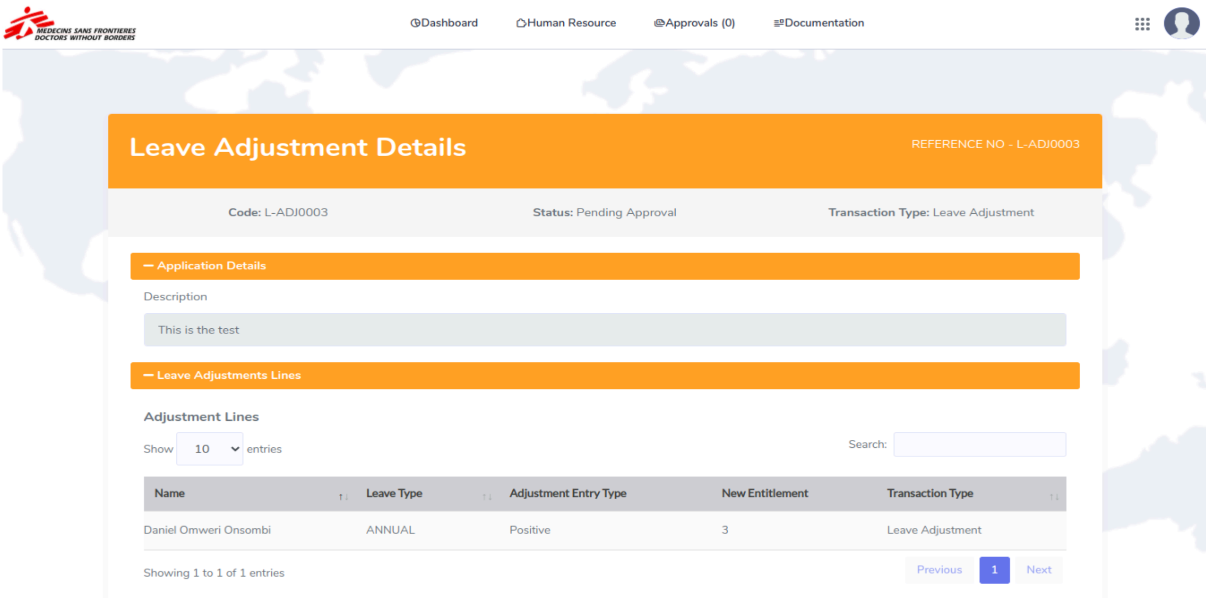

Figure 12: Adjustment Details

Leave Adjustment Lines

Adding Leave Adjustment Lines

- If the status is open, fill out the "Leave Adjustment Lines" form with fields leave type, transaction type, and entitlement adjustment.
- Click "Save Lines" to add the lines.
- The lines are displayed in the Adjustment Lines table with edit/delete buttons (if status is open) in the action column.

Managing Adjustment Lines

- If the status is open, use the edit/delete buttons to manage the adjustment lines.

Requesting Approval

If the status is open, there's a "**Request For Approval**" button to submit the adjustment after adding lines.

