

**BIPO** | Make Life Easier.

# **BIPO HRMS**

**Leave Module User Guide**

**Version Date: 01/04/2026**

**Version 3.0**

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## Important Notice

The information contained in this document is strictly confidential. The unauthorized use, disclosure, copying, alteration, or distribution of this document is strictly prohibited.

## Version Control

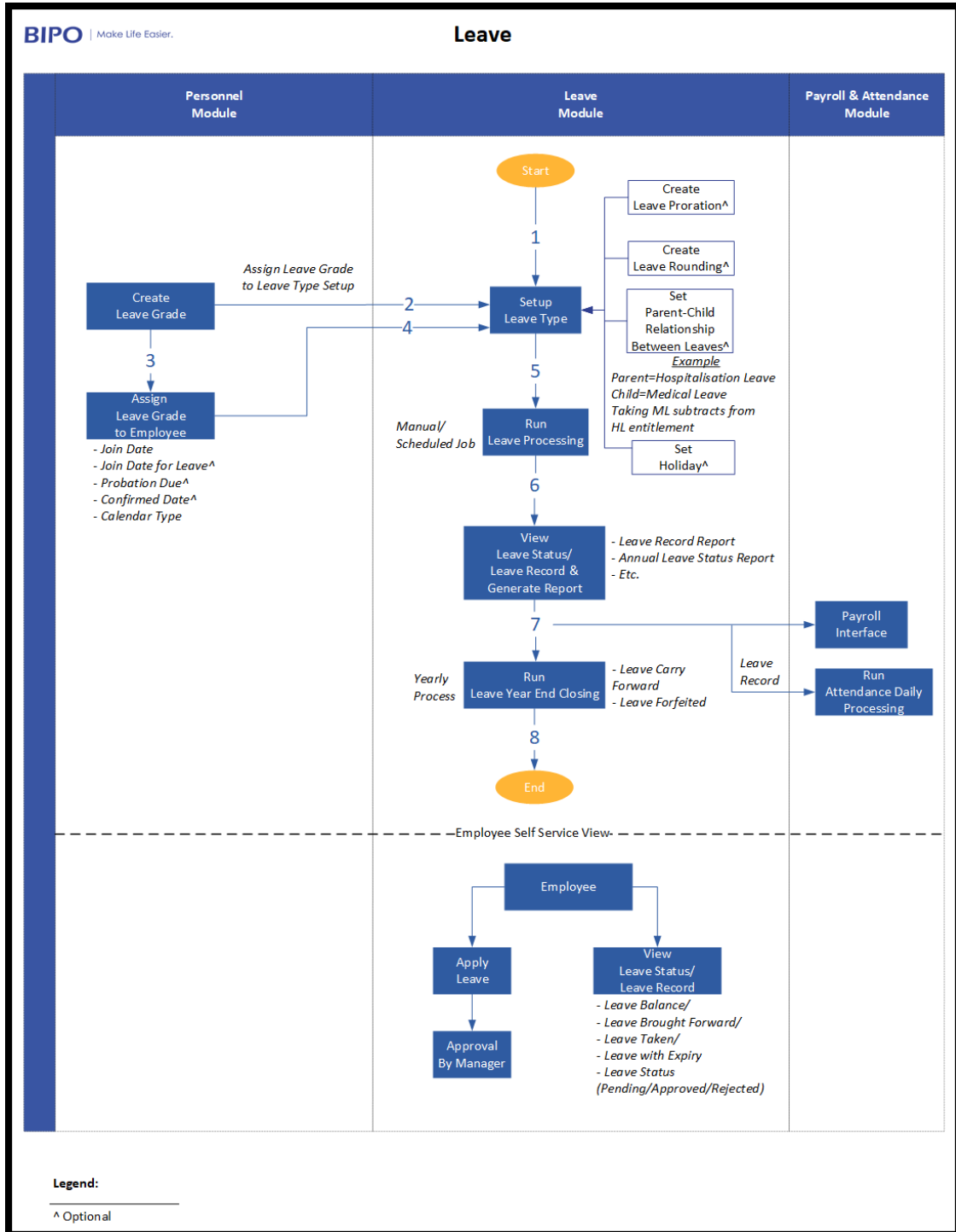
The history and reasons for the changes in this version of this document is as follow :

Version	Date	Author	Change Description
1.0	10 Jan 2023	Sunny Chew	Enhancement 2021
2.0	26 Apr 2023	Sunny Chew	Enhancement 2022
3.0	1 Apr 2026	Sophia Soong	<ul style="list-style-type: none"> <li>- Added Appendix 2 for Employee Range</li> <li>- Update hyperlink of Employee Range setting.</li> </ul>

Where significant changes are made to this document, the version number will be incremented by 1.0.

Where changes are made for clarity and reading ease only and no change is made to the meaning or intention of this document, the version number will be increased by 0.1.

# Leave Flow Chart



## Leave Grade

### Creating Leave Grade

**Leave grade** is setup based on client's requirement. For example, if the *Leave Type's* service year assigned to employee is based on promotion date, leave grade will be required. As leave entitlement is based on the employee's leave grade assigned with effective date.

**Access: Personnel Module > Reference > Assignment > Leave Grade**

1. Click **+** button the following screen will appear. Enter the relevant information.

- a. **Code** – (Mandatory) Define the code.
  - b. **Name** – (Mandatory) Define the name. Title of the leave grade.
  - c. **Countries/Regions** – (Mandatory) Can be define as all countries or specific country only. This would be depending on the country that this leave grade is applicable to.
  - d. **Obsolete** – Used to disable a leave grade. Select **No** or **-Please select-** if this item is active. By default, it is set to **No**.
2. Once done, click **Update** button to save the configuration.

## Assigning Leave Grade to Employee

**Leave Grade** need to be assign to employees to enable the employee to acquire the entitlement and leave balance calculation.

**Access: Personnel Module > Personnel > Employee > Assignment Tab**

1. Click **+** button the following screen will appear. Select the **Leave Grade** from the drop-down list and click **save** button to save.

**Note: Date Start** by default value is employee's *join date* but the date is editable.

2. **Leave Grade** section with *Last Update By* field will be updated once record is saved.

## Setup Leave Type

**Leave Master** is to set up different leave types to cater to user's needs and leave policy. To meet the personalized needs of all kinds of leave, the system has allowed various types of *Leave Nature* setting in **Reference** configuration. In the Reference page user can configure leave information and rules/policies. After setting, users can assign leave according to the company policy, entitlement as well as employees can apply leave, view leave records, view leave status and download reports based on the various leave type.

**Access: Leave Module > Reference > Leave**

1. Click **+** and the following screen will appear. Enter the relevant information.

New leave type before click Update button only have 6 tabs

2. Click **🔍** icon allows user to edit or view the existing leave type.

Once user click Update button, system will appear additional tab based on the Leave Nature.

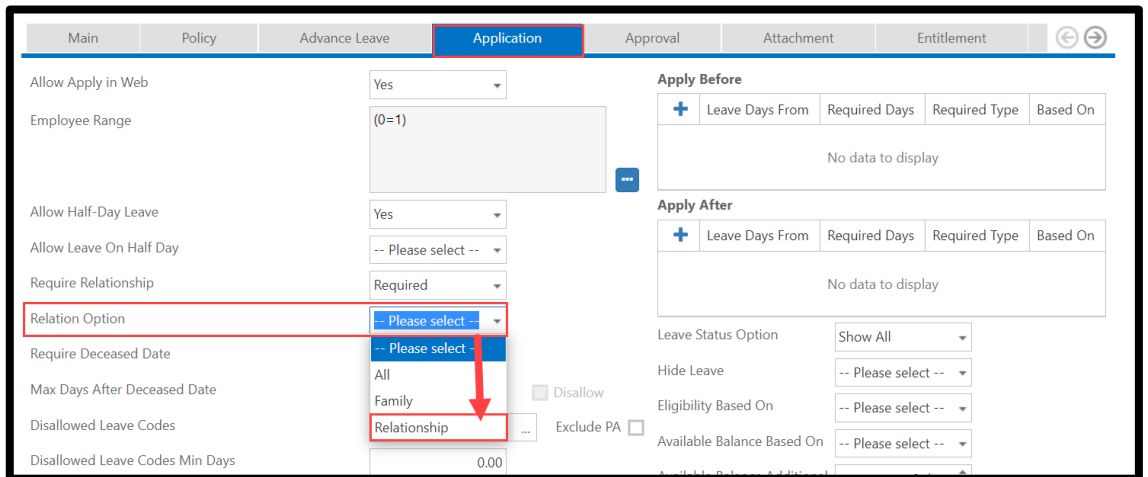
## Main Tab

**Main Tab** is used to define basic leave information, some fields once set up in the first time then it cannot be changed anymore. Example: **Code, Nature and Applicable Gender**.

Language	Name
中文简体	法定假期

1. **Code** - Code is unique and cannot contain blank spaces.  
 If the system is being used in multiple countries, it is recommended to name the leave code using the initials of the country code. For example: SGANL, PHANL, CNANL
2. **Nature** – Is a selection of pre-defined setup templates that is tied to the nature of various leaves. Some of these pre-defined setups are unique to certain leave nature, for example:
  - a. For Nature = **Annual Leave**, the **Year-End Tab** is displayed for defining the year end closing policy.
  - b. For Nature = **Medical Leave**, under the **Application Tab**, the clinic information can be setup for selection and the consultation date input.
  - c. For Nature = **Compassionate Leave**, the **Compassionate Tab** is displayed to define the entitled relationship, the number of days for each relationship.

**Note:** Best practice to set up Compassionate Leave is to set value for **Relation Option** as **Relationship** under **Application Tab** because is not auspicious to show family name under Compassionate Leave. Unless there is special requirement from client.



- d. For Nature = **Marriage Leave**, under **Application Tab**, marriage date requirement, maximum days needs to apply before/after Marriage Date, relationship requirement as well as marital status options can be set to cater to various marriage related scenarios.
- e. For Nature = **Maternity/Paternity Leave**, under **Application Tab**, clinic information, consultation date input requirement can also be setup for Maternity, child information for Paternity as well as maximum days needs to apply before/after childbirth.



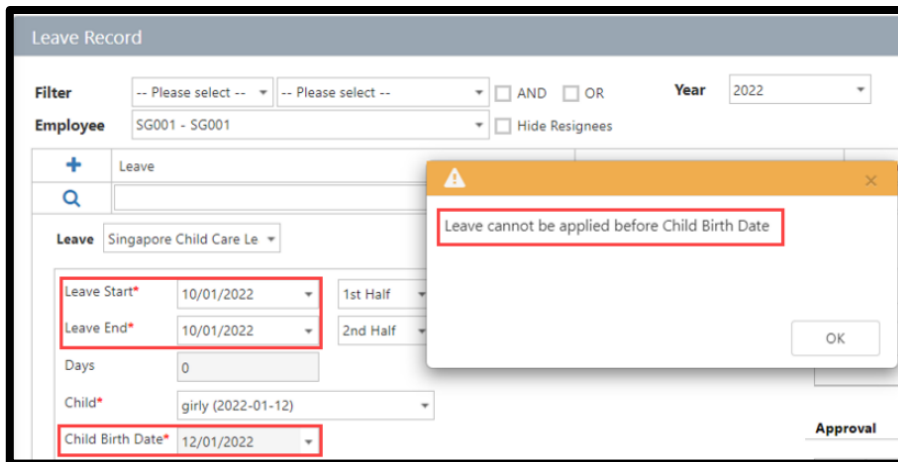
Example:

Child' Birth Date = 01 June 2022

Leave Period = 01 Jan 2022 to 31 Dec 2022

Scenario	Result
Max Days Before Child Birth Date <input type="text" value="0 days"/> <input type="checkbox"/> Disallow Max Days After Child Birth Date <input type="text" value="0 days"/> <input type="checkbox"/> Disallow	No checking on the Max Days. Employee can apply the Paternity Leave any day between 01 Jan to 31 Dec 2022.
Max Days Before Child Birth Date <input type="text" value="0 days"/> <input checked="" type="checkbox"/> Disallow Max Days After Child Birth Date <input type="text" value="0 days"/> <input checked="" type="checkbox"/> Disallow	The Max Days setting has been disabled. Employee is only allowed to apply Paternity Leave on the child's exact birth date 01 June 2022.
Max Days Before Child Birth Date <input type="text" value="2 days"/> <input checked="" type="checkbox"/> Disallow Max Days After Child Birth Date <input type="text" value="2 days"/> <input checked="" type="checkbox"/> Disallow	System will check the Max Days Before/After setting. Employee can apply the Paternity Leave between 30 May 2022 – 03 June 2022.

- f. For Nature = **Leave With Expiry**, there is setting for expiry period and expiry date in Application.
- g. For Nature = **Child Care Leave**, there is a validation to disallow leave application before the Child's Birth Date. When employee tries to apply the leave before the child's birth date, system will prompt the following error message:



- 3. **Application Gender** - Select the gender that can apply for the leave. Example, when *Male* is selected, female employees cannot view or apply this leave such as Paternity Leave.
- 4. **Unit Type** - is used to indicate the unit for leave application.
  - a. When set as **Day**, user can only apply in days.
  - b. When set as **Hour**, user can apply in hours.
- 5. **Obsolete** – Default is *No*. Set to *Yes* to disable an existing leave type.
- 6. **No** – This is the *No* to set the sequence order of leave type
- 7. **Salary Payable** – is used to indicate the deduction of work hours paid under attendance module if leave is applied.
  - a. If **Salary Payable = Yes**, system will not deduct work hours paid and will recover the *Lateness or Undertime*
  - b. If **Salary Payable = No**, system will deduct the work hours paid based on the *Hourly Leave* amount

Below is a sample illustration showing the linkage between the *Salary Payable* field in *Leave Module* and *Work Hours Paid* field in *Attendance Module*.

**Example:**

Scenario 1	Value in Work Hours Paid Field (Attendance Module)
Salary Payable = Yes	8 Hours (2 hours of lateness will be recovered because the salary payable is Yes)
Normal Hours = 8 Hours	
Lateness = 2 Hours	
Applied Hourly Leave = 2 Hours	

Scenario 2	Value in Work Hours Paid Field (Attendance Module)
Salary Payable = No	6 Hours (2 hours of lateness will be deducted from work hours paid because the salary payable is No)
Normal Hours = 8 Hours	
Lateness = 2 Hours	
Applied Hourly Leave = 2 Hours	

8. **Language** – This is to manage the display language for the leave type. System allows user to change the default language used in menus. However, if user wish to display the leave type in others language (by default is US English), there is a need to configure the setup in this field.

Below is a sample illustration showing the linkage between the language field in leave type and default language in ESS view.

Example:

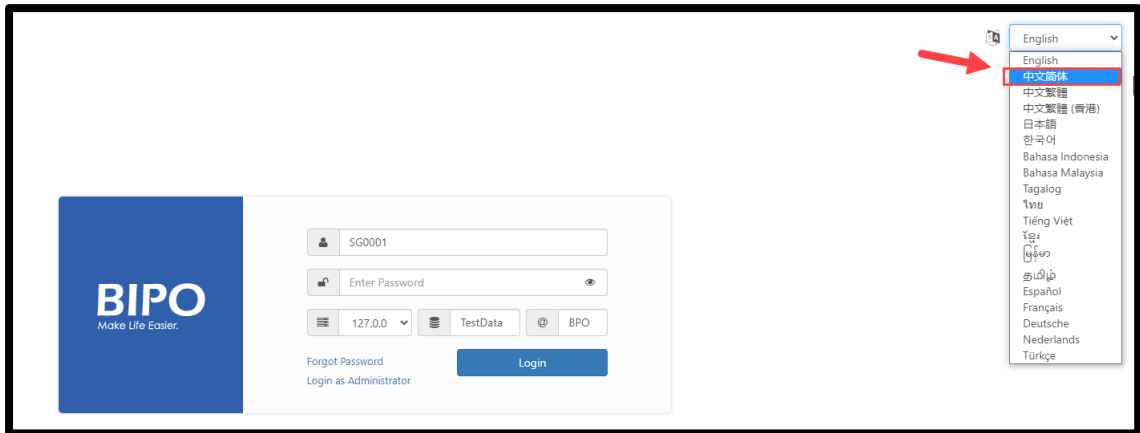
Leave Type	System Default Language	Display Language
Annual Leave	English	Annual Leave
	Chinese (Simplified) 中文简体	年假

If the language is defined in leave type as below:

The screenshot shows a configuration page for a leave type. The 'Language' table is highlighted with a red border. The table contains the following data:

Language	Name
中文简体	年假
Language	年假

When employee login system with default language in Chinese (Simplified)中文简体.



Leave type will be display in Chinese under ESS view.



**Note:** When a field has name in other language, system will display the language corresponding to user login language in [Flexible Leave Report](#).

BIPO Service  
Leave Record Report

04/04/2023 (周二) 14:15  
期间: ACTIVE. 在职记录 截至 31/12/2021.  
范围: 所有的记录

Employee Code	Employee Name	Leave Start	Leave End	Leave Code	Remarks	Half Start	Half End
SG0001				SGANL / 年假	Data Import	AM	PM
SG0002				SGANL / 年假	Data Import	AM	PM
SG0003				SGANL / 年假	Data Import	AM	PM
SG0004				SGANL / 年假	Data Import	AM	AM
SG0004				SGANL / 年假	Data Import	PM	PM
SG0005				SGANL / 年假	Data Import	PM	PM
SG0007				SGANL / 年假	Data Import	AM	PM
SG0007				SGANL / 年假	Data Import	AM	PM

9. Click **Update** button to save.

## Policy Tab

In **Policy Tab**, it is used to set leave policy information like when will leave start and how to prorate this leave.

The screenshot shows the 'Policy' configuration page for 'Statutory Annual Leave'. The 'Policy' dropdown is set to 'Anniversary / Calendar'. Other settings include 'Month Start' as 'January', 'Entitlement Type' as 'With Entitlement', and 'Proration Type' as 'By Months'. A 'Leave Proration' dropdown is open, showing options like 'DEFAULT - Default', 'CN\_Default - CN\_Default', etc. An arrow points from the 'Leave Proration' dropdown to a 'set in another page' button.

1. **Policy** - to set up the leave calculation rules. *Anniversary* represents the anniversary (365 days) of the join date and *Calendar* represents the natural year, that is leave will calculate from 1<sup>st</sup> of January until 31<sup>st</sup> of December.

a. **Anniversary/Anniversary - Earned Leave** computation is based on *Date Join* as effective date and cut-off date. System will read:

- The first word Anniversary before the slash as the time range for leave entitlement.

- The second word Anniversary after the slash as the time range for leave earned
- b. **Anniversary / Calendar** – Earned Leave computation is based on *Date Join* and *Calendar Date* = 31st December, as effective date and cut-off date.
- c. **Calendar / Calendar** - Earned Leave computation is based on *Calendar Date* as effective date and cut-off date.

Calculations for Leave Policy

The following example will be used to explain the various leave policy that can be applied:

Employee’s join date is 1 Feb 2021
First year entitlement= 12 days
Second year entitlement= 14 days
Proration Type = By Months

a. **For Anniversary / Anniversary Policy:**

Earned Leave computation is based on **Date Join** as effective date and cut-off date.

Date Join = 01 Feb 2021
1st year entitlement = 12 days
2nd year entitlement = 14 days

A/A policy	year 2021			year 2022			year 2023			
	Jan	Feb	Dec	Jan	Feb	Dec	Jan	Feb	Dec	
1st year entitlement										
1st year earned										
2nd year entitlement										
2nd year earned										

Earned leave in each year is as follows:

**2021**

1 Feb 2021 – 31 Jan 2022 = 12 days

**2022**

1 Feb 2022 – 31 Jan 2023 = 14 days

b. **For Anniversary / Calendar Policy:**

Earned Leave computation is based on **Date Join and Calendar Date = 31<sup>st</sup> December**, as effective date and cut-off date.

Date Join = 01 Feb 2021  
 1st year entitlement = 12 days  
 2nd year entitlement = 14 days

A/C policy	year 2021			year 2022			year 2023			year 2024	
	Jan	Feb	Dec	Jan	Feb	Dec	Jan	Feb	Dec	Jan	Feb
1st year entitlement :											
1st year earned											
2nd year entitlement :											
2nd year earned											
3rd year entitlement :											
3rd year earned											

Earned leave in each year is as follows:

2021

1 Feb 2021 – 31 Dec 2021 is 11 months out of 12 months.

- Compute as follows:  $[(11/12)*12 \text{ days}] = 11 \text{ days}$

2022

1 Jan 2022 – 31 Jan 2022 = 1 month

- Compute as follows:  $[(01/12)*12 \text{ days}] = 1 \text{ days}$
- 1 Feb 2022 – 31 Dec 2022 is 11 months out of 12 months.
- Compute as follows:  $[(11/12)*14 \text{ days}] = 12.83 \text{ days}$

Total 2022 earned leave = 1+12.83 = **13.83 days**

**Note:** Due to proration between *Anniversary Date* and *Calendar Date*, the total earned for 2<sup>nd</sup> year will not be the full 14 days.

2023

1 Jan 2023 – 31 Jan 2023 = 1 month

- Compute as follows:  $[(01/12)*14 \text{ days}] = 1.17 \text{ days}$
- 1 Feb 2023 – 31 Dec 2023 is 11 months out of 12 months.
- Compute as follows:  $[(11/12)*14 \text{ days}] = 12.83 \text{ days}$

Total 2023 earned leave = 14 days

**For Calendar / Calendar Policy:**

Earned Leave computation is based on **Calendar Date** as effective date and cut-off date.

Date Join = 01 Feb 2021  
 1st year entitlement = 12 days  
 2nd year entitlement = 14 days

C/C policy	year 2021			year 2022			year 2023		
	Jan	Feb	Dec	Jan	Feb	Dec	Jan	Feb	Dec
1st year entitlement :									
1st year earned									
2nd year entitlement :									
2nd year earned									

Earned leave in each year is as follows:

2021

1 Feb 2021 – 31 Dec 2021 = 11 days (Proration based on *Join Date*)

2022

1 Jan 2022 – 31 Dec 2022 = 14 days

2. **Anniversary Period Based On** – This field will only appear when **Policy** field set as **Anniversary/Anniversary** or **Anniversary/Calendar**, select from:

- a. Join Date
- b. Join Date for Leave

**Scenario 1: Join Date for Leave different to Join Date**

	Employee Information
Join Date	1/02/2022
Join Date for Leave	1/07/2022

Anniversary Period Based On	Leave Period
Join Date	01/02/2022 to 31/01/2023
Join Date for Leave	01/07/2022 to 30/06/2023

**Scenario 2: Join Date for Leave Blank or same as Join Date**

	Employee Information
Join Date	1/02/2022
Join Date for Leave	Blank/same as Join Date

Anniversary Period Based On	Leave Period
Join Date	01/02/2022 to 31/01/2023
Join Date for Leave	01/02/2022 to 31/01/2023

3. **Entitlement Type** - is used to define if there is a quota limit when setting up the calculation of entitlement.

- a. **Leave With Entitlement** (i.e. *Annual Leave, Sick Leave, Maternity Leave, Hospitalization Leave*).
- b. **Leave Without Entitlement** (i.e. *Unpaid Leave, Business Trip Leave, Leave with Expiry*).

4. **Proration Type** - to set up the proration method of leave entitlement calculation for new joiners and resign staff.

a. **By Months** - means earn leave based on the month's cut off day defined.

