



Leave Management System

User Guide

Leave Categories

Here you can define the types of leave in your organization.

For each leave type, one can set:

- The maximum number of days an employee can be awarded
- The maximum number of days allowed to carry forward to the next year
- The 'Earn as you work mode', i.e. how the leave days will progressively accumulate:
- e.g.
 - Yearly Increment will award full leave days at the beginning of each year
 - Monthly Increment will award a portion of leave days per month, for instance 1.75 days each month worked.

The screenshot shows a web interface for managing leave categories. At the top, there are navigation tabs: 'leave', 'Employees', 'Leave', 'HRM Settings', and 'Settings'. Below this, a dropdown menu is open, listing options: 'My Leave', 'Leave Manager', 'Leave Application', 'Leave Logs', 'Leave Opening Balances', 'Leave Categories', 'Leave Report', 'Holidays', and 'Non-working Days'. The main content area is titled 'Leave Categories' and contains a table with the following columns: 'Code', 'Title', 'year', 'Max. days carried forward to next year', and 'Earn as you work (Leave days earned Progressively)'. The table lists several categories, including Annual Leave, Maternity Leave, Paternity Leave, Study Leave, Sick Leave, and Compassionate Leave. The 'Earn as you work' column has a dropdown menu open for the first row, showing options: 'Monthly', 'Yearly', 'Monthly', and 'Weekly'. At the bottom of the table, there is a '+ Add Category' button and an 'Update Categories' button.

Code	Title	year	Max. days carried forward to next year	Earn as you work (Leave days earned Progressively)
1. 001	Annual Leave		0	Monthly
2. 002	Maternity Leave		0	Select Leave Increment
3. 003	Paternity Leave		0	Yearly
4. 004	Study Leave		0	Monthly
5. 005	Sick Leave		0	Weekly
6. 006	Compassionate Leave	0	0	Select Leave Increment
7.				Select Leave Increment
8.				Select Leave Increment

Leave Opening Balance

One of the first steps when setting up to set the number of leave days currently available to each employee at the time of starting to use Wingubox Leave. This can be thought of as opening stock in a shop's inventory.

The screenshot displays the 'leave' management interface. At the top, there are navigation tabs: 'Employees', 'Leave', 'HRM Settings', and 'Settings'. The 'Leave' tab is active, showing a dropdown menu with options: 'My Leave', 'Leave Manager', 'Leave Application', 'Leave Logs', 'Leave Opening Balances', 'Leave Categories', and 'Leave Report'. The 'Leave Opening Balances' option is selected.

Below the navigation, there are filters: '-- All Departments --' and '-- All Regions --', followed by a 'Annual' filter and a 'Refresh Data' button. The 'Total Employees' count is 10.

The main content is a table with the following data:

Staff No.	Name	Opening Balance (Days)	Current Balance (Days)
008	Aisha M Mwajuma	5	5
001	Caroline M Forbes	10	10
002	Jeremy S Gilbert	21	21
005	John Kemunto Sichangi	3	3
007	Kibet Charles Langat	9.5	8.5
010	Patricia Wambua Kivutu		
009	Rodrick Salim Said		
004	Rose Wandia Wanjiku		
003	Tyler M Kibe		
006	Zaddy Newtons Maraga	11	11

At the bottom of the interface, there are two buttons: '+ Add balance' and 'Update balances'.

Leave Application

An employee with a log in account can apply for leave online or the Leave Admin can apply for leave on behalf of an employee.

Leave application can be in full days (default) or partial days (e.g. half-day of morning hours only)

The screenshot shows the 'Leave Application' form in a web application. The form is titled 'Leave Application' and has a 'View applied leaves' button. The form fields include: Employee Name (Kibet Charles Langat), Leave Type (Annual Leave), Leave Balance (9.5 days left), Date Range (16/08/2016 08:00 AM To 18/08/2016 05:00 PM), Duration (3 Days), Mode (Partial Days (E.g. Half Day)), and Comments. A 'Submit' button is at the bottom. A dropdown menu is open, showing options: My Leave, Leave Manager, Leave Application, Leave Logs, Leave Opening Balances, Leave Categories, Leave Report, Holidays, and Non-working Days. The 'Leave Details' section is visible on the right side of the form.