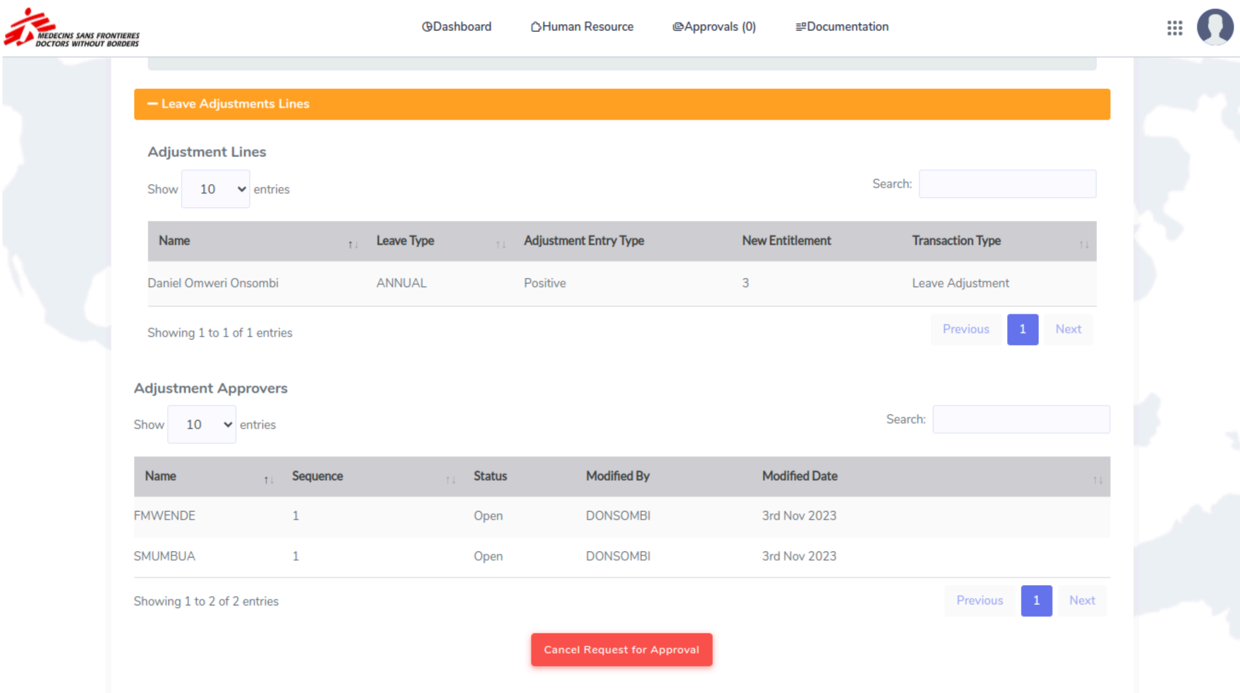

FIGURE 13: ADJUSTEMNT PENDING APPROVAL

Pending Approval

- If the status is pending approval, the theme changes to yellow.
- View details, lines, Cancel Request for Approval button, and the Adjustment Approvers table showing the approval sequence.

Approved and Rejected

- If the status is approved, the theme changes to green.
- If the status is rejected, the theme changes to red.

My Adjustments

Overview

The "My Adjustments" page features four tabs: Open, Pending Approval, Approved, and Rejected. Each tab contains a table with details such as Leave No, Transaction Type, Status, Description, and Action.

- For all adjustments, there is an action button to view the details of a certain adjustment.

View All Adjustment Applications

To view all adjustment applications, navigate to the following:

Click on the top navigation bar.

Select "Human Resource" from the menu.

Choose "Leave Adjustments" from the submenu.

Click on "My Adjustments."