*Example:*

- Total entitlement = 12 days
- Current month = June
- Entitlement prorated by months:  $(6/12 \text{ months}) * 12 \text{ days} = 6 \text{ days}$

b. **By Days** - means 365 days, it will calculate entitlement by service days/ 365 days.

*Example:*

- Total entitlement = 12 days
- Current month = 15<sup>th</sup> June
- Entitlement prorated by days:  $(167 \text{ days (1 Jan – 15 Jun)})/365 \text{ days} * 12 \text{ days} = 5.50 \text{ days (based on rounding settings)}$

5. **Earn Type** - Calculates the number of earn days when leave processing is done.

a. **Up to Full Year** - means a full-year leave is earned, regardless of the leave process date value when performing leave processing.

b. **Up To Processing Date** - means entitlement will calculate up to the leave process date value when processing the leave.

**Note:** *Earn Type* calculation results will respect the *Proration Type* settings.

6. **Leave Days Based On** - to define if leave application days only based on *Working days*, *Calendar days*, *Working days (exclude Holidays)* or *Calendar days (exclude Holidays)*.

7. **Service Year Based On** - to calculate the service year for leave entitlement, this value will refer to the *Entitlement Tab*. The following date fields require date values to be entered:

a. *Join Date* – system will refer to the employee *Join Date* in *Personnel Module*

**Access:** *Personnel Module > Personnel > Employee > Employment page > Join Date*

b. *Initial Join Date* - system will refer to the employee's *Initial Join Date* field in *Personnel Module*

**Access: Personnel Module > Personnel > Employee > Employment page > Initial Join Date**

c. *Promotion Date* - This is to allow system to capture the leave entitlement based on *Leave Grade Start Date* which coincide with *Promotion Date*

**Access: Personnel Module > Personnel > Employee > Assignment page > Leave Grade Start Date**

Earn Type: Up To Processing Date

Leave Days Based On: Working Days (Exclude Holiday)

Service Year Based On: Promotion Date

Service Year based on 1st day of Period Start Year

Assignment | Statutory | Salary | Allowance | Attendance | Edu

Leave Grade

Date Start\*: 01/01/2020

Leave Grade: ACCT\_Leave1 - ACCT Leave Grade 1 - For Senior Managers

Last Update By: hrm - 17/10/2022 (Mon) 14:56:20

- d. *First Work Date* – System will adhere to the *First Work Date* field set in employee’s *Employment tab* page.

**Access:** *Personnel Module > Personnel > Employee > Employment page > First Work Date*

Leave Days Based On: Working Days (Exclude Holiday)

Service Year Based On: First Work Date

Employment | Contract | Assignment | App

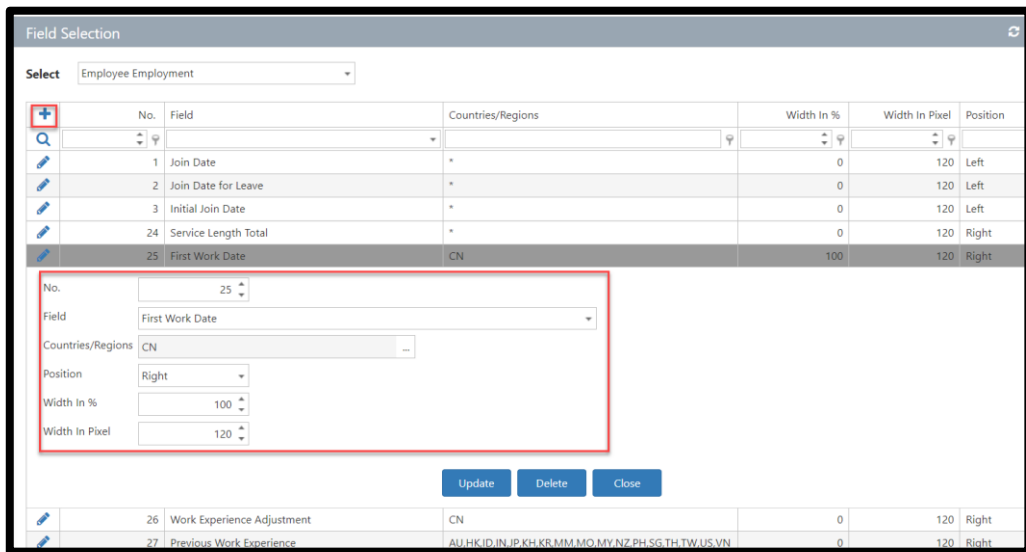
Service Length Adjustment: 0 yrs 00 m

LOA Days: /

Service Length Total: 0 yrs 01 mths

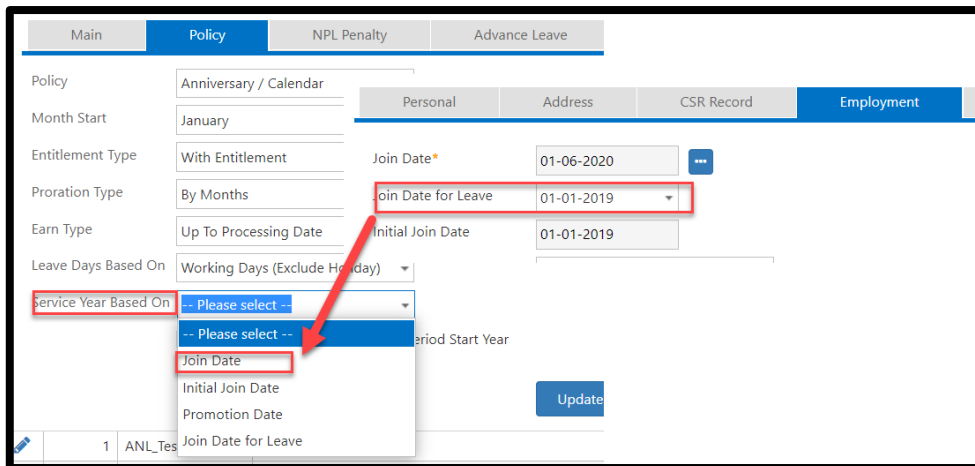
First Work Date: 03/02/2023

**Note:** This field is not default and need to be configured into the *Employment tab* through *Field Selection Menu*.



- e. *Join Date for Leave* – this refers to the *Join Date for Leave* field in Personnel’s Employment tab where system will follow this date in the event the *Service Year Based On = Join Date*.

**Access:** *Personnel Module > Personnel > Employee > Employment page > Join Date for Leave*



**Note:** *Service Year Based On will connect to Entitlement tab.*

8. **Leave Proration** – (Optional) This field is used to compute the proration for new joiner, resignee or existing employees with service year / leave grade update. Proration policy is created in *Leave Module > Reference > Proration*. Upon creating, it will be available as a selection. If *Proration Type* field is defined as *None*, this field can be undefined. For more information on setting proration, please refer [to Create Leave Proration](#).

9. **Leave Rounding** – (Optional) Rounding policy is created in *Leave Module* > *Reference* > *Rounding*. Upon creating, it will be available as a selection. *Leave Rounding* field is defined as *None*, this field can be undefined. For more information on setting proration, please refer to [Create Leave Rounding](#).
10. **Rounding For Forfeiture** – (Optional) This field is similar with *Leave Rounding* field and only applicable for carry forward leave.
11. **Rounding For Encashment** – (Optional) This field is similar with *Leave Rounding* field and only applicable for carry forward leave.
12. **Entitlement Multiplier** – This field will convert entitlement days to hours by multiplying with the value set in the entitlement multiplier field. This field is used when the following prerequisites is met:

a. **Unit Type** = Hours

Main	Policy	Advance L
Code	ANL	
Name	Annual Leave	
Nature	ANL - Annual Leave	
Applicable Gender	All	
Unit Type	Hours	
Obsolete	No	

b. **Proration Type** = By Days

Main	Policy	Advance Leave
Policy	Anniversary / Calendar	
Month Start	January	
Entitlement Type	With Entitlement	
Proration Type	By Days	
Earn Type	Up To Processing Date	
Leave Days Based On	Working Days (Exclude Holiday)	
Service Year Based On	Join Date	

When *Entitlement Multiplier* is set to 8:

Entitlement Multiplier	8.00
------------------------	------

The total Leave Earned/Entitlement will be converted to hours by multiplying with the multiplier variable above.

Example: If the total leave earned is equal to 9 days, the actual total earned shown in *Leave Status* will be 72 hours ( $9 * 8 = 72$  hours)

Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	Pending Ap
CN_ANL_TOT	Annual Leave		Hours	0.00	0.00	72.00	0.00	0.00		72.00	
Last Year Balance				0.00		Next Year Advance				0.00	
Carry Forward				0.00		Next Year Taken				0.00	
Carry Forward Expiry						Next Year Pending Approval				0.00	
Carry Forward Taken				0.00		Period Start				01/01/2017	
Earned				72.00		Period End				31/12/2017	
				209/365*12 = 9*8 hours = 72 hours		Date Process				29/12/2017	
Additional Earned				0.00		Entitlement				96.00	
Taken				0.00						365/365*12 = 12*8 hours = 96 hours	
Adjustment Taken				0.00		Forfeiture				0.00	
Adjustment Remarks						Encashment				0.00	

## Advance Leave Tab

In **Advance Leave Tab**, it is used to set whether leave can be applied in advance. This configuration is used in annual leave to allow their employees to apply leave in the next year/period (utilizing next year/period's leave entitlement) prior to leave closing. This tab is not the mandatory field to maintain.

1. **Current Advance Entitlement** – set the current calculation type for current advance leave entitlement (*Full Year Entitlement, Earn Leave, {0} months*). **Note {0} months** is used only when the *Earn Type = Up To Processing Date*.
2. **Current Advance Months** - set the number of advance months that can be applied

in advance (this setting is for {0} months defined in **Current Advance Entitlement**).

Example:

Current month = March 2022

Full year entitlement = 12

Earn Type = Up to processing date

Current Advanced Entitlement = {0} months

Current Advanced Months = 3

Employee is able to apply up to 3 days of leave in advance by utilizing the leave entitled for April, May and June.

3. **Current Advance Additional** - set additional number of days (on top of the *Current Advance Months* entitled) that can currently be applied.
4. **Next Advance Entitlement** - set the calculation type for next period or next anniversary's advance leave entitlement. This is to allow employee to apply leave for next year in advance.
5. **Next Advance Months** – set the number of advance months to use for the next anniversary. set the number of next year's advance months that can be applied in advance for next year (this setting is for {0} months defined in **Next Advance Entitlement**).

Example:

Current month = November 2022

Full year entitlement = 12 (based on year 2022)

Earn Type = Up to processing date (in this case, entitlement for 2023 is has not been processed, system will be based on 2022 entitlement calculation)

Next Advanced Entitlement = {0} months

Next Advanced Months = 3

If employee would like to apply up to 3 days for January 2023, they can do so in advance by utilizing the leave entitlement for 2023. The leave will be deducted from 2023 entitlement.

6. **Next Advance Additional** - set an additional number of days that can be taken for the next anniversary.

**Note:** For more description on the *Advance Setting*, please refer to [Advance Leave \(Next Period Setting\)](#)

- Allow next year advance leave to be taken this year** - this field is to allow employee to apply leave for current year/period by utilizing the entitlement from next year/period.
- Next Advance This Year:** The first field is to key in the value. The second field is to select the calculation unit, *Amount* or *Percentage*.

Example:

1<sup>st</sup> Field = 2

2<sup>nd</sup> Field = Amount

This setting allows the employee to apply leave this year/anniversary using next year/anniversary's entitlement. Approved leave will be deducting next year's entitlement.

Allow next year advance leave to be taken this year  
 Next Advance This Year

## Application Tab

**Application Tab** is used to define the leave application practice.

- Allow Apply in Web & Employee Range** - this is to control the range of user who can view and apply this leave in *ESS (Employee Self Service)*. User cannot apply leave

if he/she is not defined in the range.

[Click here](#) to refer on how to set the *Employee Range*.

2. **Allow half-day leave** - when set this field as **Yes** and leave unit type is **Day**, then user can apply leave for half day (1<sup>st</sup> half or 2<sup>nd</sup>half) on a full day shift.

Day No	Shift	Day Weight
1	0900-1800 - 9am to 6pm	1.00
2	0900-1800 - 9am to 6pm	1.00
3	0900-1800 - 9am to 6pm	1.00
4	0900-1800 - 9am to 6pm	1.00
5	0900-1800 - 9am to 6pm	1.00
6	0900-1300 - 9am to 1pm	0.50
7	REST - REST	0.00

3. **Allow Leave On Half Day** – use to determine how half day leave is deducted for leave applied on a half day shift.

Day No	Shift	Day Weight
1	0900-1800 - 9am to 6pm	1.00
2	0900-1800 - 9am to 6pm	1.00
3	0900-1800 - 9am to 6pm	1.00
4	0900-1800 - 9am to 6pm	1.00
5	0900-1800 - 9am to 6pm	1.00
6	0900-1300 - 9am to 1pm	0.50
7	REST - REST	0.00

- a. **Yes (deduct 1 day)** - it means when user apply leave on a half day shift, it will deduct 1 day from entitlement.
- b. **Yes (deduct 0.5 day)** - it means when user apply leave on a half day shift, it will deduct 0.5 day from entitlement.
- c. **No** - it means no leave is allowed on a half day shift.

4. **Skip Validation of Min Block Hours for Resignee** - This field will only display when leave unit is hour. When value set as Yes, system will skip the validation on Min Block Hours setup.
5. **Disallowed Leave Codes** - this is to control when another leave has entitlement, then user cannot apply this leave. This is usually used for annual leave and no pay leave. If the rule is user can only apply no pay leave until annual leave's balance is 0. Then can set "annual leave" in Disallowed Leave Codes of no pay leave.
6. **Exclude PA** – Default is not tick. If ticked, the system will not allow user to submit the application until disallowed leave code balance in Leave Status is 0.
7. **Disallowed Leave Codes Min Days** - this is connected to **Disallowed Leave Codes**. If set **annual leave** in *Disallowed Leave Codes* of no pay leave, and *Disallowed Leave Codes Min Days* is 3 days, which means user cannot apply no pay leave when annual leave's balance is larger than (or equal to) 3 days. When annual leave only has 2 days, then user can apply no pay leave.
8. **Disallowed Leave Codes Multiple** - this parameter allows for *combined* or *separate* checking of the leave balance of multiple disallowed leave code selected in *Disallowed Leave Codes* field.
9. **Skip Validation of Disallowed Leave Codes for Resignee** - This field will display when leave unit is day or hour. When value set as Yes, system will exclude resignees from the *Disallowed Leave* policy.
10. **Associated Time-Off Leave** – This field will only available for leave type with *Unit Type = Hour*. This field for user to select which hourly leave to associate with the daily leave.
11. **Time-Off Conversion Based On** – This field used to determine how *Hourly Leave* will be converted to *Daily Leave*. (Use in association with *Associated Time-Off Leave*)
  - a. **System Config** – based on *System Config's TimeOffConversionHours* and *TimeOffConversionDays* value using formula below:
 
$$\text{Amount of Daily Leave} = \frac{\text{Amount of Associated TimeOff Leave} * \text{TimeOff Conversion Days}}{\text{TimeOff Conversion Hours}}$$
  - b. **Leave Master** – based on *Daily Leave's Time-Off Conversion Hours* and *Time Off Conversion Days* value using formula below:

$$\text{Amount of Daily Leave} = \frac{\text{Amount of Associated TimeOff Leave} * \text{TimeOff Conversion Days}}{\text{TimeOff Conversion Hours}}$$

- c. **Employee Work Hours Per Day** – based on *Employee Master’s Work Hours Per Day* value using formula:

$$\text{Amount of Daily Leave} = \frac{\text{Amount of Associated TimeOff Leave}}{\text{Work Hours Per Day}}$$

12. **Time-Off Conversion Deduction Type** – determine when *Time-Off Taken* will be stamped in *Daily Leave*.

- a. **Immediately** – *Amount of Time-Off* taken will be showed right after leave application.
- b. **Accumulative Basis** – *Amount of Time-off* taken will be showed after accumulated hourly leave equal or greater than multiple of *Time-off Conversion Days*.
- c. **Accumulative Advance Deduction** - *Amount of Time-off* taken will be showed after accumulated hourly leave with advance deduction.

13. **Validate With Shift** – This field will only be enabled when **Leave Unit Type = Hours**.

Select from:

- a) **Normal Hours** – This is the system default value. Employees can apply hour leave any time between shift hours.
- b) **Shift Time Start and Time End** – Employees only allow to submit leave when leave time start equal to shift time start or leave time end equal to shift time end.
- c) **Leave Time Start and Time End** – System will compute the hours that are out of the shift range.

Example:

Shift: 09:00 to 18:00

Time Start: 15:00

Time End: 19:00

Leave Hours: 4

18:00 to 19:00 is out of the shift range. However, the system will still count this 1 hour as part of the total hours.

14. **Apply Before & Apply After** - This is to set how many days user need to apply in

advance.

To set user can only apply leave 2 days in advance, then you can follow below steps:  
Set *Leave Days From* as 0 (this means when user apply this leave larger than 0 days, it will follow this rule).

- a. Set **Required Days** as 2 days (this means user need to apply 2 days in advance).
- b. Set **Required Type** as **working days** (this means 2 days in advance will skip off-day and rest days, only calculate working days).
- c. Set **Based On** (this means which date to calculate 2 working days, from leave start date or leave end date).

15. **Leave Status Option** – Allow user to decide whether to display leave balance in Leave Status under ESS view. (leave without entitlement commonly will set this field as **Hide Balance**)

When **Leave Status Option** set as **Hide Balance**, fields as below in **Leave Status** will shown as - .

- a. C/F
- b. Earned
- c. Balance
- d. Forfeited
- e. Prior Year Carry Forward
- f. Exit Forfeited
- g. Last Year Forfeited

Adjustment Taken	Adjustment Remarks	Balance	Pending Approval	Forfeited	Prior Year Carry Forward	Exit Forfeited	Last Year Forfeited
0.00		-	0.00	-	-	-	-

16. **Hide Leave** - When Hide Leave is set to **Yes**, the leave type will be hidden in ESS Leave Status screen. When Hide Leave is -- **Please select** -- or **No**, the leave type will be shown in ESS Leave Status screen.

17. **Available Balance Based On** - this will calculate the entitlement user can apply based on **Apply Date** or **Leave Date**.

18. **Submission Message** - user can view this message in apply leave screen.

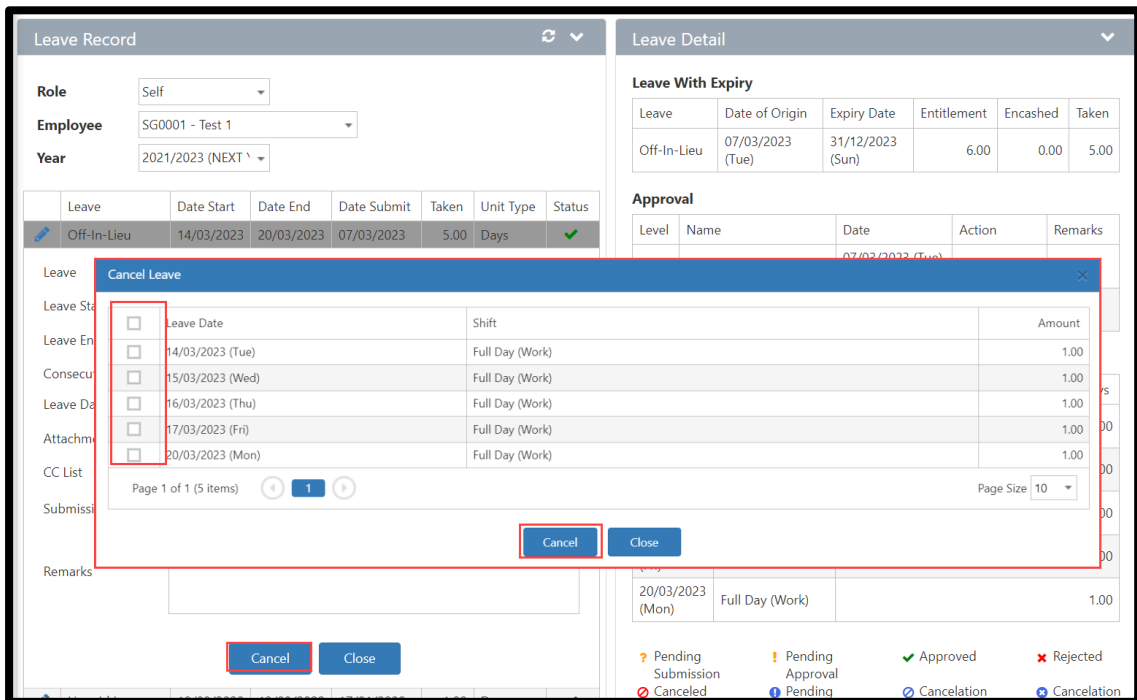
## Approval Tab

In **Approval Tab**, it can control the approval and cancellation policy.

1. **Require Approval** - if set **No**, then this leave will be auto approved without any workflow.
2. **Allow Cancellation** – select
  - **No** - user are not allowed to cancel his/her leave application.
  - **Yes** - additional field **Allow Day After** will be enabled.
3. **Allow Partial Cancellation** – If this field is set to **Yes**, system allow employee to cancel partial of the consecutive leave applied.

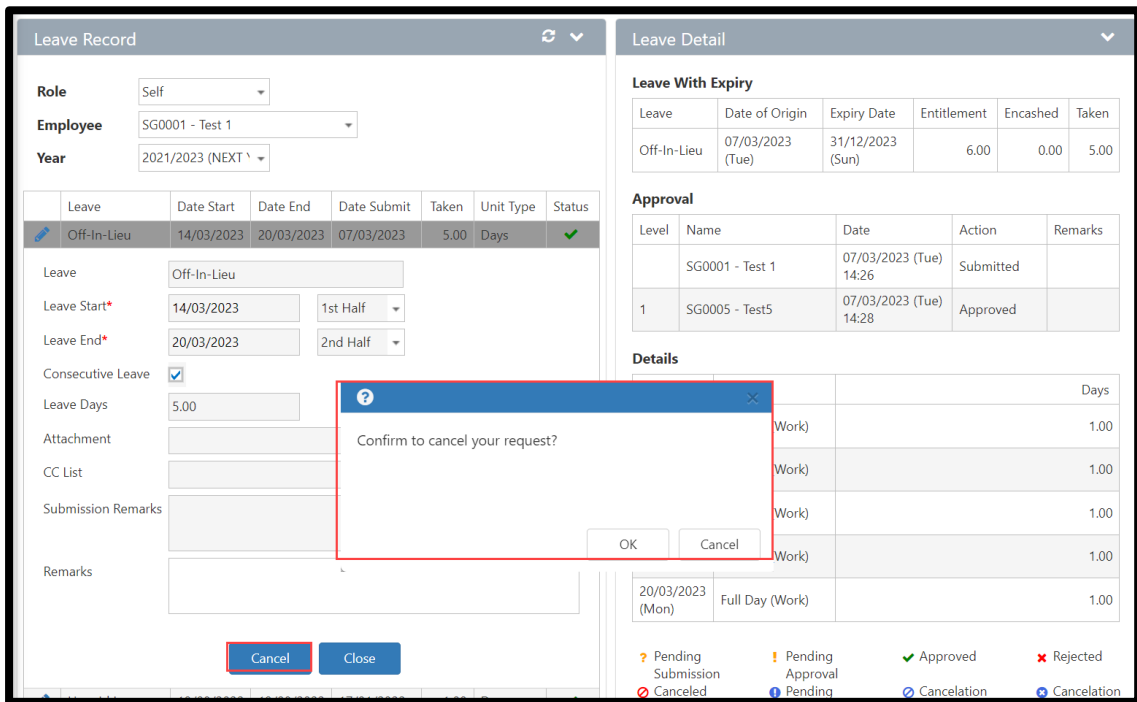
**Scenario 1:** Employee applied leave consecutively for 5 days and **Allow Partial Cancellation** is set to **Yes**. Employee is allowed to cancel partial i.e., 3 days.