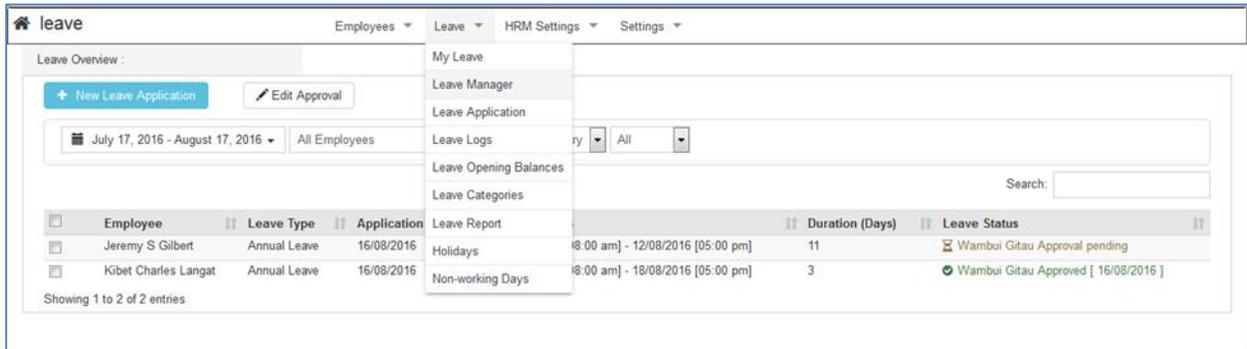
Once a leave application is submitted, it follows the approval workflow sequence before it can be active.

The screenshot shows the 'Leave Application' form in a web application, now showing the approval workflow. The form fields are the same as in the previous screenshot. A blue notification box on the right side of the form contains the following information: Submitted on 16 Aug, 2016 by Wambui Gitau, Status: Wambui Gitau Approval pending. At the bottom of the form, there are three buttons: 'Update', 'Approve', and 'Decline'.

Leave Manager

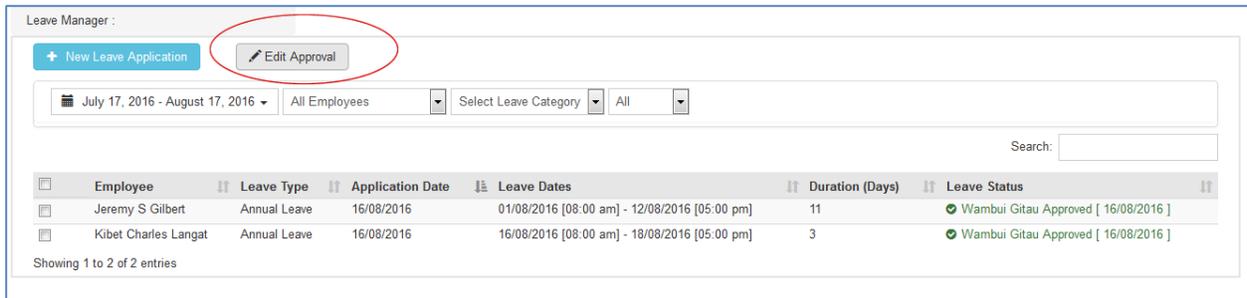
The Leave Manager is used to view all leave applications and their current approval status.