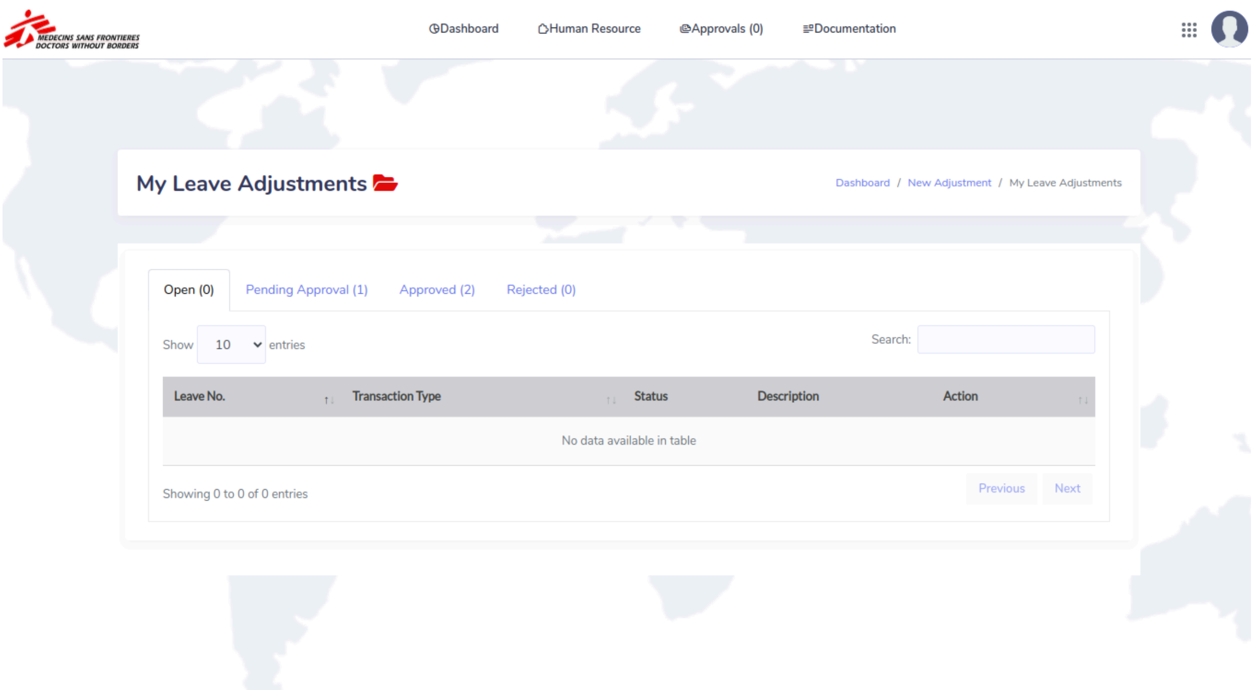

Figure 14: All adjustments

Leave Reports

Navigating to Leave Reports

To access Leave Reports, follow these steps:

- Click on the top navigation bar.
- Select "Human Resource" from the menu.
- Choose "Leave Reports" from the submenu.

Leave Reports Form

Upon reaching the Leave Reports page, a form is displayed where you can choose the type of report to preview. Additional inputs are dynamically presented based on the selected report type.

Choosing Report Type

- Select the type of report you want to generate: Leave Summary Report, Leave Statement Report, or Leave Report.
- Depending on the report type selected, additional inputs specific to that report will be displayed.