When employee click **Cancel** button in Leave Record, system will have a pop out screen with checkbox that allow employee to select specific date for partial cancellation.



**Scenario 2:** Employee applied leave consecutively for 5 days and **Allow Partial Cancellation** is set to **No**. Employee is only allowed to cancel 5 days leave instead of cancel partial leave.

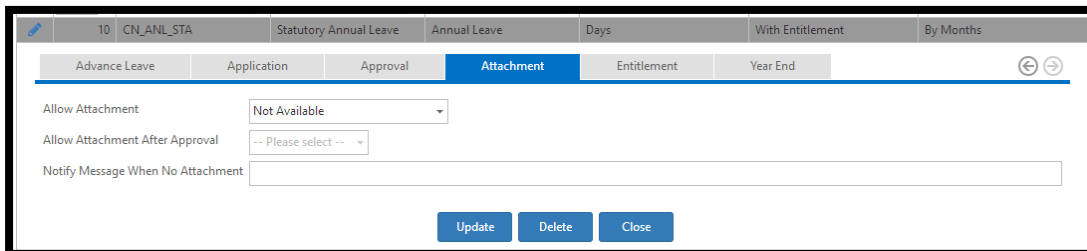
When employee click **Cancel** button in Leave Record, system will only pop out an alert message to confirm on the cancellation without allow employee to select specific date of cancellation.



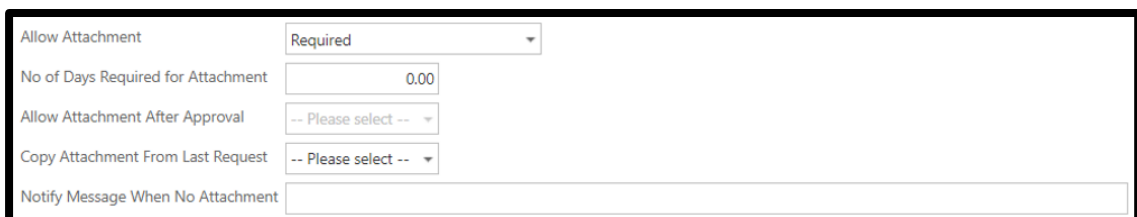
4. **Require Remarks** - if set **Yes**, then user need to fill remarks in apply screen, he/she cannot submit application without remarks.

## Attachment Tab

In **Attachment Tab**, can be used to define whether user need to upload attachment when apply leave.



1. **Allow Attachment** - there are a few options and fields will display accordingly.
  - a. **Required** - User must upload attachment when apply leave, and the attachment upload is displayed. The following fields will be enabled for setup.



- b. **Required When Past Date** – commonly used in sick leave scenario, which means

if user apply leave in advance, then attachment is optional. When user apply past dated leave, attachment is mandatory. The following fields will be displayed for setup.

Allow Attachment	Required When Past Date
No of Days Required for Attachment	0.00
Allow Attachment After Approval	-- Please select --
Copy Attachment From Last Request	-- Please select --
Notify Message When No Attachment	

- c. **Optional** - Attachment upload bar is enabled in ESS view and upload is optional when employee apply for leave. The following fields will be displayed for setup.

Allow Attachment	Optional
Allow Attachment After Approval	-- Please select --
Copy Attachment From Last Request	-- Please select --
Notify Message When No Attachment	

- d. **Not Available** - No attachment upload is displayed and user cannot upload attachment. The following fields will be displayed for setup.

Allow Attachment	Not Available
Allow Attachment After Approval	-- Please select --
Notify Message When No Attachment	

- e. **Compulsory (can be deferred)** - User may upload attachment after leave application is submitted. The following fields will be displayed for setup.

Allow Attachment	Compulsory (can be deferred)
No of Days Required for Attachment	0.00
Allow Attachment After Approval	-- Please select --
Copy Attachment From Last Request	-- Please select --
Notify Message When No Attachment	

- c. **No of days required for attachment** - This field only enable when **Allow Attachment field** is *Compulsory, Required, Required when past date* or *Optional*. This is used to define the condition of how many days if attachments are required to be uploaded. Example: If set to 3 days, this means when user apply leave equal or more than 3 days then attachment is mandatory.
- d. **Notify Message When No Attachment** - This field only enable when **Allow Attachment field** is *Compulsory, Required, Required when past date* or *Optional*. Alert message can be configured in this field if employee apply leave without

attachment.

## Entitlement Tab

In **Entitlement Tab**, setup the entitlement policy of users.

1. **Year No** - this field is connected with **Service Year Based On** in **Policy** tab. (0 means from the first year, 1 means from second year).
2. **Leave Grades** – define the leave grades that will follow the entitlement rules. System default value is all leave grades.
3. **Requirement Type** – Define when user can start applying this leave.
4. **Requirement Period** -  
Example:
  - a. If set **Requirement Type** as **Period**, and set **Requirement Period** as **1 month**, that means user can only use this leave after join company for 1 month.
  - b. If set **Requirement Type** to **Confirmed and Period**, and set **Requirement Period** to **1 month**, that means user can only use this leave when they are confirmed and after join company for 1 month.
  - c. If set **Requirement Type** as **Immediate** and set **Requirement Period** as **N/A**, that means user can use this leave after join company immediately.
5. **Entitlement** – Input the number of entitlement days.
6. **Max Carry Forward** - Indicate the number of days that can be carried over to next year. This setting is used together with the **Carry Forward Policy** field set under **Year End tab**.

7. **Max Encashment** – Define the maximum number of days that employees can be encashed.
8. **Max Exit Encashment** - Allow user to set the maximum number of days for exit encashment.
  - a. When Max Exit Encashment is set to 0, system will not cap the maximum number of days for the exit encashment. All leave balance will be interfaced to payroll during exit encashment interface.
  - b. When Max Exit Encashment is set to a specific number, system will cap the maximum number of days for the exit encashment to the value set.
9. **Max Day Rate** – Setup is linked to customization of Payroll Interface > Encashment of Leave.
10. **Sequence No** – Input number to indicate sequence order. Default value is “0”.
11. **Min Per Time** - Input the min days or hours user can apply for one time.
12. **Tick to auto populate** – If this checkbox is ticked, when user select the **Leave Start** during leave application, system will auto calculate **Leave End** with formula:  
Leave End = Leave Start + Min Per Time
13. **Max Per Time** – Input the max days or hours user can apply for one time.
14. **Max Per Week** – Set the max number of days application per week.
15. **Day Start Of Week** – Select the day of week used as reference to *Max per Week* value.
16. **Max Per Month** – Set the max number of days application per month.
17. **Max No.of Times per Month** – Set the max number of times per month user can apply the leave.
18. **Max No.of Times per Year** – Set the max number of times per year user can apply the leave.
19. **Min Consecutive Days** - Set this if consecutive days of leave application is checked. *Leave Record* will display a Consecutive Leave checkbox as below screenshot.

The screenshot shows a web-based form titled "Apply Leave". At the top, there are three dropdown menus: "Role" set to "Self", "Employee" set to "SG0001 - Test 1", and "Apply Leave" set to "Off-In-Lieu". Below these are two rows of date and time selection: "Leave Start\*" with a date picker and "1st Half" dropdown, and "Leave End\*" with a date picker and "2nd Half" dropdown. A "Consecutive Leave" checkbox is present and is highlighted with a red box. Below this is a "Leave Days" input field containing the number "0". There are also fields for "Attachment" and "CC List", each with a three-dot menu icon. A "Remarks" text area is at the bottom of the form. A blue "Calculate Days" button is located at the bottom center of the form.

20. **Employee Range** - Define the employees that will be eligible for this entitlement. Setting method is the same as other modules. *Employee Range's* default value is (0=0), which means for all employees.

[Click here](#) to refer on how to set the *Employee Range*.

#### Entitlement Setup Example 1

If this leave will have 12 days' entitlement for leave grade A; 14 days' entitlement for leave grade B; then can set 2 entitlements in leave master as below:

The screenshot displays two examples of leave entitlement setup in a software interface. The top example shows a configuration for leave grade HKD12-16\_8,0hrs with an entitlement of 12.00 days. The bottom example shows a configuration for leave grade HKD14-18\_7,0hrs with an entitlement of 14.00 days. Both examples have their 'Leave Grades', 'Entitlement', and 'Employee Range' fields highlighted with red boxes.

Year No	Leave Grades	Seq No.	Employee Range	Requirement Type	Requirement Period	Entitlement	Max Per Time
0	HKD12-16_8,0hrs	0		Immediate	N/A	12.00	0.00
0	HKD14-18_7,0hrs	0		Immediate	N/A	14.00	0.00

### Entitlement Setup Example 2

When employee need to change entitlement from 12 days to 14 days, it only needs to change employee's leave grade in Employee Master > Employee > Assignment Tab, then employee's entitlement will update to 14 days.

This entitlement can calculate based on Leave Grade's start date:

- a. 2019-01-01: leave grade A
- b. 2019-07-01: leave grade B

Then employee's entitlement will be  $(12/12*6) + (14/12*6) = 13$  days.

The screenshot shows the 'Assignment' tab in the Employee Master interface. The 'Leave Grade' field is highlighted with a red box and is set to 'HKD10\_8,0hrs - Contract Staff'. The 'Date Start' is set to '01/07/2019'. Other fields like 'Org Structure', 'Company', 'Stream', 'Sub-stream', and 'Department' are also visible but not highlighted.

### Entitlement Setup Example 3

If this leave will have 12 days' entitlement for country A; 14 days' entitlement for

country B; then can set 2 entitlements in leave master as below:

The screenshot displays a software interface for configuring leave entitlements. It features a table with columns: Year No, Leave Grades, Seq No, Employee Range, Requirement Type, Requirement Period, Entitlement, and Max Per Time. Below the table are two detailed configuration panels, one for each row.

Year No	Leave Grades	Seq No	Employee Range	Requirement Type	Requirement Period	Entitlement	Max Per Time
0	*	0	((TblEmployee.CountryCode='CN'))	Immediate	N/A	14.00	0.00
0	*	0	((TblEmployee.CountryCode='SG'))	Immediate	N/A	12.00	0.00

Each configuration panel includes the following fields:

- Year No: 0
- Leave Grades: \*
- Requirement Type: Immediate
- Requirement Period: N/A
- Entitlement: 14.00 (for CN) / 12.00 (for SG)
- Max Carry Forward: 0.00
- Max Encashment: 0.00
- Sequence No.: 0
- Employee Range: ((TblEmployee.CountryCode='CN')) / ((TblEmployee.CountryCode='SG'))
- Min Per Time: 0.00
- Max Per Time: 0.00
- Max Per Week: 0.00
- Day Start Of Week: Sunday
- Max Per Month: 0.00
- Max No of Time Per Month: 0
- Max No of Time Per Period: 0
- Min Consecutive Days: 0.00

When employee need to change entitlement from 12 days to 14 days, it needs to change employee's country/region from CN to SG. Then employee's entitlement will change to 14 and will do proration like leave grade.

## Special Tab - Year End Tab (Annual Leave)

In **Year End Tab**, it can set carry forward rules to take leave to next year. Commonly used for annual leave.

The screenshot displays a software interface for configuring annual leave carry forward rules. The 'Year End' tab is active, showing a form with the following fields:

- Leave Grades:** A dropdown menu with a search icon and a plus sign.
- Carry Forward Policy:** A dropdown menu currently showing "-- Please select --".
- Carry Forward Percentage:** A text input field containing "0.00".
- Carry Forward Expiry:** Two spinner boxes, one for "Months" (set to 0) and one for "Days" (set to 0).
- Excess Policy:** A dropdown menu currently showing "-- Please select --".
- Employee Range:** A text input field containing "(0-0)".

At the bottom of the form, there are two buttons: "Update" and "Close".

1. **Leave Grades** – Select *Leave Grade* that applicable with the carry forward rules.
2. **Carry Forward Policy** – this field is used to determine the carry forward calculation rule which the system will be based upon when calculating the carry forward amount.

**Note:** This field is used in conjunction with **Carry Forward Percentage** field to determine the actual amount/percentage of the carry forward.

- a. **Leave Balance** – System will carry forward all leave balance from previous year, which includes all balance entitlement, leave in lieu, carry forward from previous years (depending on the carry forward forfeiture policy) and etc.
- b. **Full Year Entitlement** – System will carry forward based on the balance of full year entitlement.

Example:

Entitlement = 14 (balance as of year/anniversary period end)

Carry Forward Policy = Full Year Entitlement & Carry Forward % = 50

Carry Forward Entitlement = 7

- c. **Max Carry Forward** – System will carry forward balance based on the value set in *Maximum Carry Forward* field set in *Entitlement Tab*.

Main	Policy	Advance Leave	Application	Approval	Attachment	Entitlement	Year End
+	Year No	Leave Grades	Seq No.	Employee Range	Requirement Type	Requirement Period	Entitlement
	0	*	0	((TblEmployee.CompanyCode='ABC'))	Immediate	N/A	12.00
	0	ACCT_Leave1,	0	(0=0)	Immediate	N/A	12.00

Year No	0	Min Per Time	0.00	<input type="checkbox"/> Tick to auto populate
Leave Grades	ACCT_Leave1	Max Per Time	0.00	
Requirement Type	Immediate	Max Per Week	0.00	
Requirement Period	N/A	Day Start of Week	Sunday	
Entitlement	14.00	Max Per Month	0.00	
Max Carry Forward	7.00	Max No of Times per Month	0	
Max Encashment	0.00	Max No of Times per Year	0	

Example:

Entitlement = 14 & Max Carry Forward = 7

Carry Forward Policy = Max Carry Forward & Carry Forward % = undefined

Carry Forward Entitlement = 7 or whichever balance is lower.

Entitlement = 14 & Max Carry Forward = 7

Carry Forward Policy = Max Carry Forward & Carry Forward % = 50

Carry Forward Entitlement = 3.5 or whichever balance is lower.

- d. **Earned Leave** – System will carry forward all earned leave from previous year/anniversary period.
- e. **Unconsumed Carry Forward** – System will carry forward based on the *Unconsumed Carry Forward*. (This must set together with *Excess Policy* field)
- f. **Custom Carry Forward Policy** – User can define and customization the carry forward policy based on company requirements.

If this field is selected, additional **Carry Forward Expression** field will appear to allow user to customize the carry forward policy using expression.

Main	Policy	Advance Leave	Application	Approval	Attachment	Entitlement	Year End
+	Leave Grades	Carry Forward Policy	Expression	Carry Forward Expiry	Excess Policy		
	*	Full Year Entitlement		3 months			

Leave Grades	*
Carry Forward Policy	Custom Carry Forward Policy
Carry Forward Expression	

3. **Carry Forward Expiry** – To set the period when will the carry forward leave expire.

The screenshot shows a configuration window for leave grades. It includes the following fields:

- Leave Grades: \*
- Carry Forward Policy: Full Year Entitlement (dropdown menu)
- Carry Forward Percentage: 50.00 (text input)
- Carry Forward Expiry: 3 Months and 0 Days (spinners and unit labels, highlighted with a red box)

4. **Excess Policy** – used to set the rule on how to process the expired leave balance.
- Encashed** – The unconsumed carry forward will be encashed in payroll
  - Forfeited** – The unconsumed carry forward will be forfeit
  - Forfeited, negative balance is brought forward** – The unconsumed carry forward will be forfeit with negative balance brought forward.
5. **Employee Range** – to define which user entitle for this entitlement.

[Click here](#) to refer on how to set the employee range.

## Special Tab – NPL Penalty (Annual Leave for SG)

This tab will only appear when accessing country = Singapore and Leave Nature = Annual Leave. This tab is used to exclude unpaid leave period when computing the employee’s annual leave entitlement.

1. **NPL Leave Codes** – Select the leave that is apply to NPL penalty. User can select more than one leave code.
2. **NPL Minimum Value** – Define minimum number of days / hours for the NPL Penalty to kick in:
  - a. If value of *NPL Minimum* greater than value of *No Paid Leave Taken*, then system will not calculate the *NPL Penalty*.
  - b. If value of *NPL Minimum* smaller or equal value of *No Paid Leave Taken*, then system will calculate the *NPL Penalty*.
3. **NPL Denominator Type** – If this field is with value “- - **Please Select** - -” means is not defined. System will follow Calendar Days.
  - a. **Working Days** – System will compute the *NPL Penalty* based on leave request start date and end date with respect the employee’s calendar.  
Example: Employee apply *No Paid Leave* from Fri, 13 Jan 2023 to Mon, 16 Jan 2023, system will count the *Leave Taken* as 2 days
  - b. **Calendar Days** – System will compute *NPL Penalty* based on leave request start date and end date without respect the employee’s calendar.  
Example: Employee apply *No Paid Leave* from Fri, 13 Jan 2023 to Mon, 16 Jan 2023, system will count the *Leave Taken* as 4 days.
  - c. **Fixed** – If this value is selected, there will be an additional field **NPL Denominator Value** being enable in system for user to define the fix value for NPL Penalty computation.
4. **NPL Penalty Rounding** – Same function as *Rounding selection* in *Policy* tab but use for *NPL Penalty* amount.

## Special Tab – Compassionate Tab (Compassionate Leave)

This additional tab is used to define the different amount of entitlement for **Compassionate Leave** from different kinds of relationships.

### **Prerequisite:**

2 fields under **Application Tab** need to be defined prior setting up the max per time by relationship:

- **Require Relationship**
- **Deceased Date**

1. Click **+** button to define the maximum number of days to apply for *Compassionate Leave*.
2. Select the relationship from the drop-down list and setup the max per time.
3. Click **Save** button to save the update.



## Assign Leave Proration and Leave Rounding to Specific Leave Type

### Create Leave Proration

**Leave Proration** is to set the cut-off day for computation for both join date and exit date if using by month method.

**Access:** *Leave Module > Reference > Proration*

Code	<input type="text" value="LPRO"/>
Name	<input type="text" value="Leave Proration"/>
<b>Month Proration for Join Date</b>	
Cut Off Day 1 (1-31)	<input type="text" value="15"/>
Cut Off Day 2 (1-31)	<input type="text" value="30"/>
Value before and up to CO1	<input type="text" value="1"/>
Value after CO1 and up to CO2	<input type="text" value="0.5"/>
Value after CO2	<input type="text" value="0"/>
<input type="checkbox"/> Count Actual Days (By Calendar Days)	
<b>Month Proration for Exit Date</b>	
Cut Off Day 1 (1-31)	<input type="text" value="15"/>
Cut Off Day 2 (1-31)	<input type="text" value="30"/>
Value before CO1	<input type="text" value="0"/>
Value from CO1 and before CO2	<input type="text" value="0.5"/>
Value from CO2	<input type="text" value="1"/>
<input type="checkbox"/> Count Actual Days (By Calendar Days)	
<b>Leave Grade Change</b>	
Cut Off Day	<input type="text" value="0"/>
<input type="checkbox"/> Count Actual Days (By Calendar Days)	
<b>Service Year Change</b>	
Cut Off Day	<input type="text" value="0"/>
<input type="checkbox"/> Count Actual Days (By Calendar Days)	
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>	

1. Click  to add new leave rounding rules.
2. Click  pencil icon to edit or view the leave proration setting.
  - a. **Code** – (Mandatory) Define the code.
  - b. **Name** - (Mandatory) Define the name.
  - c. **Month Proration for Join Date:**
    - **Cut Off Day 1 (1-31)** - Set up the first period of one month (including the day).
    - **Cut Off Day 2 (1-31)** - Set up the second period of one month (including the day).
    - **Value before and up to CO1** - Set the value to calculate the period before cut-off day 1.
    - **Value after CO1 and up to CO2** - Set the value to calculate the period after Cut-Off Day 1 and up to Cut-Off Day 2.
    - **Value after CO2** - Set the value to calculate the period after cut-off day 2.
  - d. **Month Proration for Exit Date:**
    - **Cut Off Day 1 (1-31)** - Set up the first period of one month (including the day).
    - **Cut Off Day 2 (1-31)** - Set up the second period of one month (including the day).
    - **Value before and up to CO1** - Set the value to calculate the period before cut-off day 1.
    - **Value from CO1 and before CO2** - Set the value to calculate the period from

Cut-Off Day 1 and before Cut-Off Day 2.

- **Value from CO2** - Set the value to calculate the period from cut-off day 2.
3. Once successfully created the leave proration, user may assign it to specific leave type under [Reference > Leave > Policy Tab](#).

**Proration Setup Example:**

**Proration for Join:**

- If employee join on 2022-01-14, whole month leave is given.
- If employee join on 2022-01-15, whole month leave is given.
- If employee join on 2022-01-16, half month leave is given.
- If employee join on 2022-01-17, half of month leave is given.
- If employee join on 2022-01-18, no leave for the month is given.

**Proration for Date Exit:**

- If employee exit on 2022-01-14, no leave for the month is given.

- If employee exit on 2022-01-15, half month leave is given.
- If employee exit on 2022-01-16, half month leave is given.
- If employee exit on 2022-01-17, whole month leave is given.
- If employee exit on 2022-01-18, whole month leave is given.

## Create Leave Rounding


**Leave Rounding** is to set the rounding method for decimal points of leave entitlement. Some leave entitlement will not be rounded number after proration. So, this function is to make entitlement be integer. This setup may be vary depending on client's requirement or specification.

**Access: Leave Module > Reference > Rounding**

1. Click **+** to add new leave rounding rules.
2. Click **✎** pencil icon to edit or view the existed leave rounding.
3. If user is creating new rounding rules, insert the value for **Name** and **Code**. Once completed, click **Update** button.

4. Once updated, a section to update the rounding figure will be enabled. Click **+** to

insert the value.

5. Click  to save the value.

6. Click **Update** once value for rounding is updated.

7. Once successfully created the leave rounding, user may assign it to specific leave type under [Reference > Leave > Policy Tab](#).

### Rounding Setup Example 1

If need to set rounding policy as follow:

- Amount's decimal (less than 0.5) round to 0

- Amount's decimal (equal to 0.5) round to 0.5
- Amount's decimal (more than 0.5) round to 1

Following are the steps:

1. Set the code of Rounding rule.
2. Set the name of Rounding rule.
3. Click **Rounding Type** as **Round Fraction Only**, then this rounding rule will only work to decimal not whole number.
4. Set the following:
  - a. Value from is 0.01, Round To is 0.00
  - b. Value from is 0.50, Round To is 0.50
  - c. Value from is 0.51, Round To is 1.00

	Value From	Round To
	0.01	0.00
	0.50	0.50
	0.51	1.00

### Rounding Setup Example 2

If need to set rounding policy as follow:

- Amount's decimal (less than 0.5) round to 0
- Amount's decimal (more than 0.5) round to 0.5

Following are the steps:

1. Set the code of Rounding rule.
2. Set the name of Rounding rule.
3. Click **Rounding Type** as **Round Fraction Only**, then this rounding rule will only work to decimal not whole number.
4. Set the following:
  - a. Value from is 0.01, Round To is 0.00
  - b. Value from is 0.5, Round To is 0.50

Code: CN\_Default

Name: CN\_Default

Rounding Type:  Round Fraction Only  Round Whole Number

+	Value From	Round To
	0.01	0.00
	0.50	0.50

## Create Parent Child Leave

**Parent Child** leave is used to setup multiple leave codes to deduct the overall leave to the total of parent leave. Prerequisite for setting parent child is *Leave Type* need to be created prior to creation of *Parent Child Leave*.