One can then click on a certain application to action it. i.e. Approve, decline or edit



Leave Approval

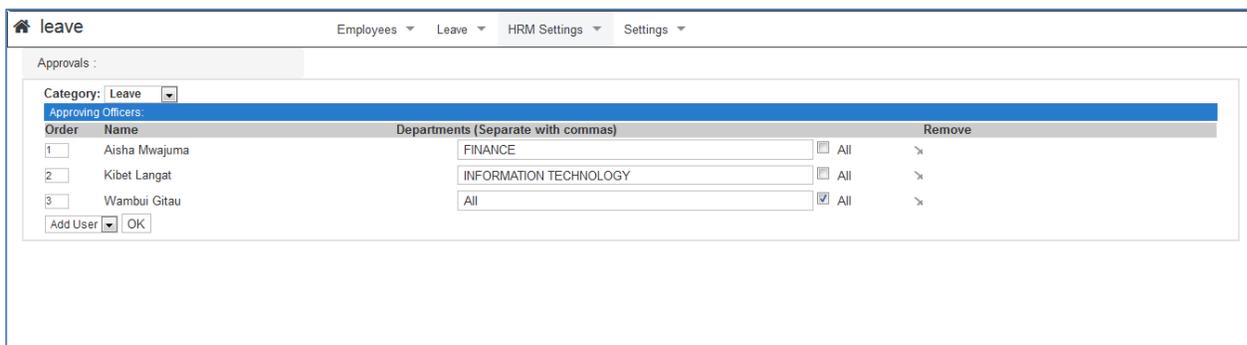
Under Leave Manager, click on 'Edit Approval' to configure leave automated approval workflow.



An approver can be in charge of selected departments or all departments.

The system will use the Ordering and departments to determine the next approver

All alerts are email based.



Leave Logs

Leave logs show an account of all activities for each employee, for each leave category (type).

They can also be used to make manual amendments by adding or subtracting days from an employee's leave balance.

leave Employees Leave HRM Settings Settings

Leave Logs :

January 1, 2016 - August 16, 2016 Kibet Charles Langat Annual Leave Refresh Data

Available Days: 8.5

Date	Description	User	Days	Balance
	Balance B/F			9.5
16/08/2016	leave days used	System	-1	8.5
16/08/2016	Additional days awarded	Wambui Gitau	3	11.5
16/08/2016	Manual Correction	Wambui Gitau	-3	8.5

+ Add Log Update Logs

1. Reversed 1 Annual Leave log(s)

Holidays and Off-Days

When calculating days on leave, the system does not count public holidays and off-days.

Your configuration comes with default public holidays in Kenya with exception of Easter and Idd Fitr. These holidays differ from year to year and have to be entered manually by the user.

Holidays

Holiday Title	Date	Recurs Yearly
1. Boxing Day	26/12/2016	<input checked="" type="checkbox"/>
2. Christmas Day	25/12/2016	<input checked="" type="checkbox"/>
3. Jamuhuri Day	12/12/2016	<input checked="" type="checkbox"/>
4. Labour Day	01/05/2016	<input checked="" type="checkbox"/>
5. Madaraka Day	01/06/2016	<input checked="" type="checkbox"/>
6. Mashujaa Day	20/10/2016	<input checked="" type="checkbox"/>
7. New Year	01/01/2016	<input checked="" type="checkbox"/>

Off-Days

Click Here to edit varying off days for employees

Seperate with commas e.g (Saturday,Sunday)

Sunday

Managing Users

Login accounts should be created for all employees required to login.

The basic access level is 'Employee'.

A user of 'Employee' access level can be a leave approver as long as they have been added to the approval workflow

The screenshot shows the 'leave' system's user management interface. The main form is titled 'Add a new User account' and contains the following fields and options:

- First Name:** Kibet
- Last Name:** Langat
- Email:** kkibet@gmail.com
- Time Zone:** (GMT+03:00) Nairobi
- Date Format:** dd/mm/yyyy
- Temporary Password:** Hxxr22HU (with a 'Set password?' link)
- Require Password Reset:**

On the right side, there is a 'Mail Settings' section with a table of applications and their access levels:

App	Access Level
<input type="checkbox"/> PAYROLL(KENYA)	Select a Level
<input checked="" type="checkbox"/> LEAVE	Employee
<input type="checkbox"/> HOSTING	Select a Level
	Employee
	Advanced
	Administrator