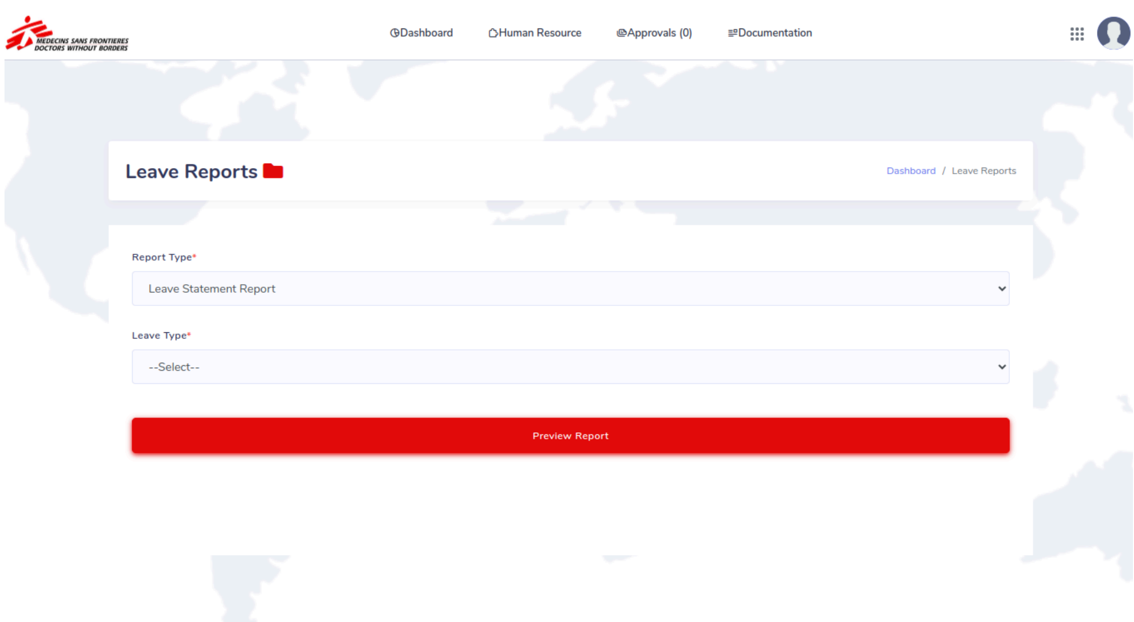

FIGURE 15: LEAVE REPORTS

1. Previewing Reports

Filling Out the Form

- Fill out the necessary information in the form, including any additional inputs based on the selected report type.
- Ensure that all required fields are completed accurately.

Previewing the Report

- Click on the "Preview Report" button after filling out the form.
- The system will generate and display a preview of the selected report based on the provided parameters.

Approvals

Navigating to Approvals

To access the Approvals section, follow these steps:

- Click on the top navigation bar.
- Select "Approvals."

Approval Requests Page

Upon reaching the Approval Requests page, you will find three tables displaying data for different approval statuses:

Documents Pending Your Approval

- This table shows documents that are pending your approval.
- The columns include Document Type and an Action column with a "Details" button.

Documents You Approved

- This table displays documents that you have already approved.
- The columns include Document Type and an Action column with a "Details" button.

Documents You Rejected

- This table presents documents that you have rejected.
- The columns include Document Type and an Action column with a "Details" button.