**Access:** *Leave Module > Reference > Parent Child*

1. Click **+** icon to add field selection or icon to edit existing field.
2. Define the fields as below:
  - a. **Leave Parent**
  - b. **Leave Child**
  - c. **Leave Grand Child**
3. Click **Update** button to save it.

Example:

In some country/region, there is a *Leave Type* called *Emergency Leave*, typically a leave that was applied less than the stipulated days in advance, and it will deduct the *Annual Leave*. Hence, the setup are as follows:

## Holiday Setup

Admin can use the **Holiday function** to set up holidays of each country and region. If there is no need for employees to work on holiday, the system will automatically take the holiday as **OFF shift** (setup in calendar), and **work status will be "O"**.

There are three ways to access the **Holiday function**:


1. **Personnel Module > Reference > Statutory > Holiday**
2. **Leave Module > Reference > Holiday**
3. **Attendance Module > Reference > Attendance > Holiday**

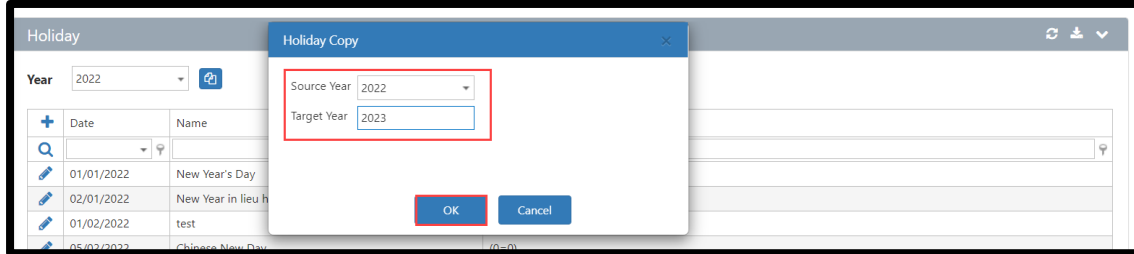
## View Holiday by Year

Click on **Year** drop down list will show the years of all holiday entries. Select the year to view all existing holiday entries by respective year.


Year	Name	Employee Range
2022		
2021		
2020	New Year's Day	(0=0)
2019	New Year in lieu holiday	((TblEmployee.CountryCode='TH'))
2018		((TblEmployee.CountryCode='MY'))
2017		
19/02/2022	Makha Bucha Day	((TblEmployee.CountryCode='TH'))

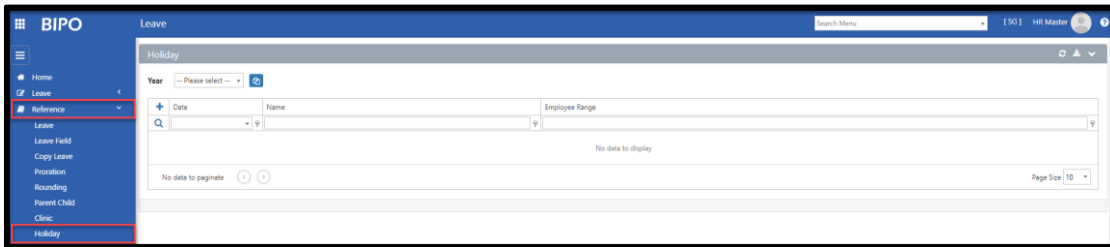
## Copy Holiday from One Year to Another

Click on , the copy button to copy holidays from one year to another. With this, admin will not need to recreate all holidays from scratch which is more time effectiveness.



## Create Holiday (by Manual Entry)

1. Click on  icon to create a holiday.



2. You will see the following fields:

- a. **Date** – Enter the date of holiday. If there are two different holidays on the same day in different countries, the user is required to define in **Countries/Regions** field.
- b. **Name** – Enter the name of holiday.

- c. **Statutory** – To specify if the holiday should follow a country’s (either Hong Kong, China, Macau or Taiwan) statutory laws. For instance, if China is ticked, employees with this entitlement and who work on this date will get paid 3 times the salary if they work on this Holiday, per China’s statutory (employment) laws.
- d. **Philippines Statutory** – This field is to specify if the holiday is in Philippines. Select if:
  - **Legal Holiday** – This Holiday is a legal holiday if it is a regular holiday with a fixed date.
  - **Special Non-Working Holiday** – This Holiday is a special non-working holiday if it is not a regular holiday with a fixed date; it is either enacted by Congress or declared by the President.
  - **Double Holiday** – This Holiday is a double holiday if it falls on the same date as another Philippines holiday.
- e. **Deduct Full on Eve** – To specify if system should or should not deduct one day or half day leave, if employees take leave on eve of the Holiday (i.e., the day before).

If Deduct Full on Eve set to Yes, 2 additional fields will be revealed.

- **Deduct Full on Eve (Race)** – it can decide what kind of race can use this function. You can configure race options via **Personnel > Reference > Personal > Ethnic Origin**.
- **Deduct Full On Eve (Religion)** – it can decide what kind of religion can use this function. You can configure religion options via **Personnel > Reference > Personal > Religion**.

Scenario Case for Deduct Full on Eve:

Scenario 1: Setup Holiday for\_Halloween without specific Race and Religion

Holiday Setup:	
Field	Value
Date	31 <sup>st</sup> October
Deduct Full on Eve	Yes
Deduct Full on Eve (Race)	Undefined (System default to be * when Deduct Full on Eve = Yes)

<b>Deduct Full on Eve (Religion)</b>	Undefined (System default to be * when Deduct Full on Eve = Yes)
<b>Expected Result:</b>	
Employee of any race or religion allow to apply for half day leave on Eve (30 Oct) and system will deduct as full day.	

Scenario 2: Setup Holiday for Halloween with specific Race and Religion

<b>Holiday Setup:</b>	
<b>Field</b>	<b>Value</b>
<b>Date</b>	31 <sup>st</sup> October
<b>Deduct Full on Eve</b>	Yes
<b>Deduct Full on Eve (Race)</b>	Han
<b>Deduct Full on Eve (Religion)</b>	Islam
<b>Expected Result:</b>	
When an employee of race = Han and religion = Christianity, applies for half day leave on Eve (30 Oct), system should <u>deduct as half day</u> .	
When an employee of race = Zhuang and religion = Islam, applies for half day leave on Eve (30 Oct), system should <u>deduct as half day</u> .	
When an employee of race = Han and religion = Islam, applies for half day leave on Eve (30 Oct), system should <u>deduct as full day</u> .	

Scenario 3: Setup Holiday with no leave deduction on holiday eve

If Deduct Full on Eve is set to No or Undefined, the leave deduction will follow the leave duration submitted.

**Deduct Full on Eve** – If set to No or Undefined, when employee applies for half day leave on Eve (30 Oct), system still regards as half day with half day leave deduction.

- f. **Countries/Regions** – The default value is \* means all countries and can be defined as specific country only for two different holidays on the same day in different countries.

**Create Holiday (by Data Upload)**

Holiday can be uploaded to eliminate the process of manual entry of each holiday. The

format could be:

- CSV file
- XLS file

**Access: System > Interface > Data Upload**

**Data Upload**

Step 1: BIPO-HL-XLS - BIPO - Holiday Master (xls file) [BIPO-HL-CSV - BIPO - Holiday Master (csv file) | BIPO-HL-XLS - BIPO - Holiday Master (xls file)]

Step 2

Uploaded Files: [ ]

File: [Select a file...] [Browse]

[Upload]

Table: TblHoliday  
 Keys: HolidayDate  
 Field: HolidayDate, HolidayName, HKStatutory, CNStatutory, DeductFullOnEve, CountryCodes, Condition, MOStatutory, TWStatutory, PHStatutory

Note: Date field must be in yyyy-mm-dd format for importing.

[Download Template] [Process]

1. Prepare an excel and use the **Field** as header. You can click **Download Template** to get a copy of the template too.

**Note: Download Template button is only available for xls file format.**

Table: TblHoliday  
 Keys: HolidayDate  
 Field: HolidayDate, HolidayName, HKStatutory, CNStatutory, DeductFullOnEve, CountryCodes, Condition, MOStatutory, TWStatutory, PHStatutory

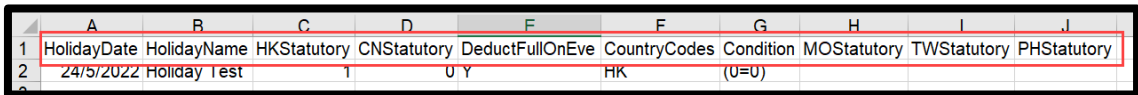
Note: Date field must be in yyyy-mm-dd format for importing.

**Note:** The **Field** (header) input requires the correct format and values.

Field (header)	Format type	Value	Remarks
HolidayDate	date		Must be in <b>YYYY-MM-DD</b> format.
HolidayName	character		
HKStatutory	character	'1' / '0'	Input '1' if this is a requirement. Otherwise, leave blank.
CNStatutory	character	'1' / '0'	Input '1' if this is a requirement. Otherwise, leave blank.
DeductFullOnEve	character	'Y' / 'N'	Input 'Y' if there is full day deduction. Otherwise, leave

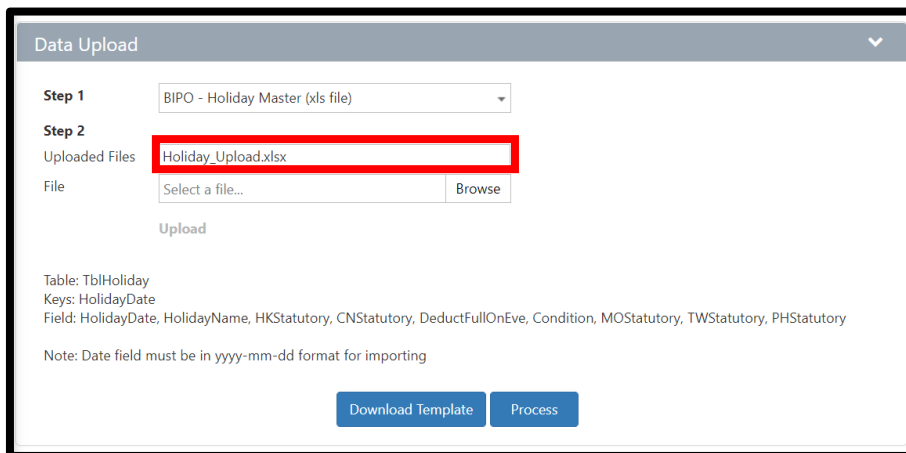
			blank.
CountryCodes	character		Input the country code accordingly. E.g., CN, ID, HK.
Condition	character	(0=0)	Input as '(0=0)' for employee range equals to all records.
MOSTatutory	character	'1' / '0'	Input '1' if this is a requirement. Otherwise, leave blank.
TWStatutory	character		
PHStatutory	character	'L' / 'S' / 'D'	Input 'L' for Legal Holiday, 'S' for Special Non-Working Holiday and 'D' for Double Holiday.  If value needs to be changed, you will have to change the Country/Region to Philippines.

2. Save the populated excel file to upload containing.



	A	B	C	D	E	F	G	H	I	J
1	HolidayDate	HolidayName	HKStatutory	CNStatutory	DeductFullOnEve	CountryCodes	Condition	MOSTatutory	TWStatutory	PHStatutory
2	24/5/2022	Holiday Test	1		U	Y	HK	(U=0)		

**Browse** the upload template. Click **Upload**. It will now be transferred to **Uploaded Files** field.



**Data Upload**

**Step 1** BIPO - Holiday Master (xls file)

**Step 2**

Uploaded Files: Holiday\_Upload.xlsx

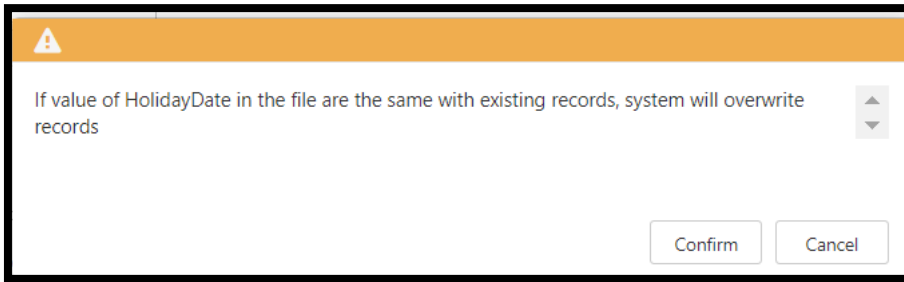
File:

Table: TblHoliday  
 Keys: HolidayDate  
 Field: HolidayDate, HolidayName, HKStatutory, CNStatutory, DeductFullOnEve, Condition, MOSTatutory, TWStatutory, PHStatutory

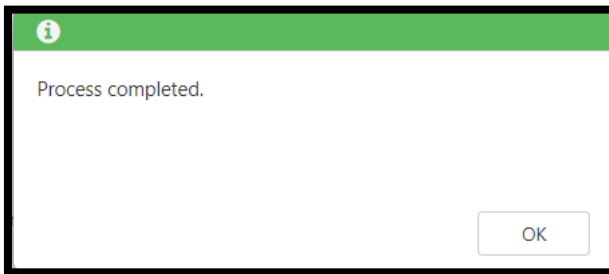
Note: Date field must be in yyyy-mm-dd format for importing

3. Click **Process**.
4. A notification will be displayed that if there is an existing holiday in the same date,

it will overwrite. Click **Confirm**.

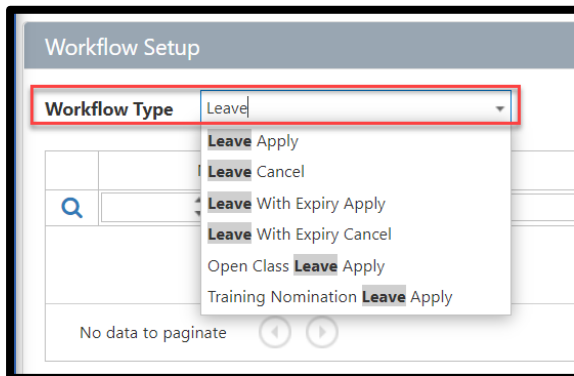


5. The process will be completed upon successful upload.




## Leave Workflow Setup

**Workflow Setup** is used to configure the *Workflow Type* relating to its approvers and workflow process.



## Overall Setup

1. Go to Workflow Setup master screen:  
**Access: Setup > Workflow > Workflow Setup**

2. Select the **Workflow Type**, example, *Leave Apply*.
3. Click the add “+” icon to enter a new *Leave Workflow Setup* or edit “” icon to modify an existing.
4. Specify the **No.** sequence. The system will check conditions/policies set in each number sequence starting with the smallest number sequence before checking subsequent workflow number.  
  
Example: If a leave application matches conditions set in workflow No. 1, system will take approver line from workflow No. 1 and ignore workflow No. 2, 3, 4, etc).
5. Enter the **Name** of the Workflow.
6. Define the **Amount From**. This will trigger the workflow based on the amount specified.
  - a. *By Application* - This workflow will trigger based on total days in an application regardless of month and year.
  - b. *By Month* – This workflow will trigger based on total days accumulated in the same month.
  - c. *By Year* - This workflow will trigger based on total days accumulated in the same year.

Example:

- If *Amount From* is set to 5, with *By Application* - the employee applied 5 days leave or more per application, then the system will follow this workflow.
- If *Amount From* is set to 5, with *By Month* - the employee has applied 4 days leave in January prior to this application, then upon submitting another 1

day of leave in January, the system will be triggered to follow this workflow (unless if the employee only submits a half day leave, in which case the total is 4.5 days and still below the set amount). In other words, the workflow will only be used when an accumulation of 5 days or more is applied within same month.

- If *Amount From* set is to 5, with *By Year* - the employee has applied 4 days leave in year 2020 prior to this application, then upon submitting another 1 day of leave in 2020 the system will be triggered to follow this workflow (unless if the employee only submits a half day leave, in which case the total is 4.5 days and still below the set amount). For this setting, the workflow will only be used when an accumulation of 5 days or more is applied within the same year.

**7. Rejection Workflow**

- Sequence No.* – This will enable another box to select other workflow that the system will follow if the leave is rejected

Example:

In the following workflow setting (refer screenshot below), *Sequence No.* is selected for *Rejection Workflow* and *Second Workflow* is chosen.

Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
1	Employee_A - Employee A			Approval Workflow				
2	Employee_B - Employee B			Approval Workflow				

The following are the approval line for both workflows.

First Workflow:

Level 1 – Employee A

Second Workflow:

Level 1 – Employee D

Level 2 – Employee B

Level 2 – Employee E

Using the above settings, if an employee submits leave application and gets rejected by either Employee A or Employee B (from the *First Workflow*), system will refer to *Second Workflow* for approval (refer to below screenshot).

The screenshot displays the 'Leave Record' and 'Leave Detail' sections. The 'Leave Record' shows an Annual Leave application for 2021, starting on 21/06/2021 and ending on 21/06/2021, for 1.00 days. The 'Leave Detail' shows the application status as Rejected by Employee B. The Approval table shows a sequence of actions: Submitted by hr05 - HR 05, Approved by Employee A, Rejected by Employee B, and Pending Approval by Employee D and Employee E. Red boxes highlight the Rejected row and the Pending Approval rows. Red text labels 'First Workflow' and 'Second Workflow' are overlaid on the screenshot.

- b. *Previous Approver* – The leave application will be returned to the previous approver when the current approver rejects it.

The screenshot shows the 'Apply Leave - Sample' form. The 'Rejection Workflow' dropdown menu is highlighted with a red box and set to 'Previous Approver'. Other fields include 'No.' (1), 'Name' (Apply Leave - Sample), 'Amount From' (0.00), and 'Workflow Method' (Normal).

Example:

Level 1, 2 and 3 approvers are Employee A, B and C respectively. Using *Previous Approver* setting, if Employee A approves the application but Employee B rejects, the system will refer to Employee A again for approval. If Employee A approves it again, the application will then continue to Employee C for approval.

- c. *Reject Continue* – The application will continue to the next level approver even if it is rejected (final decision rests with the final approver).

A screenshot of a web form for 'Apply Leave - Sample'. The form includes fields for 'No.' (1), 'Name' (Apply Leave - Sample), 'Amount From' (0.00), and 'By Application' (dropdown). The 'Rejection Workflow' dropdown is highlighted with a red box and shows 'Reject Continue' selected. The 'Workflow Method' dropdown is set to 'Normal'.

- d. -- Please Select -- / Undefined – If first approver/current approver rejects the application, the whole application record will be rejected and will not continue to the next level.

A screenshot of a web form for 'Apply Leave - Sample'. The form includes fields for 'No.' (1), 'Name' (Apply Leave - Sample), 'Amount From' (0.00), and 'By Application' (dropdown). The 'Rejection Workflow' dropdown is highlighted with a red box and shows '-- Please select --' selected. The 'Workflow Method' dropdown is set to 'Normal'.

## 8. Workflow Method

- a. *Normal* – System will follow workflow as per normal.
- b. *Line Manager* – System will have additional fields to fill in to specify approver for different level and conditions (refer screenshot below).

A screenshot of the 'Line Manager' configuration form. The 'Workflow Method' dropdown is highlighted with a red box and set to 'Line Manager'. The form includes several tables for configuration:
 

- CC List:** A table with columns for No., Condition, and CC List, currently empty.
- Starting Condition:** A text input field with '(0=0)' and a dropdown arrow.
- Ending Condition:** A text input field with '(0=0)' and a dropdown arrow.
- Employee Range:** A text input field with '(0=0)' and a dropdown arrow.
- Description:** A large text area for notes.

 At the bottom, there are buttons for 'Save and Copy', 'Update', 'Delete', and 'Close'.

In *Line Manager*, approver levels will continue to loop based on reporting line (Line Manager).

- *Starting Condition* – The condition to start the approver loop.
- *Ending Condition* – The condition to end the approver loop.

Example:

Employee A has Employee B as Line Manager.

Employee B has Employee C as Line Manager.

Employee C has Employee D as Line Manager.

Scenario 1:

*Starting Condition* : (0=0)

*Ending Condition* : (EmployeeCode = Employee\_D)

When Employee A submits an application, the following will be the approval line:

Employee B → Employee C → Employee D

The screenshot shows a configuration window for a 'Line Manager' workflow. At the top, 'Workflow Method' is set to 'Line Manager'. Below this is a table with columns: Level, Approver, Level Type, Level Number, Type, CC List, CC Email, Skipped Approval, and Person In Charge. The table is currently empty, displaying 'No data to display' and 'No data to paginate'. Below the table, there are two condition fields: 'Starting Condition' with the value '(0=0)' and 'Ending Condition' with the value '((TblEmployee.EmployeeCode='Employee\_D'))'. Both condition fields are highlighted with a red border. At the bottom, there is another identical empty table structure.

Scenario 2:

*Starting Condition* : (0=0)

*Ending Condition* : (EmployeeCode = Employee\_C)

When Employee A submits an application, the following will be the approval line:

Employee B → Employee C

Workflow Method: Line Manager

+ Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display								
No data to paginate								
Page Size: 200								

Starting Condition: (0=0)

Ending Condition: ((TblEmployee.EmployeeCode='Employee\_C'))

+ Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display								
No data to paginate								
Page Size: 200								

Scenario 3:

*Starting Condition : (EmployeeCode = Employee\_C)*

*Ending Condition : (EmployeeCode = Employee\_D)*

When Employee A submits an application, the following will be the approval line:

Employee C → Employee D

Workflow Method: Line Manager

+ Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display								
No data to paginate								
Page Size: 200								

Starting Condition: ((TblEmployee.EmployeeCode='Employee\_C'))

Ending Condition: ((TblEmployee.EmployeeCode='Employee\_D'))

+ Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display								
No data to paginate								
Page Size: 200								

Scenario 4:

*Starting Condition* : (0=0)

*Ending Condition*: (0=0)

When Employee A submits an application, system will take direct Line Manager as the only approver, in this case:

Employee B

Workflow Method: Line Manager

+	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display									
No data to paginate									

Starting Condition: (0=0)

Ending Condition: (0=0)

+	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display									
No data to paginate									

Notice there are 2 other *Approver setup* before and after *condition loop*:

+	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display <b>1</b>									
No data to paginate									

Starting Condition: (0=0)

Ending Condition: ((TblEmployee.EmployeeCode='Employee\_D'))

+	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
No data to display <b>2</b>									
No data to paginate									

- *Approval Level 1 (before condition loop)* – To add other approvers before

starting loop.

- *Approval Level 2 (after condition loop)* – To add other approvers after ending loop.

Example (using previous Scenario 1):

	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
	1	Employee_E - Employee E							

Page 1 of 1 (1 items) Page Size 200

Starting Condition (0=0)

Ending Condition ((TblEmployee.EmployeeCode='Employee\_D'))

	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
	1	Employee_F - Employee F							

Page 1 of 1 (1 items) Page Size 200

If Employee E is added before the loop starts, Employee E will be the first approver.