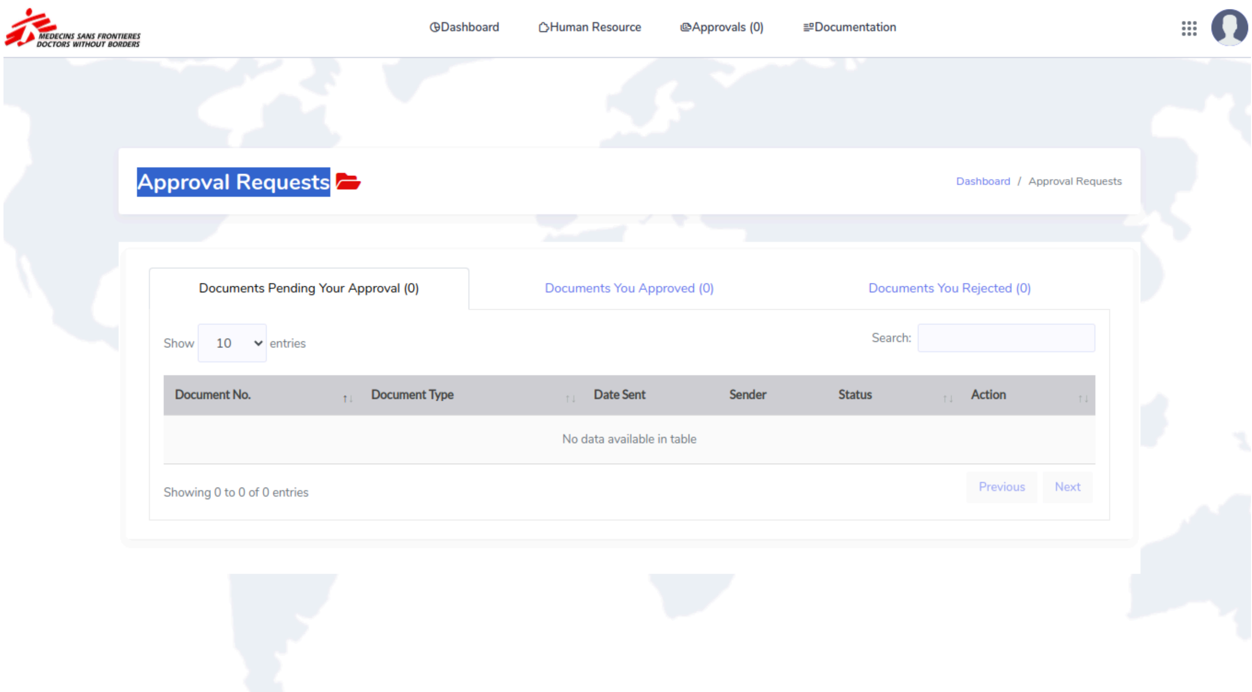

FIGURE 16: APPROVAL REQUESTS

Details Page

Viewing Document Details

- Clicking on the "Details" button for a document in any of the tables will take you to the details page.

Document Details

- On the details page, you can view the specifics of the document to be approved, including any attachments.

Leave Application Details

- If the document type is a leave application, you can view/modify reliever details.

Approvers Details

- Details of all the approvers involved in the approval process are visible on this page.

Approving or Rejecting

Open Approval Status

- If the status is open, you have the option to approve or reject the document.
- Click the "Approve" button to approve the document.
- If rejecting, enter the reason for rejection and click the "Reject Approval" button.

Navigation Options

Back to Approvals

- After approving or rejecting, use the navigation options to go back to the main Approvals page.

Other Navigation Options

- Utilize other navigation options provided on the page based on your specific design and functionality.

User Icon Tray

Accessing User Icon Tray

- Locate the user icon on the top-right corner

Dropdown Options

- Clicking on the user icon triggers a dropdown menu with the following options:
    - Logged In User Icon: Displays the icon associated with the currently logged-in user.

- Profile Menu: Redirects to the profile management page
- Dashboard Menu: Directs the user to the main dashboard or home page of the application.
- Sign Out: Logs the user out of the system.