If Employee F is added after the loop end, Employee F will be the last approver.

Using this example, when Employee A submits an application, the following will be the approval line:

Employee E → Employee B → Employee C → Employee D → Employee F

**Note:** For more details on *Approver Level* setup, please refer to [Approval Level Chapter](#).

- *CC Condition* – To specify the condition for email CC and who to send the emails to.

When *Workflow Method* is selected as *Line Manager*, a section called *CC Condition* will appear next to the *condition loop* setting section:

Using the below screenshot as an example:

CC Condition			
	No.	Condition	CC List
	1	((TblEmployee.EmployeeCode='Employee_C'))	#HOD
	2	((TblEmployee.EmployeeCode='Employee_D'))	CEO

Page 1 of 1 (2 items) Page Size 200

When Employee C approves / rejects an application, system will send email to Head of Department.

When Employee D approves / rejects an application, system will send email to CEO.

9. **CC List** – Click the to select a role or employee that will be CC once workflow triggers (refer screenshot below).
10. **CC Email** – Enter an email address manually for email to be CC once workflow triggers (refer screenshot below).

11. **Leave Codes** – Select the Leave Types that this workflow is applicable. Multiple Leave Types can be selected (refer screenshot above).

12. **Same for Workflow Cancel** – Once checked, the same workflow will apply if

employee cancels an approved leave (refer screenshot above).

**Note:** This setting applies to delegated approver as well.

- Skip Workflow** – If ticked, then the leave application will be auto approved for selected employee range. This can be used when certain group of employees require no approval, for example, CEO and Directors.

By default, if no workflow is set, employees will not be able to submit an any application at all, hence, workflow is still required, and *skip workflow* will be enabled for exemption from approval (refer screenshot above).

- Skip Workflow Email** – If ticked, then the Workflow Email setup in **Setup > Workflow > Workflow Email** will be skipped (refer screenshot above).

- Employee Range** – Specify if this workflow is only applicable to certain employees. Employee will not be able to apply leave if he/she is not included in this range. Must be set to value (0=0) if it applies to all.

- Description** – This is an optional free-text for any description/comments about the Workflow.

## Approval Levels

**Approval Level** setting is used to determine the approvers and the certain approval/rejection process that the system will follow for each individual level.

	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Person In Charge
	1	#SELF - Self			Operation Workflow			
	2	#POINTED - Pointed By Previous Approv	Employee		Operation Workflow	...		((TblEmployee.EFR02='Y')) ...
	3	#POINTED - Pointed By Previous Approver	Employee		Operation Workflow			((TblEmployee.EFR04='Y'))
	4	#POINTED - Pointed By Previous Approver	Employee		Operation Workflow			((TblEmployee.EFR03='Y'))
	5	93100858 - TEO KOK FONG (DELWIN)			Normal Workflow			
	6	#ROLE_HR - HR			Approval Workflow			

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Update Delete Close

- Level** – It is the sequence of workflow approver:







Example:

- Level 1 = Approver A
- Level 2 = Approver B

Which means this workflow will first go to Approver A then go to Approver B.

- Approver** – Used to specify who the approver is for the respective level.

**Note:** Approver selection can be either based on #ROLE (example, #SELF or #MGR\_LM) or specific employees (refer screenshot below):

	Level	Approver	Level Type	Level Number
 	1	#MGR_LM - Line Manager	Employee	1
 	2	#MGR_DM - Department Manager	Previous Approver	1
 	3	1008 - Audrey		

3. **Level Type** – Used to specify if Approver is Employee or Previous Approver.

**Note:** Level Type need to be set together with Level Number (refer to example below).

4. **Level Number** – It is connected to the column Approver and Level Type.

Example:







Employee A’s Line Manager is Employee B



Employee B’s Line Manager is Employee C

Employee C’s Line Manager is Employee D

Employee D’s Line Manager is Employee E

Scenario 1:

	Level	Approver	Level Type	Level Number
 	1	#MGR_LM - Line Manager	Employee	1
 	2	#MGR_LM - Line Manager	Employee	2
 	3	#MGR_LM - Line Manager	Employee	3

Page 1 of 1 (3 items)  **1** 







With the above setting (take note on the Level Type and Level Number), when Employee A applies leave, the approver will be as follow:

Level 1 > Employee B

Level 2 > Employee C

Level 3 > Employee D

Scenario 2:

	+	Level	Approver	Level Type	Level Number
	 	1	Employee_C - Employee C		
	 	2	#MGR_LM - Line Manager	Previous Approver	1
	 	3	#MGR_LM - Line Manager	Previous Approver	1

With the above setting, when Employee A applies leave, the approver will be as follow:

Level 1 > Employee C









Level 2 > Employee D

- *Level Type = Previous Approver, Level Number = 1*, means Level 1 approver's (Employee\_C) 1<sup>st</sup> level Line Manager

Level 3 > Employee E

- *Level Type = Previous Approver, Level Number = 1*, means Level 2 approver's (Employee\_D) 1<sup>st</sup> level Line Manager

**Note:** *Level Type* and *Level Number* selection will only be available when *Approver* is *Manager (#MGR)*.

	+	Level	Approver	Level Type	Level Number
	 	1	#MGR_LM - Line Manager	Employee	1
	 	2	#MGR_DM - Department Manager	Previous Approver	1
	 	3	1008 - Audrey		
	 	4	#MGR_DM - Department Mana		

Level Number & Level Type available for selection when Approver is selected from #MGR

5. **Type:** Selection of either *Approval Workflow / Operation Workflow / Normal Workflow*. When this field is blank, it will follow *Approval Workflow* as default.

*Normal workflow:*

- System will skip repeated approval level (example, Level 1 = Employee A, Level 2 = Employee B, Level 3 = Employee A. Employee A only approve at Level 1 and will skip Level 3).
- System will check and skip approver level if applicant is also the approver for that level.

*Approval workflow:*

- System will skip repeated approval level (example, Level 1 = Employee A, Level 2 = Employee B, Level 3 = Employee A. Employee A only approve at Level 1 and will skip Level 3).
- System will check and skip approver level if applicant is also the approver for that level.
- System will check whether if the applicant is a line manager to one of the approver and if it is, then system will skip the approver's level.

*Operation workflow:*

- System will approve/reject per set levels.

Example:

Scenario 1:

Workflow set as following:

Level 1 – **Employee A**

Level 2 – Employee B

Level 3 – **Employee A**

When Employee C applies for leave, and the following Type is selected:

**Normal Workflow:** Employee A only need to approve once, the third level will be skipped.

**Approval Workflow:** Employee A only need to approve once, the third level will be skipped (same as the *Normal Workflow*).

**Operation Workflow:** Employee A need to approve twice, the third level will not be skipped.

Scenario 2:

Workflow set as following:

Level 1 – Employee A

Level 2 – Employee B

Employee B's line manager is Employee C (as defined in *Employee's Profile > Assignment tab*)

When Employee C applies for leave, and the following Type is selected:

**Normal Workflow:** Employee B still need to approve.

**Approval Workflow:** Employee B approval will be skipped.

**Operation Workflow:** Employee B still need to approve as per level setting.

Scenario 3:

Workflow set as following:

Level 1 – Employee A

Level 2 – Employee B

When Employee B applies for leave, and the following Type is selected:

**Normal Workflow:** Employee B approval will be skipped.

**Approval Workflow:** Employee B approval will be skipped.

**Operation Workflow:** Employee B still need to approve as per level setting.

Scenario 4:

Workflow set as following:

Level 1 – Employee A

Level 2 – Employee B

Level 3– Employee C

When Employee B is Employee A’s subordinate, Employee A applies for leave, and the following Type is selected:

**Normal Workflow:** Employee A approval will be skipped.






**Approval Workflow:** Employee A approval will be skipped; Employee B will also be skipped.

**Operation Workflow:** Employee A still need to approve as per level setting.

Scenario 5:

Workflow set as following:

Leave approval workflow set with 2 level line manager approval, as shown:

	Level	Approver	Level Type	Level Number	Type
 	1	#MGR_LM - Line Manager	Employee	1	Approval Workflow
 	2	#MGR_DM - Department Manager	Employee	2	Approval Workflow

Employee A’s line manager is Employee B (as defined in *Employee’s Profile > Assignment tab* and with only one level reporting).

Employee B’s line manager is undefined.

When Employee A applies for leave, the approver will be as follow (for all Types):

**All Type:** Level 1 > Employee B

**Note:** System will not proceed to 2<sup>nd</sup> level when the approver for 2<sup>nd</sup> level is not defined for the employee.

6. **CC List** – Click the “...” to select a role or employee that will be CC’d once the approver approves.
7. **CC Email** – Enter an email address manually to be CC once the approver approves (usually email address of external entity or other employees not listed in employee master).
8. **Skipped Approval** – Skip approver if the selected employee is the approver.

	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
	1	#MGR_LM - Line Manager	Employee	1	Operation Workflow				
	2	#MGR_LM - Line Manager	Employee	2	Operation Workflow			Employee_C - Employee C	
	3	#MGR_LM - Line Manager	Employee	3	Operation Workflow				

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Example:

From above picture, under *Type = Operation Workflow*, if applicant’s 2nd level manager is Employee C, then Level 2 approval will be skipped.

9. **Person in Charge** – only used when *Approver* is set as *#POINTED - Pointed by Previous Approver*, to decide the employee range can be selected in Previous Approver.

	Level	Approver	Level Type	Level Number	Type	CC List	CC Email	Skipped Approval	Person In Charge
	1	#MGR_LM - Line Manager	Employee	1	Approval Workflow				
	3	1008 - Audrey			Approval Workflow				
	4	#POINTED - Pointed By	Employee		Approval Workfl	...			((TblEmployee.EmployeeCo ...

Page 1 of 1 (3 items) Page Size 200

*Person In Charge* selection range will be activated when *Approver* is selected as *#POINTED - Pointed By Previous Approver*.

## Workflow Report

**Workflow Report** is used to view the list of *Approval Workflow* for all types of workflows for all employees.

**Access:** Setup > Workflow > Workflow Report

### 1. Report:

- **Workflow Listing** – To view the list of Approval Workflow for all employees.

A	C	L	M	N	O	P	Q	R	S
WorkflowTypeName	WorkflowName	EmployeeCode	EmployeeName	Approver1	ApproverName1	Approver2	ApproverName2	Approver3	ApproverName3
Leave Apply	Demo	Employee_A	Employee A	Employee_B	Employee B	Employee_C	Employee C	Employee_D	Employee D
Leave Apply	Demo	Employee_B	Employee B	Employee_C	Employee C	Employee_D	Employee D		
Leave Apply	Demo	Employee_C	Employee C	Employee_D	Employee D				
Leave Apply	Demo	Employee_D	Employee D						

All approver names and IDs will be displayed in the report.

- **Employee Without Approval Setup** – To view the list of Employees which Approval Workflow has not been setup yet.
2. **Workflow Type** – To filter out the report based on selected *Workflow Type*.
  3. **Include CC List** – If ticked, report will show CC list of each approver level (referring to CC List in Workflow Setup), as pictured below.

A	N	O	P	Q	R	S	T	U	V	W
WorkflowTypeName	EmployeeCode	EmployeeName	Approver1	ApproverName1	ApproverCCList1	ApproverCCListName1	Approver2	ApproverName2	ApproverCCList2	ApproverCCListName2
Leave Apply	Employee_A	Employee A	Employee_B	Employee B	HOD	Head of Department	Employee_C	Employee C	HOD	Head of Department
Leave Apply	Employee_B	Employee B	Employee_C	Employee C	HOD	Head of Department	Employee_D	Employee D	HOD	Head of Department
Leave Apply	Employee_C	Employee C	Employee_D	Employee D	HOD	Head of Department	Employee_E	Employee E	HOD	Head of Department
Leave Apply	Employee_D	Employee D	Employee_E	Employee E	HOD	Head of Department				

4. **Query** – For further filtering by selecting certain data range and sorting order.

## Create Leave

This page is used to create leave in bulk.

**Access: Leave Module > Leave > Utility > Create Leave**

1. **Step 1** select **Start a New Global Update**.

The screenshot shows the 'Create Leave' form with 'Step 1' selected. A dropdown menu is open, showing two options: 'Start a new Global Update' (highlighted with a red box) and 'Undo previous Global Update'.

2. **Step 2** select the **Leave Code** for leave creation.

The screenshot shows the 'Create Leave' form with 'Step 1' set to 'Start a new Global Update' and 'Step 2' set to '-- Please select --'. The 'Step 2' section is highlighted with a red box.

3. Define the value for fields as below:

- a. **Leave Start**
- b. **Leave End**
- c. **Remarks**
- d. **Employee Range**

4. Click **Next** button.

The screenshot shows the 'Create Leave' form with all fields filled out. 'Step 1' is 'Start a new Global Update', 'Step 2' is 'SGNSL - National Service Leave', 'Leave Start' is '09/03/2023' with '1st Half', 'Leave End' is '09/03/2023' with '2nd Half', 'Remarks' is empty, and 'Employee Range' is '(0=0)'. A blue 'Next' button is at the bottom right.

5. Scroll down and verify the employee that wish to create leave. Afterward, click **Process** button.

Valid: 1 Invalid: 0									
Invalid	Employee Code	Employee Name	Leave Start	Half Start	Leave End	Half End	Taken	Balance	Invalid Reason
	SG0005	Test5	09/03/2023	1st Half	09/03/2023	2nd Half	1.00	0.00	

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[Download Invalid](#) [Process](#)

## Block Leave

This page is design for user to prevent employee from applying certain type of leave in a specific period.

**Access: Leave Module > Leave > Utility > Block Leave**

Block Leave

+ Date Start	Half Start	Date End	Half End	Leave Codes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Start	1st Half	Date End	2nd Half	Leave Codes *
Remarks				
Condition (0=1)				

[Update](#) [Close](#)

1. Click **+** button.
2. Define the value for fields as below:
  - a. Date Start
  - b. Date End
  - c. Leave Codes
  - d. Remarks
3. Set up **Condition** field. Input as '(0=0)' for employee range equals to all records.
4. Click **Update** button.

## Copy Leave

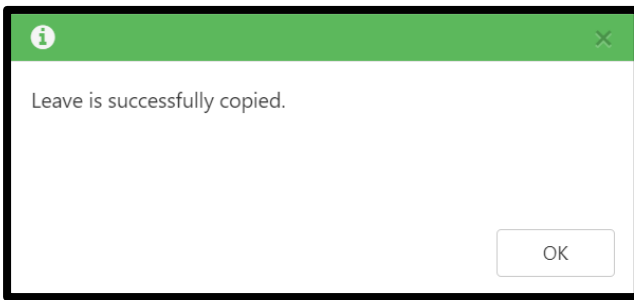
This page is design to ease the repetitive steps needed when creating different leave code with similar leave setting.

**Access: Leave Module > Reference > Copy Leave**

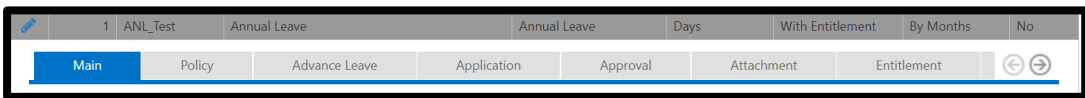
1. Define the value for field as below:
  - a. **Leave** – Select the source of claim code that require to copy from the drop-down selection.
  - b. **New Leave Code** – Enter the New Claim Code. It should be unique and cannot contain blank spaces.
2. Click **Process** button once value had been defined for both fields.

3. Click **OK** button to proceed.

4. System will prompt message on the successfully copied Leave Code, click **OK** button.



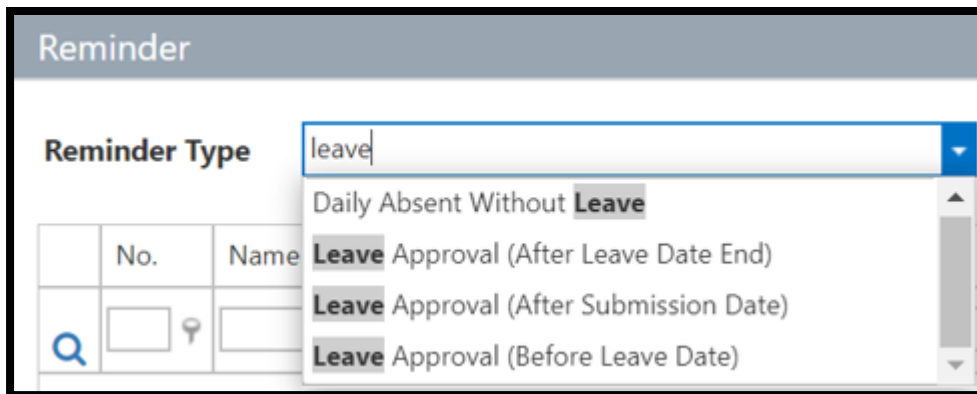
5. A new Leave Code will be created with all the claim type setup (from all the tabs) will be copied over from the source Leave Code.



## Leave Reminder

**Reminder** is used to notify an employee to act regarding the selection of options available from the drop-down menu. User can also set the timeframe of the reminder.

**Access:** Setup > Reminder



1. Click the add **+** icon to enter a new **Reminder** or edit  icon to modify an existing.

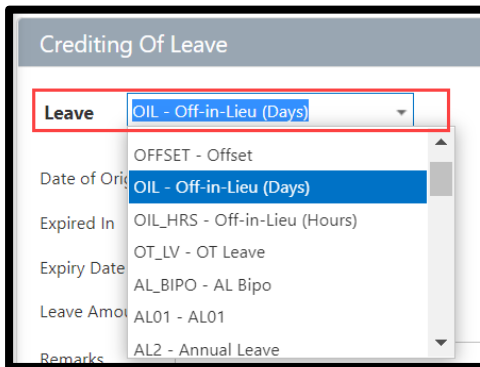
2. Define the value for field as below:
  - a. **No** – This is the sequence order of reminder.
  - b. **Name of the Reminder** - Name is default with Reminder Type but can be edited.
  - c. **Reminder Days** - Set the number of days in relation to the Reminder Type.
  - d. **Reminder To** – Click ⋮ to set who will receive the reminder from the list.
  - e. **Repeat Days** – Reminder will be triggered again after the number of days specified.
  - f. **Cut Off Date** – Reminder will only be used for the leave applications start from this date.
  - g. **Do not send to CC list** – When ticked, system will not send reminder to CC list in leave application.
  - h. **Leave Codes** – Click ⋮ to specify the leave type applicable to this reminder.
  - i. **Employee Range** – Click ⋮ to specify the applicable employee. [Click here](#) to refer on how to set the employee range.
  - j. **Last Run Time** – This is last running time of the reminder.
  - k. **Time Start / End** – The system will send reminder in the timeframe.
  - l. **Enabled** – Tick to enable the reminder.
  - m. **Last Update By** – Username and timestamp of who did the last update.
  - n. **Created By** – Username and timestamp of who created the reminder.
3. Click **Update** button to save the changes.

## Crediting of Leave

This feature can be used to credit leave for different leave types, with *leave nature* defined as 'Annual Leave' or 'Leave With Expiry'.

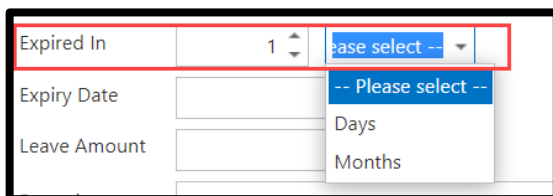
**Access: Leave Module > Leave > Utility > Crediting of Leave**

1. Select Leave in the drop-down window.



2. Define the value for the fields as below:

- a. **Date of Origin** – Define the date of leave.
- b. **Expired In** – If this field is defined with value, system will auto compute the **Date Expiry** and is editable. The value can be defined by:
  - Days
  - Months



- c. **Date Expiry** – Date Expiry will be derived from Date Origin as follows:

Date Expiry = Date Origin + x days/months – 1 day

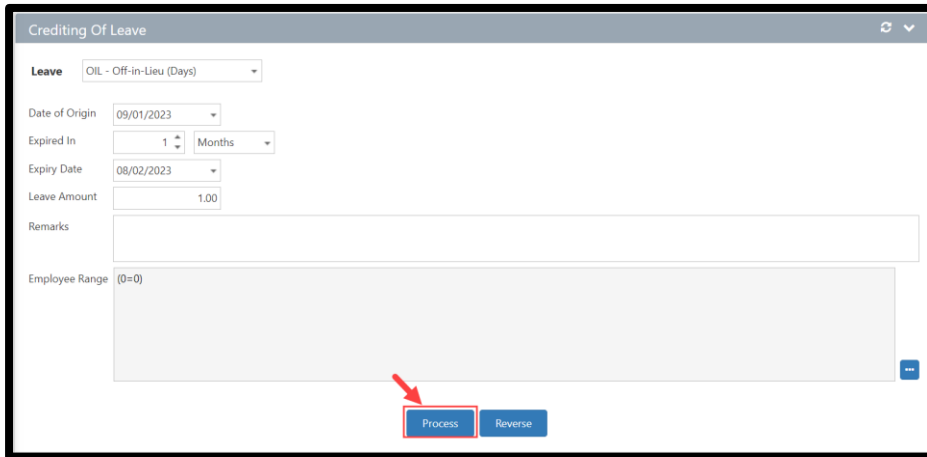
Example:

Date Origin	Expired In	Date Expiry
10/12/2023	1 day	10/12/2023
10/12/2023	1 month	09/01/2024

- d. **Leave Amount** – Define how many days or hours of leave need to be credited.
- e. **Remarks** – Input the remark.
- f. **Employee Range** – Define the employee range that will entitle for this leave.

[Click here](#) to refer on how to set the employee range.

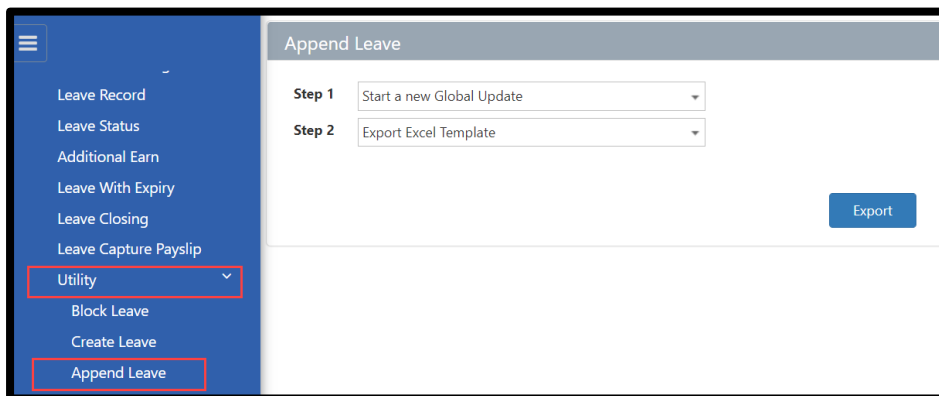
3. Click **Process** button and system will credit the leave to the specific group employees.



## Append Leave

**Append Leave** is used by admin user and leave records upload can also be done by using an excel template. All the leave records will be auto approved after import into system.

**Access:** *Leave Module > Leave > Utility > Append Leave*



1. Export the excel template from system.
  - a. **Start a new Global Update.**
  - b. Click **Export Excel Template.**
  - c. Click **Export.** System will export excel template for import.

Sample Template:

A	B	C	D	E	F	G	H	I	J
EmployeeCode	LeaveCode	DateStart	DateEnd	HalfStart	HalfEnd	TimeStart	TimeEnd	LeaveAmount	Remarks

- **EmployeeCode** – (mandatory) Define the employee code.
  - **LeaveCode** - (mandatory) Enter the code and it cannot contain blank spaces.
  - **DateStart** - (mandatory) Insert the Leave Start Date.
  - **DateEnd** - (mandatory) Insert the Leave End Date.
  - **HalfStart** - (mandatory when leave type is Day) If leave starts in morning, may fill in with value “AM”.
  - **HalfEnd** - (mandatory when leave type is Day) If leave starts in morning, may fill in with value “PM”.
  - **TimeStart** - (mandatory when leave type is Hours) Insert the Leave start time.
  - **TimeEnd** - (mandatory when leave type is Day) Insert the Leave end time.
  - **LeaveAmount** - Total leave days or leave hours that need to credit to employee.
2. Once the excel file is updated with data, import the excel file.
    - a. Click **Start a new Global Update**.
    - b. Click **Append from Excel**.
    - c. Click **Browse**, select append leave template.

**Append Leave**

**Step 1** Start a new Global Update

**Step 2** Append from Excel  Append Hour Leave to Respect Shift Setting

**Step 3**

Uploaded Files

Excel File Select a file...

Upload

Excel Fields Mandatory: EmployeeCode, LeaveCode, DateStart, DateEnd  
If the leave unit is in hour, TimeStart and TimeEnd is mandatory.  
If the leave unit is in day, HalfStart and HalfEnd is mandatory. Valid values: AM or PM

Optional: LeaveAmount

3. Then click **Upload** after select template.

**Append Leave**

**Step 1** Start a new Global Update

**Step 2** Append from Excel

**Step 3**

Uploaded Files

Excel File Append Leave Template.xlsx

**Upload**

Excel Fields Mandatory: EmployeeCode, LeaveCode, DateStart, DateEnd  
If the leave unit is in hour, TimeStart and TimeEnd is mandatory.  
If the leave unit is in day, HalfStart and HalfEnd is mandatory. Valid values: AM or PM

Optional: LeaveAmount

4. After upload file, it will display in **Uploaded Files**.

**Append Leave**

**Step 1** Start a new Global Update

**Step 2** Append from Excel

**Step 3**

Uploaded Files Append Leave Template.xlsx

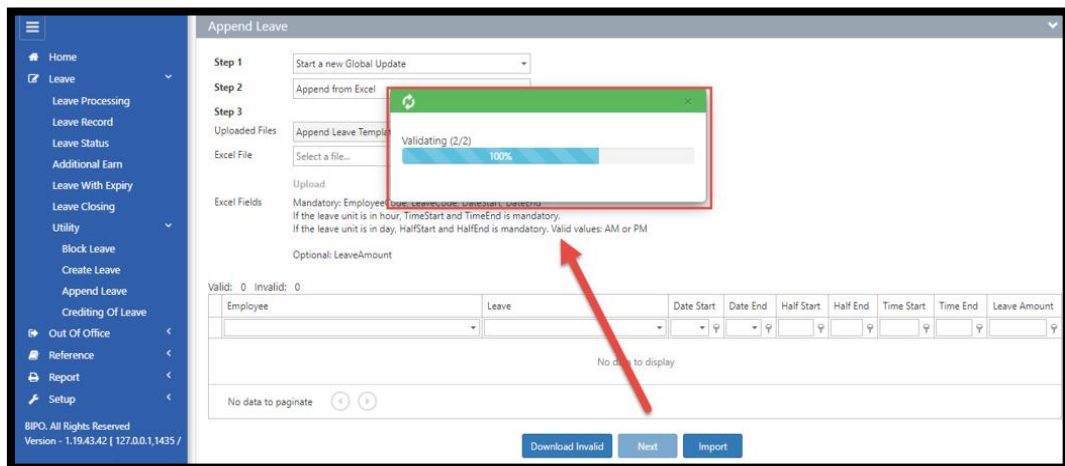
Excel File Select a file...

Upload

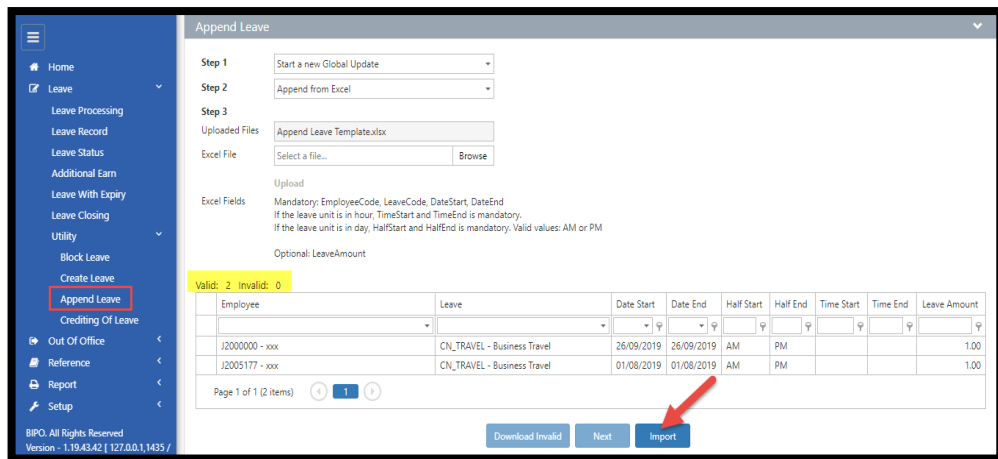
Excel Fields Mandatory: EmployeeCode, LeaveCode, DateStart, DateEnd  
If the leave unit is in hour, TimeStart and TimeEnd is mandatory.  
If the leave unit is in day, HalfStart and HalfEnd is mandatory. Valid values: AM or PM

Optional: LeaveAmount

5. Click **Next**, then system will check leave data whether is correct or not.

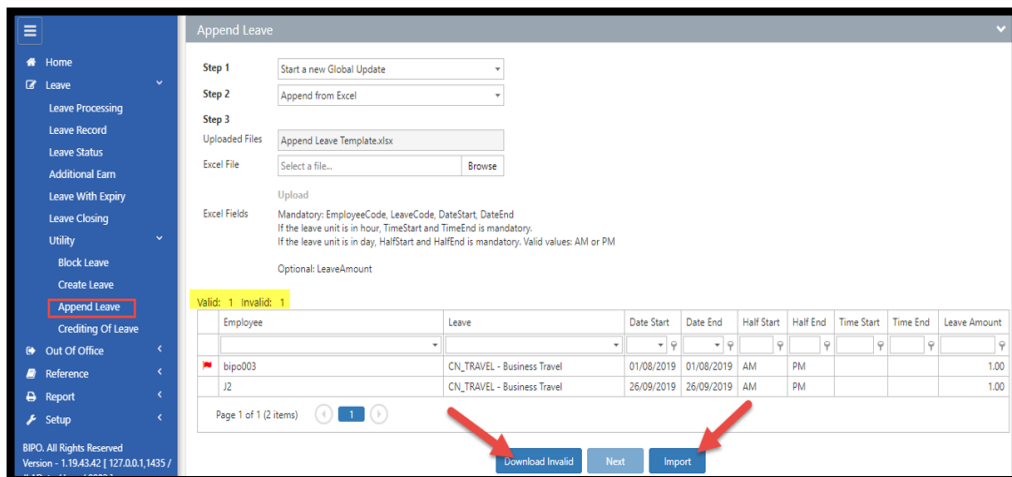


- a. If all leave data in template is correct (Invalid is 0), then can click “Import”, system will import leave records into system.

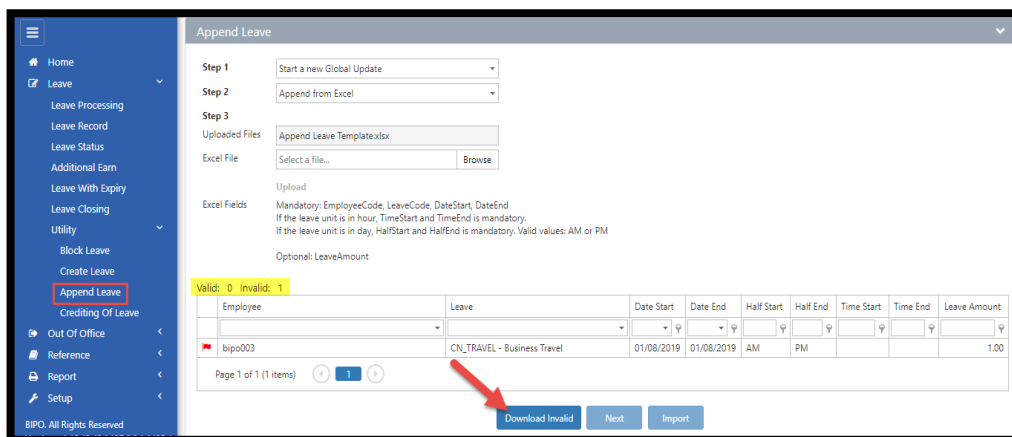


- b. If some of leave data in template is correct and others have issue (Valid and Invalid both > 0), which means some leave data maybe duplicate or have some mistakes in template.

- Click **Download Invalid** to view the incorrect records and can modify data based on the remarks.
- Click **Import** to import the correct leave records.
- Repeat step 1 to import the invalid data.



- c. if all leave data in template is invalid (Valid = 0), which means cannot import any data into system. Need to click “Download Invalid” to view the incorrect records and can modify data based on the remarks.

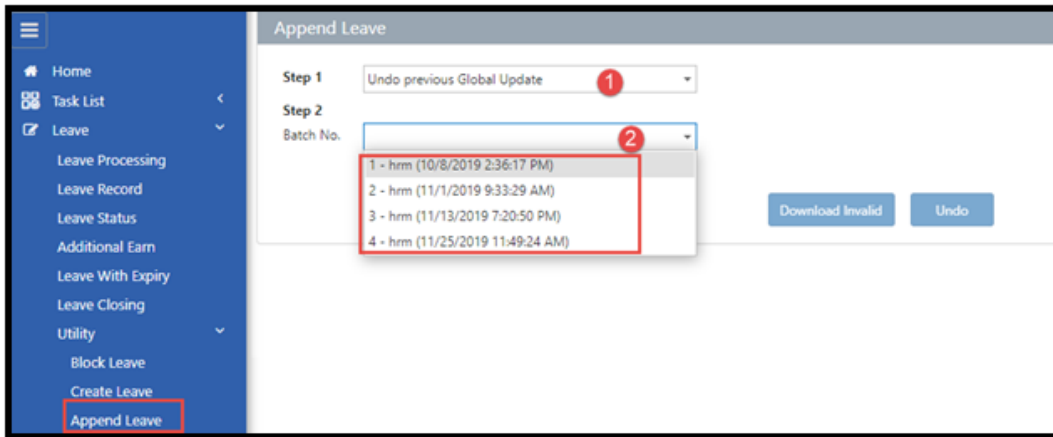


### Undo Steps:

If unpaid leave records have already interfaced to payroll, undo can still process. Please take note that once undo the leave import, it needs to do payroll processing to interface unpaid leave again. Otherwise, the interface records are not correct and will impact payroll result.

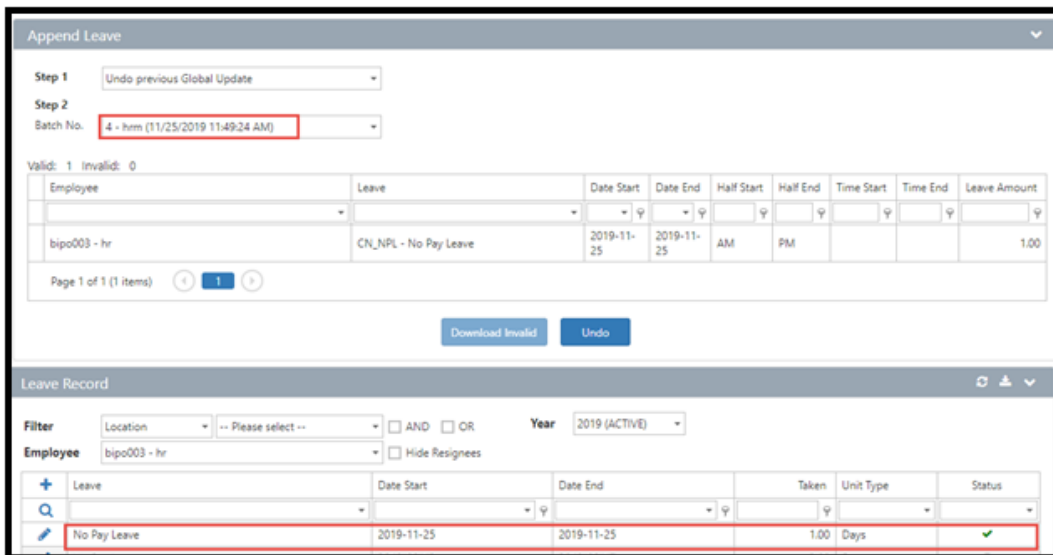
1. Click **Undo previous Global Update**.
2. Select one import history in **Batch No**.

**Badge No.** will display all historical import time, and if admin user never appends leave before, then it will be blank under **Batch No**.

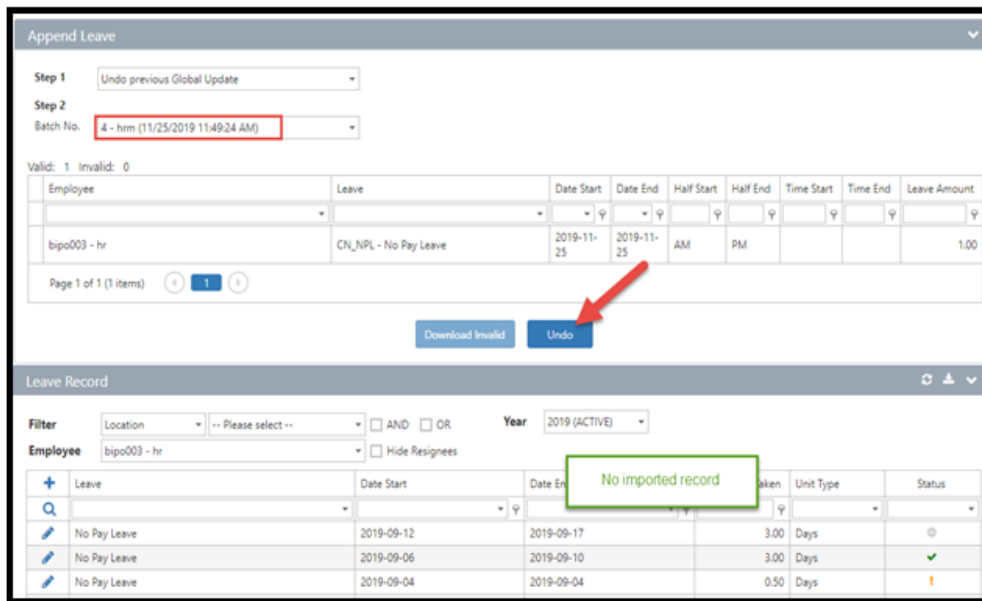


3. Select one import history in **Batch No.**

Then system will bring the detail leave records below.



4. Click **Undo**, then the imported record will undo and display in record screen.



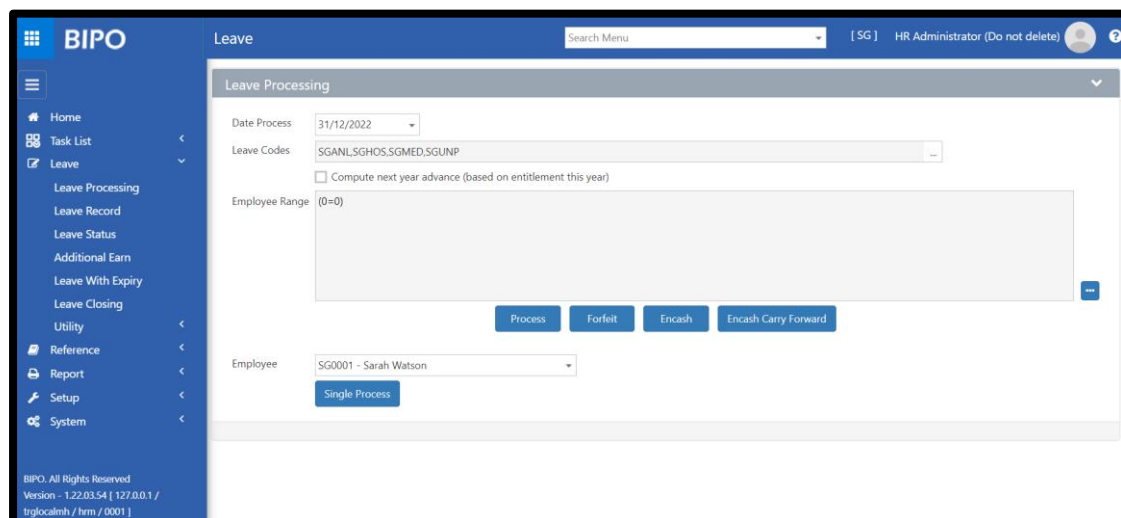
## Leave Processing

**Leave Processing** is used to calculate the earn leave of the employee based on company / statutory policy setup. This page aims to process for Leave Earn, *Leave Forfeiture*, *Leave Encash*, *Encash Carry Forward*. For new staff, leave entitlement is computed and for resigned staff, the earn leave is calculated up to the *Exit Date*. System has a *Scheduled Job* to do processing automatically. Project consultant will set it in the scheduler to run it every day.

**Note:** This processing cannot be cancelled or withdrawn once proceed.

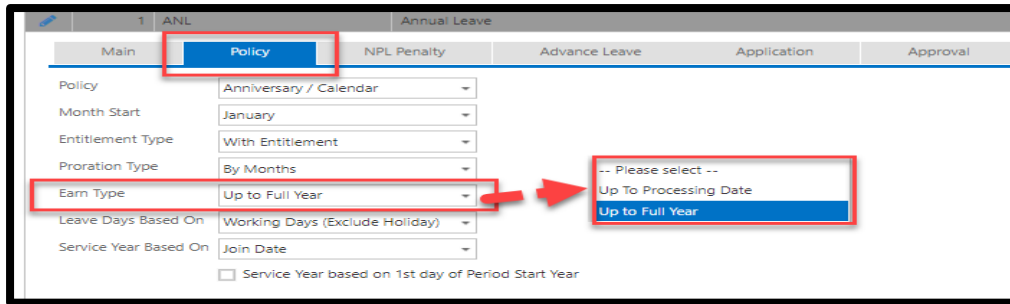
## Mass Leave Processing

**Access:** *Leave Module > Leave > Leave Processing*



**Date Process** - Input the date for processing. This date will be referenced when processing earn leave, leave year end forfeiture, leave year end encashment, leave year end encash carry forward. Date value will also refer to *Leave Policy setup*, i.e. *Earn Type = Up to Full Year or Up to Processing Date* (Refer to screenshot below).

**Access:** Reference > Leave > Policy tab



Example:

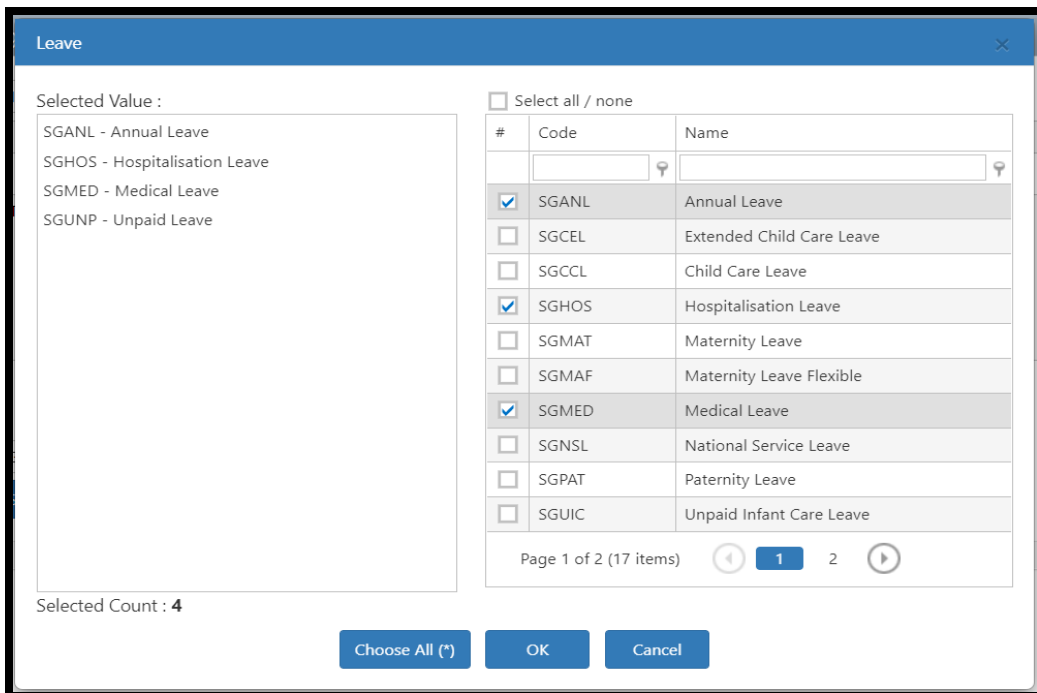
If *Earn Type=Up to Processing Date*, system will process the balance up to the specified date stated in *Date Process*. To calculate the month end balance, input the last day of the month.

If *Earn Type=Up to Full Year*, system will process the balance up to end of the year. To calculate the full year balance, input date value as 31/12/20XX.

2. **Leave Codes:** Default is all leave codes, where the \* indicates all selection. Otherwise, select the leave code(s) to be process. Click  to specify the leave codes.



Click *Choose All (\*)*, it will display \* in *Leave Codes*. Or select the specific leave code i.e. SGANL Annual Leave to only update annual leave balance.



3. **Compute next year advance (Based on this year's entitlement):** Tick the checkbox for system will generate the next year advance entitlement, based on the entitlement for the current processing year.

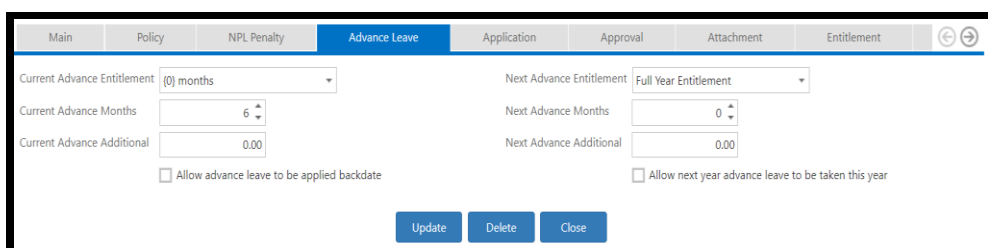
Example:

User need to apply 2021's leaves when it's still year 2020, system will not allow user to apply for next year unless doing leave processing for next year.