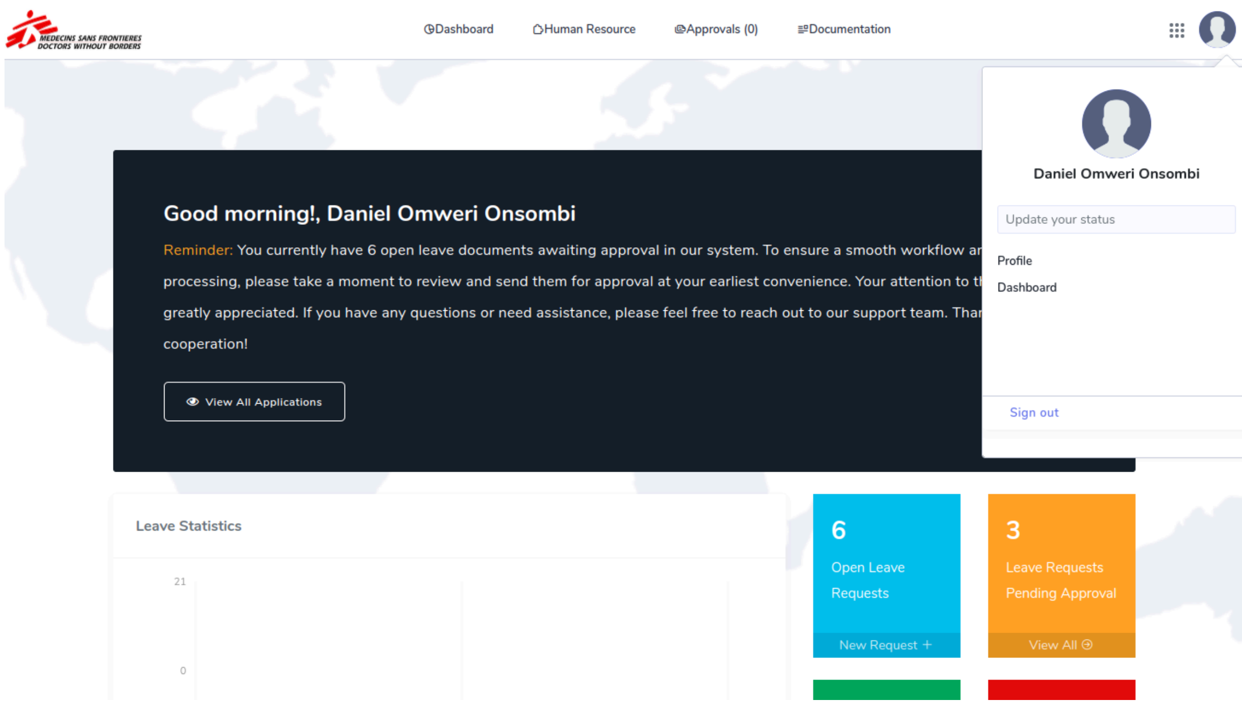

Figure 17: Navigation & icon tray

Navigation Convenience

- Users can conveniently access their profile, dashboard, and sign-out options directly from the user icon tray.

Profile Management Page

The Profile Management page displays all details related to the logged-in user.

User Details

- Personal details of the user, including name, employee ID, section, position, and contact information.

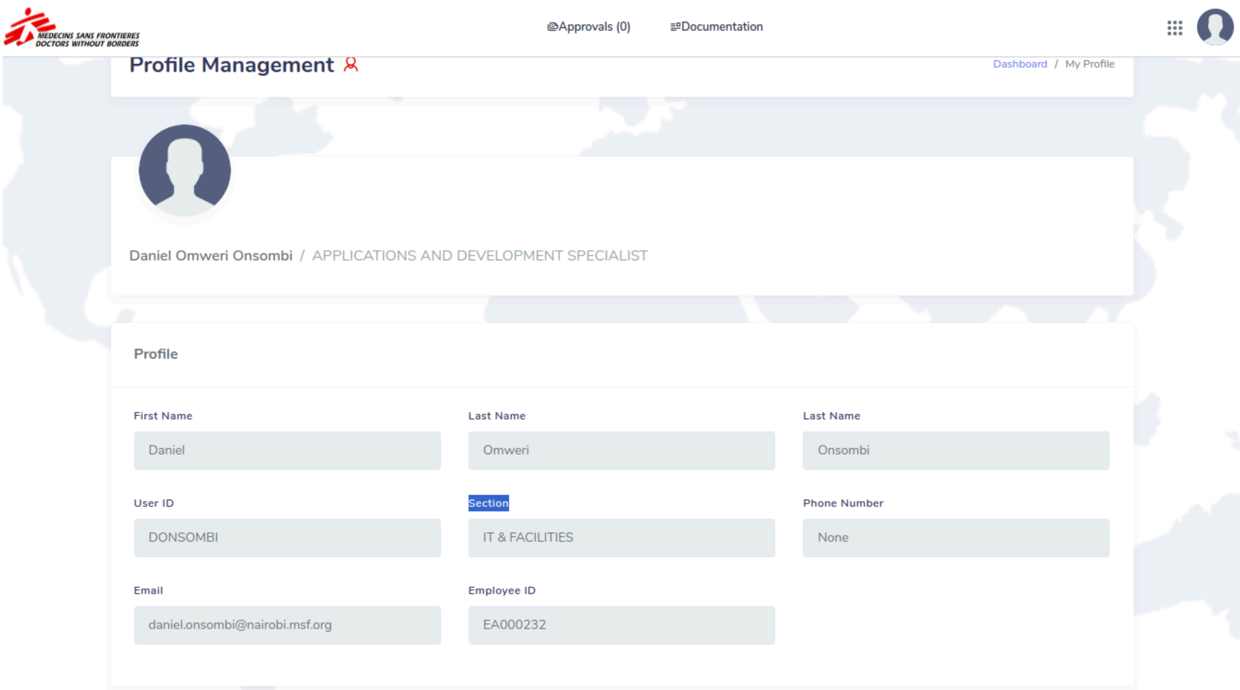

Figure 18: Profile management