Follow the steps below to allow leave process for the following year:

- a. Set advance rules in *Leave Master – Advance Leave*

**Access: Reference > Leave > Advance Leave tab**



- b. Tick  Compute next year advance (based on entitlement this year)
- c. Set the employee range.
4. Click **Process.Employee Range:** Indicate the employee range for processing.
5. **Process:** Click this button to execute the *earn leave processing*, based on the values defined. If user only need to process for one employee, after selecting date process

and leave code, user can directly select employee in **Employee field** and click **Single Process**.

6. **Forfeit:** Click this button to execute the *leave year end forfeiture processing*, based on the values defined.
7. **Encash:** Click this button to execute the *leave year end encashment processing*, based on the values defined.
8. **Encash Carry Forward:** Click this button to *execute the leave year end encashment carry forward processing*, based on the values defined.

## Single Leave Processing

This is alternative option to use if user prefer to process single employee directly. Usually, this method is used when there is amendment/update after the leave has been processed. This is more time efficient and accuracy in calculating employee's earned leave instead of processing all employee again.

### Note:

If need to process next year's leave balance, for example user need to apply 2020's leaves when it's still year 2019, system will not allow user to apply for next year unless doing leave processing for next year. Need to follow below steps:

1. Set advance rules in *Leave Master – Advance Leave*. (can refer to User Guide – [Advance Leave Tab](#)).

2. Tick the checkbox of **“Compute next year advance (based on this year's entitlement)”**.

3. Define value for fields as below:
  - c. **Date Process**
  - d. **Leave Codes**
  - e. **Employee Range**
4. Click **Process** to calculate leave balance of next year.

## ESS Apply Leave

Following are the steps for employee to apply leave in ESS screen:

**Access: ESS > Leave > Apply Leave**

1. Input the **Leave Start** and **Leave End** and click **Calculate Days** button. Fields that

have red \* is a mandatory field to fill in.

2. Click **Submit** button to send for approval or **Save Draft** button.

**Note:** Employees can select backup person when apply leave by configure this field under **System > Config > Leave > Leave Request > BackupPersonEmployeeField**.

The value for this field by default is blank and employees will not be able to view this field under ESS view. If there is value update in this config, employee will be able to view this field when applying leave.

**Example:** If config is set as SG=Country

When SG Employees apply leave under ESS screen, **Backup** field will appear with all employees under SG country available for selection.

When ID Employees apply leave under ESS screen, **Backup** field is hidden as is not updated in the config value.

## Leave Status


### Configure Leave Status Grid Table





Leave Code	Leave Name	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	Pending Approval
No data to display										

Fields display in leave status as above screenshot can be configured in system. Following are the steps for Administrator to edit the fields in leave status:

**Note:** This configuration reflects in both Admin and ESS view.

**Access:** Leave Module > Setup > Setting > Field Selection > Select: Leave Status List

1. Click on the **+** button to add in new field.
  - a) **No** – This is the sequence order of field to display in leave status.
  - b) **Field** – Select the field from the drop-down list.
  - c) **Countries/Region** – Can be define as all countries or specific country only.
  - d) **Width In Pixel** – Define the column with display in leave status table.
  - e) **Hide in ESS** – If this checkbox is ticked, the respective field will be hidden in ESS view.
2. Click **Update** button to save it.
3. Click on the  button to edit the existing field.

	No.	Field	Countries/Regions
	1	Leave Name	*
	4	Unit Type	*
	5	C/F	*
	6	C/F Taken	*

4. Click **Update** button to save it.

## Configure Leave Status Detail

Fields display in leave status detail when user click magnifier icon as above screenshot can be configured in system.

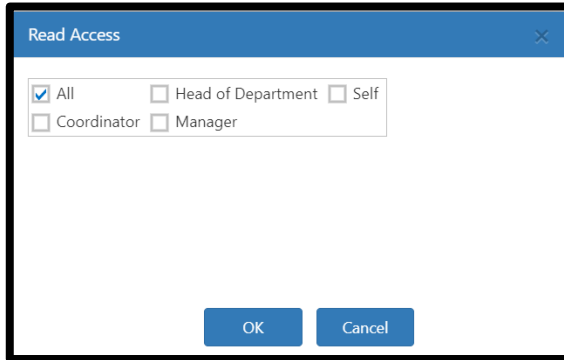
Following are the steps for Administrator to edit the fields in leave status:

**Note:** This configuration only reflects in ESS view.

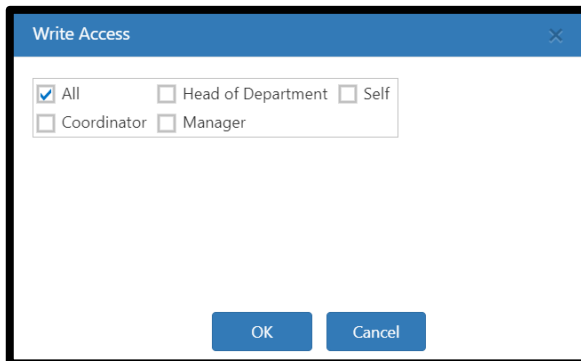
**Access:** Leave Module > Setup > Setting > Field Selection > Select: Leave Status Detail


1. Click on the **+** button to add in new field.
  - f) **No** – This is not a sequence order of field to display in leave status, system will display the field with default sequence if it is added in **Leave Status Detail**.
  - g) **Field** – Select the field from the drop-down list.
  - h) **Countries/Region** – Can be define as all countries or specific country only.

i) **Read Access** – is used to give access to the user for viewing.



j) **Write Access** – is used to give access to the user for editing.

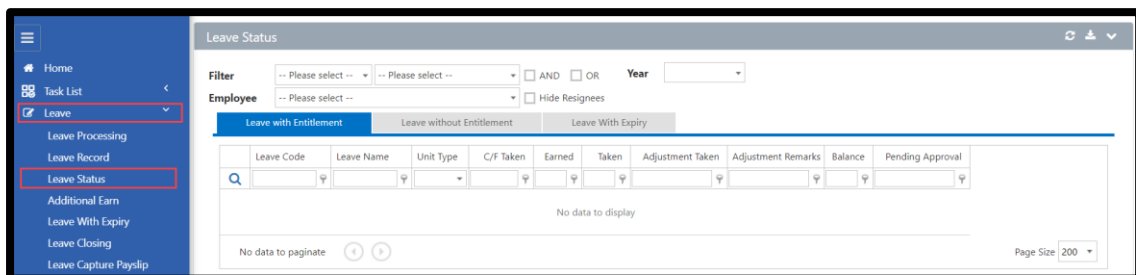


2. Click **Update** button to save it.
3. Click on the  button to edit the existing field.

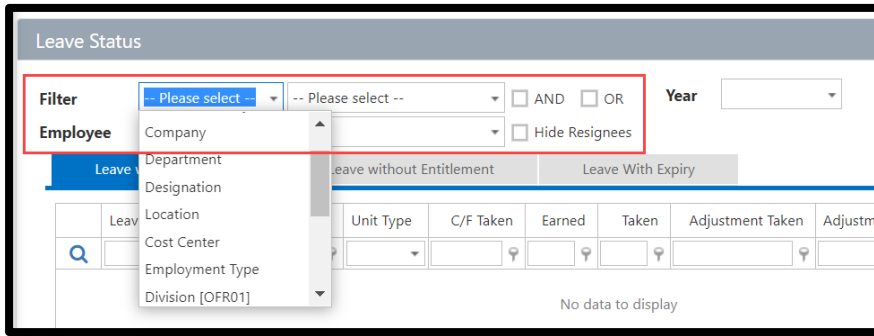
## View Employee’s Leave Status

Following are the steps for Administrator to view the employee’s leave status:

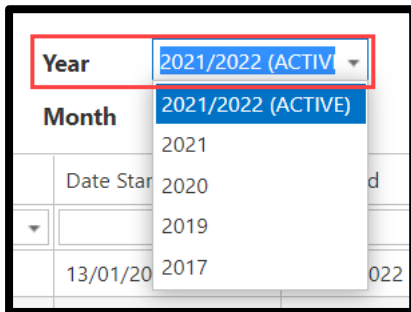
**Access: Leave Module > Leave > Leave Status**



1. User has the option to filter by certain organization field (Company, Department, Designation, etc.) or to select specific employee from the drop-down list.



2. Click on **Year** drop-down field to view the leave status for specific leave period. The year with the word (Active) refers to the current active year.



3. Administrator can sort the display of the leave status by clicking on the field name, e.g., the following is showing that the display is sorted by Leave Code field.

Leave with Entitlement												
Employee	Leave Code	Leave Name	Parent Leave	Unit Type	C/F Taken	Earned	Taken	Time-Off Taken	Adjustment Taken	Adjustment Remarks	Bala	
1004 - Zanaria Zana	ADPL	Adoption Leave		Days	0.00	0.00	0.00	0.00	0.00			
1007 - Chen Kelly	ADPL	Adoption Leave		Days	0.00	0.00	0.00	0.00	0.00			
1020 - Employee 1020	ADPL	Adoption Leave		Days	0.00	0.00	0.00	0.00	0.00			

4. Administrator can also filter specific leave by typing the leave code/name under the magnifying icon bar.

Employee	Leave Code	Leave Name	Parent Leave	Unit Type	C/F Taken	Earned	Taken	Time-Off Taken	Adjustment Taken	Adjustment Remarks	Bala
1001 - John Tan	AL2	Annual Leave		Days	0.00	14.00	0.00	0.00	0.00		1
1002 - James Lee	AL2	Annual Leave		Days	0.00	14.00	0.00	0.00	0.00		1
1003 - Johan Yakob	AL2	Annual Leave		Days	0.00	14.00	0.00	0.00	0.00		1


5. The on-screen result can be downloaded into excel format by clicking on the download button on the right top corner.

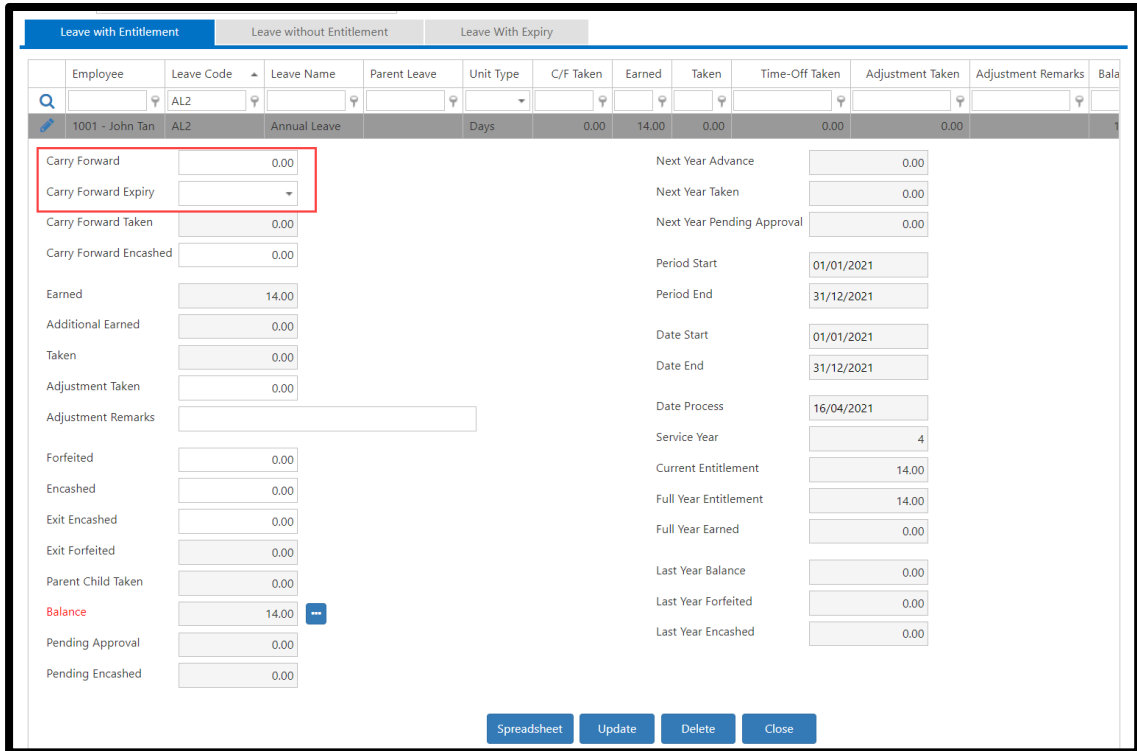
## Update Employee's Leave Status

Following are the steps for Administrator to update the employee's leave status for a

specific leave code:

**Access: Leave Module > Leave > Leave Status**

1. Select specific employee from the drop-down list.
2. Click on the  button corresponding to the leave to be updated.
3. User may update some of the fields (Carry Forward, Carry Forward Expiry, etc.) depending on the user's access right.



Employee	Leave Code	Leave Name	Parent Leave	Unit Type	C/F Taken	Earned	Taken	Time-Off Taken	Adjustment Taken	Adjustment Remarks	Bala
1001 - John Tan	AL2	Annual Leave		Days	0.00	14.00	0.00	0.00	0.00		

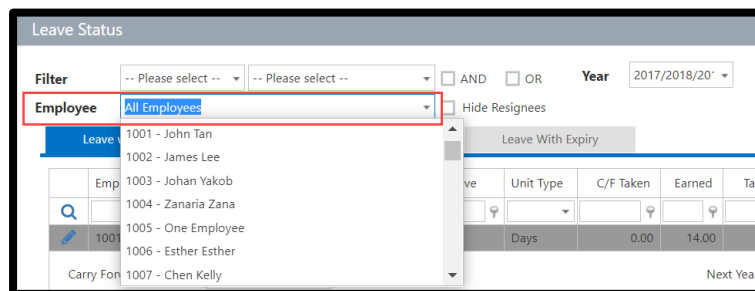
Carry Forward	0.00	Next Year Advance	0.00
Carry Forward Expiry		Next Year Taken	0.00
Carry Forward Taken	0.00	Next Year Pending Approval	0.00
Carry Forward Encashed	0.00	Period Start	01/01/2021
Earned	14.00	Period End	31/12/2021
Additional Earned	0.00	Date Start	01/01/2021
Taken	0.00	Date End	31/12/2021
Adjustment Taken	0.00	Date Process	16/04/2021
Adjustment Remarks		Service Year	4
Forfeited	0.00	Current Entitlement	14.00
Encashed	0.00	Full Year Entitlement	14.00
Exit Encashed	0.00	Full Year Earned	0.00
Exit Forfeited	0.00	Last Year Balance	0.00
Parent Child Taken	0.00	Last Year Forfeited	0.00
<b>Balance</b>	14.00	Last Year Encashed	0.00
Pending Approval	0.00		
Pending Encashed	0.00		

4. Click on the **Update** button to save the changes.

### Delete Employee's Leave Status

**Access: Leave Module > Leave > Leave Status**

Select specific employee from the drop-down list.



Leave Status

Filter: -- Please select -- AND OR Year: 2017/2018/20

Employee: All Employees

Hide Resignees


Leave	Emp	Unit Type	C/F Taken	Earned	Taken
1001 - John Tan		Days	0.00	14.00	


### Leave with Entitlement


Following are the steps for Administrator to delete the employee's leave status for a specific leave code under Leave with Entitlement:

**Access: Leave Module > Leave > Leave Status**

1. Select **Leave with Entitlement** tab.

	Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned
	SGANL	Annual Leave		Days	7.00	0.00	14.00

2. Click on the  button corresponding to the leave to be deleted.
3. Click on the **Delete** button.

1001 - John Tan	AL2	Annual Leave	Days	0.00	14.00	0.00	0.00
Carry Forward	<input type="text" value="0.00"/>	Next Year Advance	<input type="text" value="0.00"/>				
Carry Forward Expiry	<input type="text"/>	Next Year Taken	<input type="text" value="0.00"/>				
Carry Forward Taken	<input type="text" value="0.00"/>	Next Year Pending Approval	<input type="text" value="0.00"/>				
Carry Forward Encashed	<input type="text" value="0.00"/>	Period Start	<input type="text" value="01/01/2021"/>				
Earned	<input type="text" value="14.00"/>	Period End	<input type="text" value="31/12/2021"/>				
Additional Earned	<input type="text" value="0.00"/>	Date Start	<input type="text" value="01/01/2021"/>				
Taken	<input type="text" value="0.00"/>	Date End	<input type="text" value="31/12/2021"/>				
Adjustment Taken	<input type="text" value="0.00"/>	Date Process	<input type="text" value="16/04/2021"/>				
Adjustment Remarks	<input type="text"/>	Service Year	<input type="text" value="4"/>				
Forfeited	<input type="text" value="0.00"/>	Current Entitlement	<input type="text" value="14.00"/>				
Encashed	<input type="text" value="0.00"/>	Full Year Entitlement	<input type="text" value="14.00"/>				
Exit Encashed	<input type="text" value="0.00"/>	Full Year Earned	<input type="text" value="0.00"/>				
Exit Forfeited	<input type="text" value="0.00"/>	Last Year Balance	<input type="text" value="0.00"/>				
Parent Child Taken	<input type="text" value="0.00"/>	Last Year Forfeited	<input type="text" value="0.00"/>				
<b>Balance</b>	<input type="text" value="14.00"/> 	Last Year Encashed	<input type="text" value="0.00"/>				
Pending Approval	<input type="text" value="0.00"/>						
Pending Encashed	<input type="text" value="0.00"/>						

**Note:** The leave status will be created again when user run the leave processing if the employee is entitled for the leave.

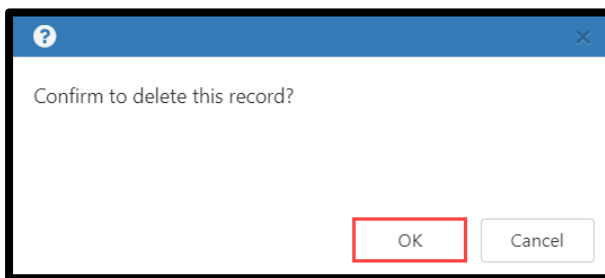
### Leave without Entitlement

Following are the steps for Administrator to delete the employee's leave status for a specific leave code under Leave without Entitlement:

1. Select **Leave without Entitlement** Tab.

	Leave Code	Leave Name	Unit Type	Take
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	SGNSL	National Service Leave	Days	0.0
	SGUNP	Unpaid Leave	Days	0.0
	SGBIZ	Work Travel	Days	0.0

4. Click on the button corresponding to the leave to be deleted.
5. An alert message will prompt out, click **OK** button.



## Leave Record

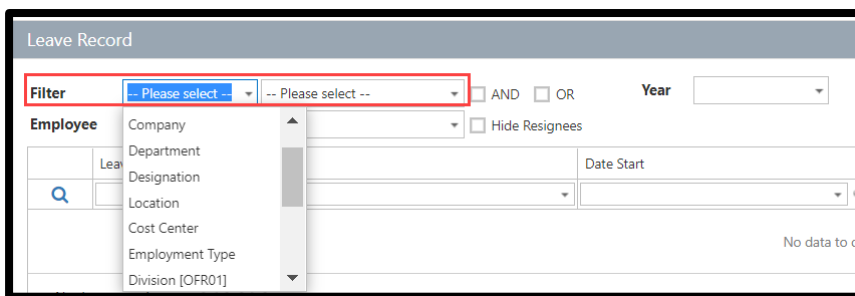
**Leave Record** in the *Leave* module is used to view employee's leave record, which are the days that the employee is on leave and the type of leave that the employee applied.

### View Employee's Leave Record

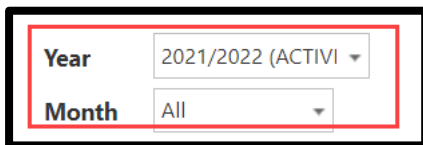
Following are the steps for Administrator to view the employee's leave record:

**Access: Leave Module > Leave > Leave Record**

1. User has the option to filter by certain organization field (Company, Department, Designation, etc.) or to select specific employee from the drop-down list.



2. Click on the **Year** or **Month** drop-down field to view the leave record for specific leave period. The year with the word (Active) refers to the current active year.




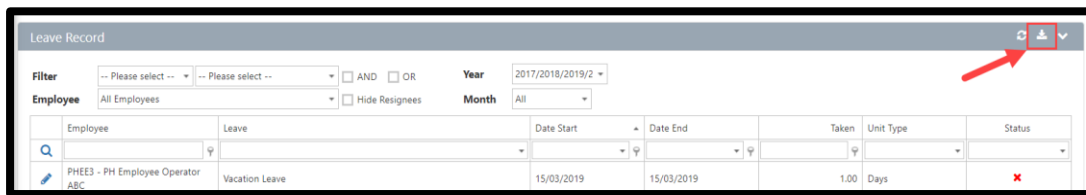
3. Administrator can sort the display of the leave record by clicking on the field name, e.g., the following is showing that the display is sorted by the Date Start field in ascending manner:

Employee	Leave	Date Start	Date End	Taken	Unit Type	Status
PH EE3 - PH Employee Operator ABC	Vacation Leave	15/03/2019	15/03/2019	1.00	Days	✘
PH EE3 - PH Employee Operator ABC	Sick Leave	01/04/2019	01/04/2019	1.00	Days	✘
PH EE3 - PH Employee Operator ABC	Sick Leave	22/05/2019	24/05/2019	3.00	Days	✘
PH EE4 - PH Employee Operator XYZ	Sick Leave	08/07/2019	08/07/2019	1.00	Days	!
PH EE4 - PH Employee Operator XYZ	Sick Leave	11/07/2019	11/07/2019	1.00	Days	✓
PH EE3 - PH Employee Operator ABC	Vacation Leave	12/07/2019	12/07/2019	1.00	Days	✓
PH EE3 - PH Employee Operator ABC	Child Care Leave	18/07/2019	19/07/2019	2.00	Days	!

4. Administrator can also filter specific leave, date, or approval status by selecting from the drop-down value under the magnifying icon bar.

Employee	Leave	Date Start	Date End	Taken	Unit Type	Status
PH EE3 - PH Employee Operator ABC	Vacation Leave	15/03/2019	15/03/2019	1.00	Days	Approved
PH EE3 - PH Employee Operator ABC	Sick Leave	01/04/2019	01/04/2019	1.00	Days	Rejected
PH EE3 - PH Employee Operator ABC	Sick Leave	22/05/2019	24/05/2019	3.00	Days	Canceled
PH EE4 - PH Employee Operator XYZ	Sick Leave	08/07/2019	08/07/2019	1.00	Days	Withdrawn
						Pending Approval
						Pending Cancelation
						Pending Submission

- The on-screen result can be downloaded into excel format by clicking on the  icon on the right top corner.

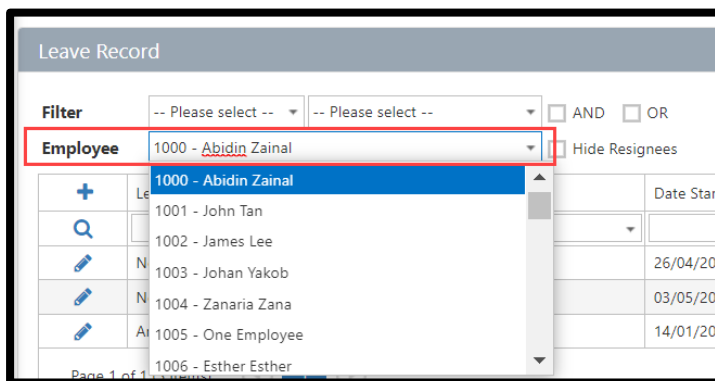


## Add Employee's Leave Record

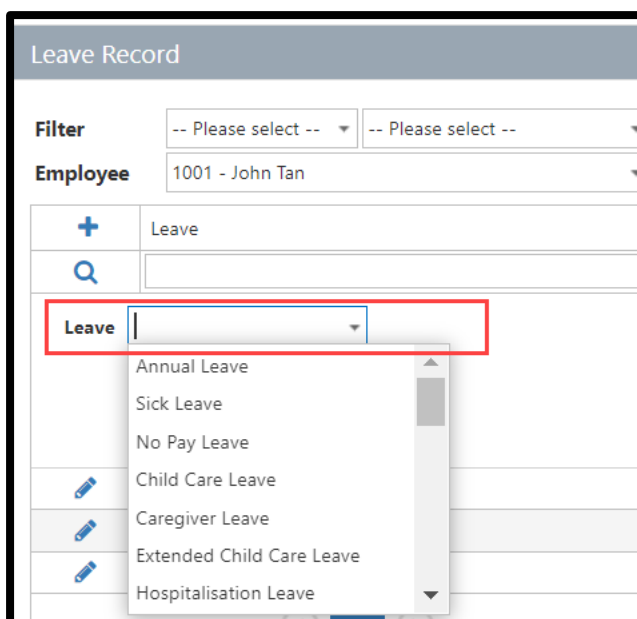
Following are the steps for Administrator to add employee's leave record:

**Access: Leave Module > Leave > Leave Record**

- Select specific employee from the drop-down list.



- Click **+** to add new leave record for the selected employee.
- Select the Leave Type from the drop-down list.



- Fill in the required information (Leave Start, Leave End, Remarks). Alternatively, user may define the leave period by clicking the dates on the Calendar and system will

populate the leave dates accordingly.

The screenshot shows a form for creating a leave request. The 'Leave' type is set to 'Annual Leave'. The 'Leave Start' is 09/01/2022, 'Leave End' is 09/01/2022, and 'Leave Days' is 0. There are dropdown menus for '1st Half' and '2nd Half'. Below these are fields for 'Attachment', 'CC List', and 'Remarks'. A green message at the bottom says 'Please apply leave at least 1 day before.'

5. Click on the **Calculate Days**. System will automatically compute the total number of days applied based on employee's work pattern.

This screenshot shows the same form as above, but with the 'Calculate Days' button highlighted by a red arrow. The 'Leave End' field is now 09/01/2022. To the right, there is a 'Status' table and an 'Approval' table.

Taken	Pending Approval	Balance
1.00	0.00	37.00

Level	Name	Date	Action	Remarks
No data to display				

At the bottom, there are buttons for 'Calculate Days' (highlighted with a red arrow) and 'Close'.

6. Click on the **Update** button to save the record.

This screenshot shows the form after clicking 'Calculate Days'. The 'Leave Days' field is now 1. The 'Status' table and 'Approval' table are the same as in the previous screenshot. A new 'Details' table has appeared at the bottom right.

Leave Date	Shift	Days	Remarks
07/01/2022 (Fri)	Shift_ACCT 0900-1800 (Work)	1.00	

At the bottom, there are buttons for 'Save Draft', 'Update' (highlighted with a red arrow), and 'Close'.

7. Leave will be automatically approved if created by Administrator.


## Update Employee's Leave Record

Following are the steps for Administrator to add employee's leave record:

**Access: Leave Module > Leave > Leave Record**

1. Select specific employee from the drop-down list.

The screenshot shows the 'Leave Record' page with a filter section. The 'Employee' dropdown menu is open, displaying a list of employees. The first option, '1000 - Abidin Zainal', is selected and highlighted in blue. A red rectangular box highlights the dropdown menu area.

2. Click on the  button corresponding to the leave to be updated. Leave Start/ End and Remarks can be changed.

The screenshot shows the 'Annual Leave' form for employee '1000 - Abidin Zainal'. The form includes fields for 'Leave Start' (14/01/2022), 'Leave End' (14/01/2022), 'Leave Days' (1.00), 'Attachment', 'CC List', and 'Remarks'. A red rectangular box highlights the 'Leave Start' and 'Leave End' fields. Another red rectangular box highlights the 'Remarks' field.

3. Click on the **Calculate Days** button for system to re-compute the total days.

The screenshot shows the 'Annual Leave' form. The 'Leave Start' is 13/01/2022 (1st Half) and 'Leave End' is 13/01/2022 (2nd Half). The 'Leave Days' field is currently 0. A red arrow points to the 'Calculate Days' button at the bottom of the form.

Status		
Taken	Pending Approval	Balance
1.00	0.00	37.00

Approval				
Level	Name	Date	Action	Remarks
	1001 - John Tan	10/01/2022 (Mon) 16:44:36	Submitted	
1	1000 - Abidin Zainal	10/01/2022 (Mon) 16:48:20	Approved	

Buttons at the bottom: Calculate Days, Download, Cancel, Delete, Close.

4. Click on the **Update Without Approve** button to save the changes.

The screenshot shows the 'Annual Leave' form after the 'Calculate Days' button was clicked. The 'Leave Days' field is now 1. A red arrow points to the 'Update Without Approve' button at the bottom of the form.

Status		
Taken	Pending Approval	Balance
1.00	0.00	37.00

Approval				
Level	Name	Date	Action	Remarks
	1001 - John Tan	10/01/2022 (Mon) 16:44:36	Submitted	
1	1000 - Abidin Zainal	10/01/2022 (Mon) 16:48:20	Approved	

Details			
Leave Date	Shift	Days	Remarks
13/01/2022 (Thu)	Shift_ACCT 0900-1800 (Work)	1.00	

Buttons at the bottom: Download, Update Without Approve, Cancel, Delete, Close.

## Delete Employee's Leave Record

Following are the steps for Administrator to delete employee's leave record:

**Access: Leave Module > Leave > Leave Record**

1. Select specific employee from the drop-down list.

The screenshot shows the 'Leave Record' list. The 'Employee' dropdown menu is open, and '1000 - Abidin Zainal' is selected. A red box highlights the dropdown menu.

Employee	Date Start
1000 - Abidin Zainal	
1001 - John Tan	
1002 - James Lee	
1003 - Johan Yakob	26/04/20
1004 - Zanaria Zana	03/05/20
1005 - One Employee	14/01/20
1006 - Esther Esther	

2. Click on the  button corresponding to the leave record to be deleted.

3. Click on the **Delete** button to delete the leave record.

The screenshot shows a leave record form with the following sections:

- Leave Start:** 13/01/2022, 1st Half
- Leave End:** 13/01/2022, 2nd Half
- Leave Days:** 1
- Status:**

Taken	Pending Approval	Balance
1.00	0.00	37.00
- Approval:**

Level	Name	Date	Action	Remarks
	1001 - John Tan	10/01/2022 (Mon) 16:44:36	Submitted	
1	1000 - Abidin Zainal	10/01/2022 (Mon) 16:48:20	Approved	
- Details:**

Leave Date	Shift	Days	Remarks
13/01/2022 (Thu)	Shift_ACCT 0900-1800 (Work)	1.00	

Buttons at the bottom: Download, Update Without Approve, Cancel, **Delete** (highlighted), Close.

## Additional Earn

This function allows HR admin to add in additional leave or additional earned entitlement for the employees and it's only applicable for leave type with entitlement.

**Access:** Leave Module > Leave > Additional Earn

The screenshot shows the 'Additional Earn' module with the following elements:

- Sidebar:** Home, Task List, Leave (highlighted), Leave Processing, Leave Record, Leave Status, Additional Earn (highlighted), Leave With Expiry, Leave Closing, Leave Capture Payslip.
- Filter:** -- Please select --, -- Please select --, AND, OR
- Employee:** -- Please select --, Hide Resignees
- Table:**

Leave	Date of Origin	Unit Type	Leave Amount	Remarks
No data to display				
- Page Size:** 200

2. Select the employee for adding additional earn, user may utilise the filter in selecting employee.

3. Once employee is selected, click the **+** button.

The close-up shows the 'Additional Earn' form with the following details:

- Filter:** Company, BIPOMY - BIPO Service Malay, AND, OR
- Employee:** 1001 - John Tan
- Buttons:** **+** (highlighted), Hide Resignees
- Table:**

Leave	Date of Origin	Unit Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

+	Leave	Date of Origin	Unit Type	Leave Amount	Remarks
Q					
	Leave: -- Please select --	Date of Origin:		Leave Amount: 1.00	Remarks:
<input type="button" value="Update"/> <input type="button" value="Close"/>					

6. Define the value for fields as below:
  - a. **Leave** – Select the leave code.
  - b. **Date of Origin** – Insert the date for leave.
  - c. **Remarks** – This field is used to indicate a remark or note.
  - d. **Leave Amount** – Define the number of days/hours of additional earn the employee entitle for.
7. Click the **Update** button to save it.

Leave	ANL - Annual Leave
Date of Origin	01/11/2022
Remarks	Special Earn
Leave Amount	2.00
<input type="button" value="Update"/> <input type="button" value="Close"/>	

8. Go to Leave Processing screen to process the leave for the employee.

**Leave Processing**

Date Process: 31/12/2022

Leave Codes: ANL

Compute next year advance (based on entitlement this year)

Convert the remaining Time-Off balance to days

Employee Range: (0=0)

Process Forfeit Encash Encash Carry Forward

Employee: 1001 - John Tan

Single Process

- Go to Leave Status and search for the employee. Additional Earn is credited to the respective employee.

Employee: 1001 - John Tan  Hide Resignees **Join Date**

Leave with Entitlement | Leave without Entitlement | Leave With Expiry

Leave Code	Leave Name	Parent Leave	Unit Type	C/F Taken	Earned	Taken
ANL	Annual Leave		Days	0.00	38.00	
Carry Forward		0.00				
Carry Forward Expiry						
Carry Forward Taken		0.00				
Carry Forward Encashed		0.00				
Earned		38.00				
Additional Earned		2.00				
Taken		1.00				

### Leave With Expiry (Off-in-Lieu)

Similar feature as additional earn but this screen is for crediting leave that has an expiry date. This is only applicable for **Leave Nature** equal to **Leave With Expiry**. Employee must utilize or apply the leave within a certain period of time.

## Crediting Leave With Expiry for Individual Employee by Administrator

**Access:** *Leave Module > Leave > Leave With Expiry*

- Utilize the filter feature and search for the employee that wish to add in the leave.

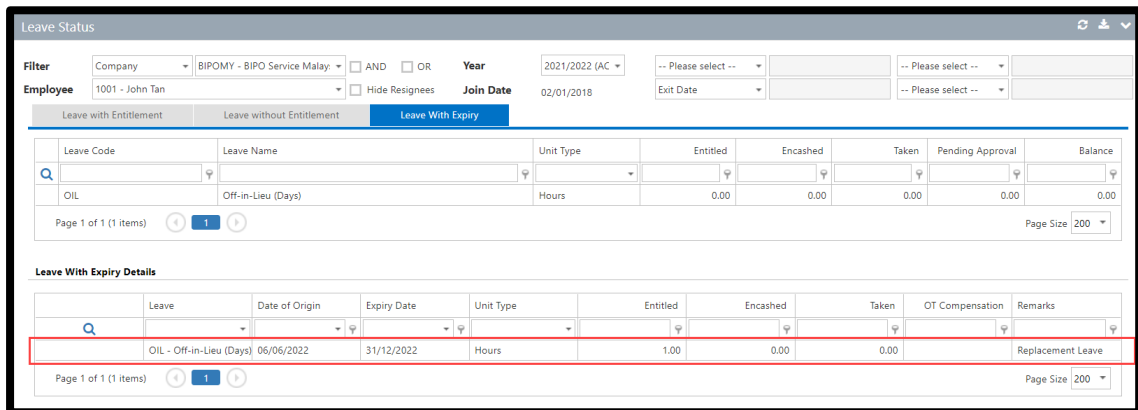
- Once employee is selected, click the **+** button.

- Define the value for fields as below:

- Leave** - System will show the list of leave code with Leave With Expiry Nature.
- Date of Origin** - This is to indicate the date origin of the leave. For example, employee is given OIL for the overtime that s/he has performed on their Off Day, the Date Origin can be the date they performed the OT.
- Expiry Date** - This is to indicate the expiry date of the leave credited.
- Entitled** - This is to indicate the number of leave days to be credited.
- Remark** – This field is used to indicate a remark or note.

- Click **Update** button to save it.

- Go to *Leave Status* and search for the employee. Select the *Leave With Expiry Tab* and the leave is credited to the respective employee.



### Crediting Leave With Expiry for a Group of Employees by Administrator

Following are the steps for Administrator to credit leave with expiry for a group of employees:

**Access: Leave Module > Leave > Utility > Crediting Of Leave**

1. Navigate to the **Crediting Of Leave** screen.
2. Specify the Leave to be credited. System will show the list of leave code with **Annual Leave** or **Leave With Expiry** Nature.
3. Once leave code has been selected, specify the following:
  - a) **Date of Origin** – This is to indicate the date origin of the leave. For example, for Public Holiday in Lieu, the date origin will be the date of the public holiday.
  - b) **Expired In** – This is to indicate when will the leave credited expired. User can specify the period by specific number of days or months. When specified, system will automatically populate the Expiry Date.

For example, if the leave credited must be utilized within 1 month from the Date of Origin, user can specify the Expired In field as 1 month, as follow:

Date of Origin

Expired In

Expiry Date

- c) **Expired Date** – This is to indicate the specific expiry date of the leave credited. It will be auto populated when Expired In field is defined. Alternatively, user can manually define the expiry date.

For example, the leave credited must be consumed by 31 Dec, user can specify the Date Expiry as 31 Dec 2023.

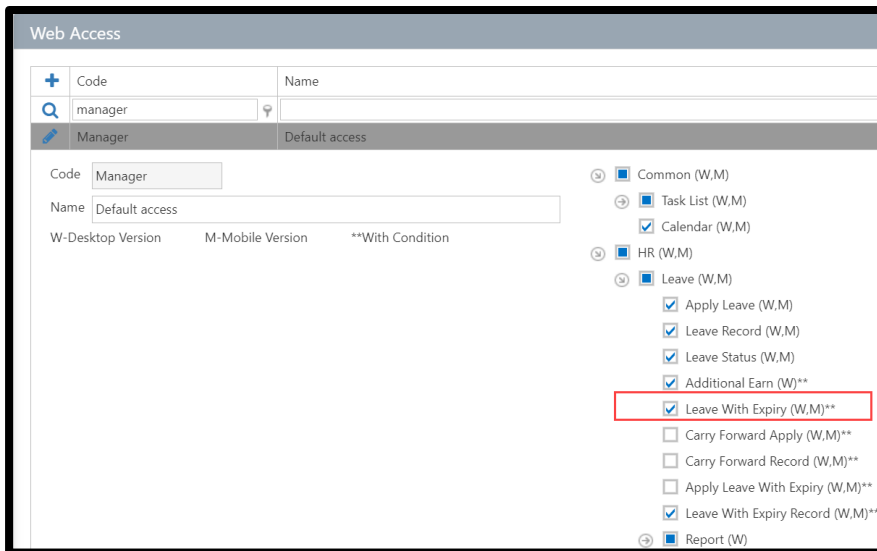
- d) **Leave Amount** – This is to indicate the number of leave days to be credited.
  - e) **Remarks** – This is to specify any information for crediting this leave.
  - f) **Employee Range** – This is to define the group of employees eligible for this leave.
4. Click on the **Process** button.
  5. If Administrator would like to cancel the crediting of leave, click on the **Reverse** button.

### Crediting Leave With Expiry by Manager or HOD without Workflow

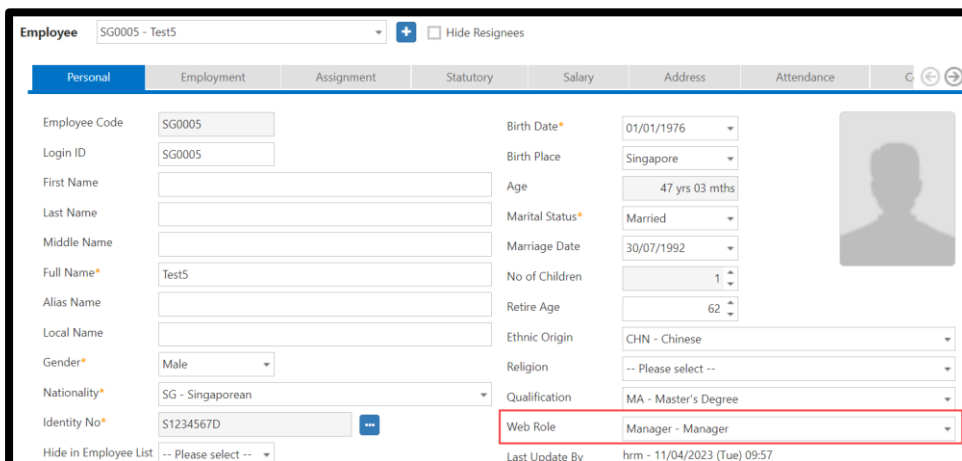
Prerequisite before a Manager or HOD able to credit the leave with expiry without workflow to their employee in ESS view.

1. Ensure that **Web Access** for Manager Role are updated.

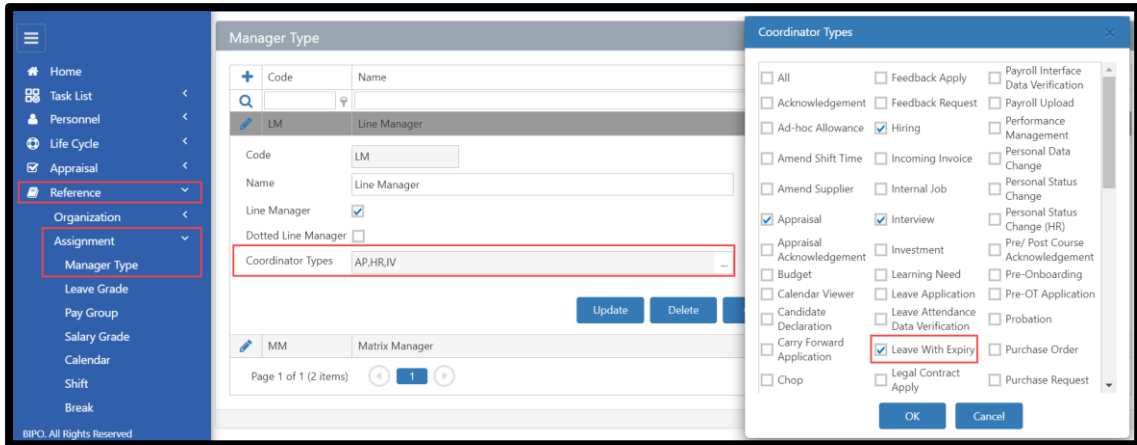
**Leave With Expiry** checkbox is ticked.



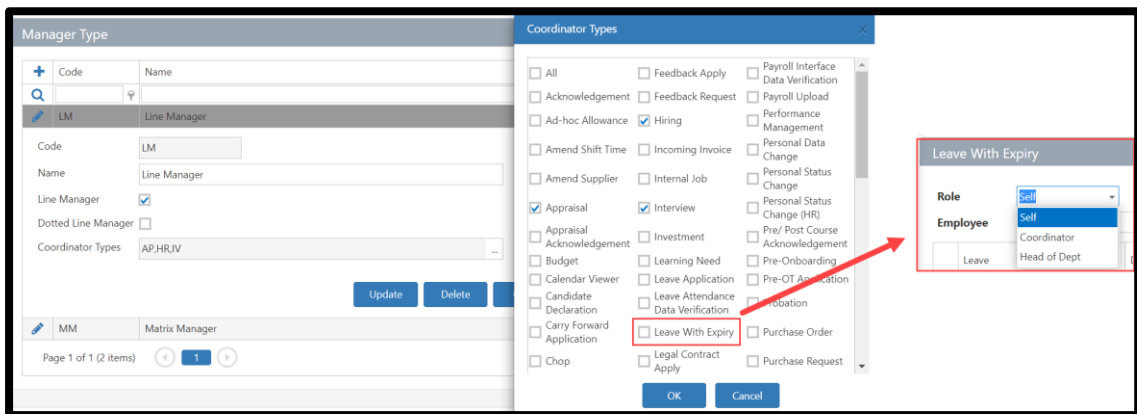
2. Ensure **Web Role** is assigned to the manager accordingly.



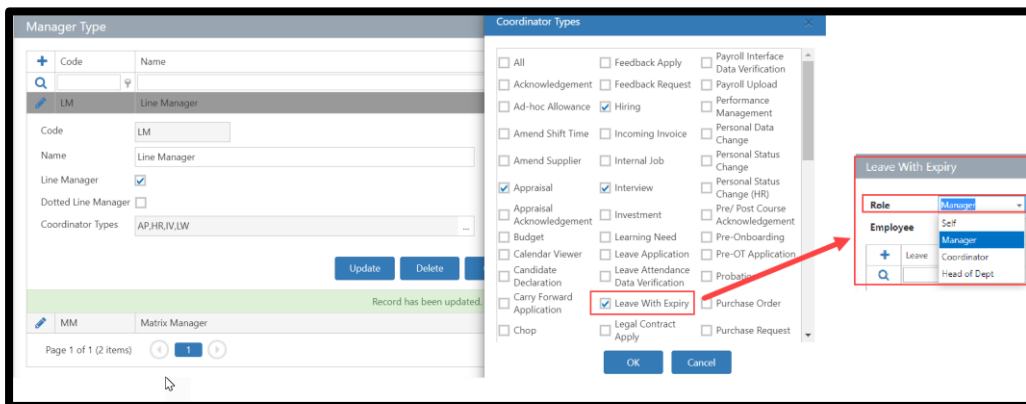
- Ensure that **Leave with Expiry** checkbox for **Coordinator Types** under **Manager Type** screen is ticked.



If this checkbox is unticked, Manager will not appear under the **Role** field in ESS screen for selection.

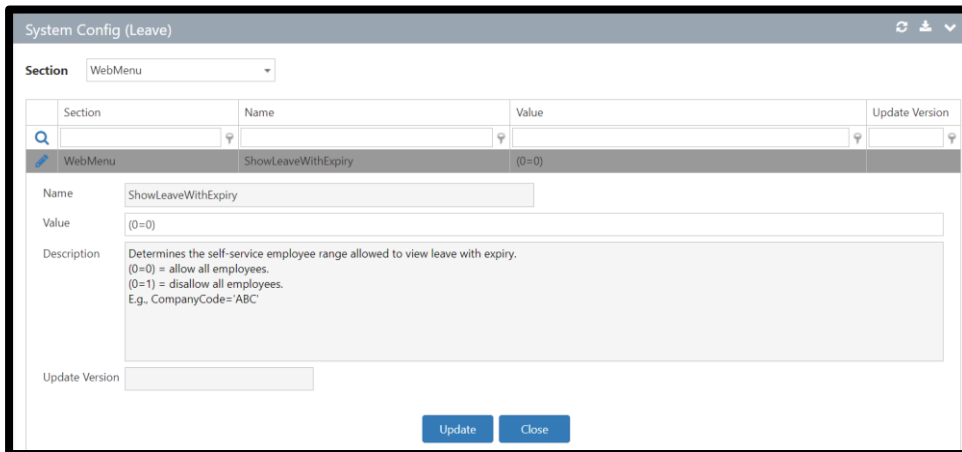


If this checkbox is ticked, Manager will appear under the **Role** field in ESS screen for selection.



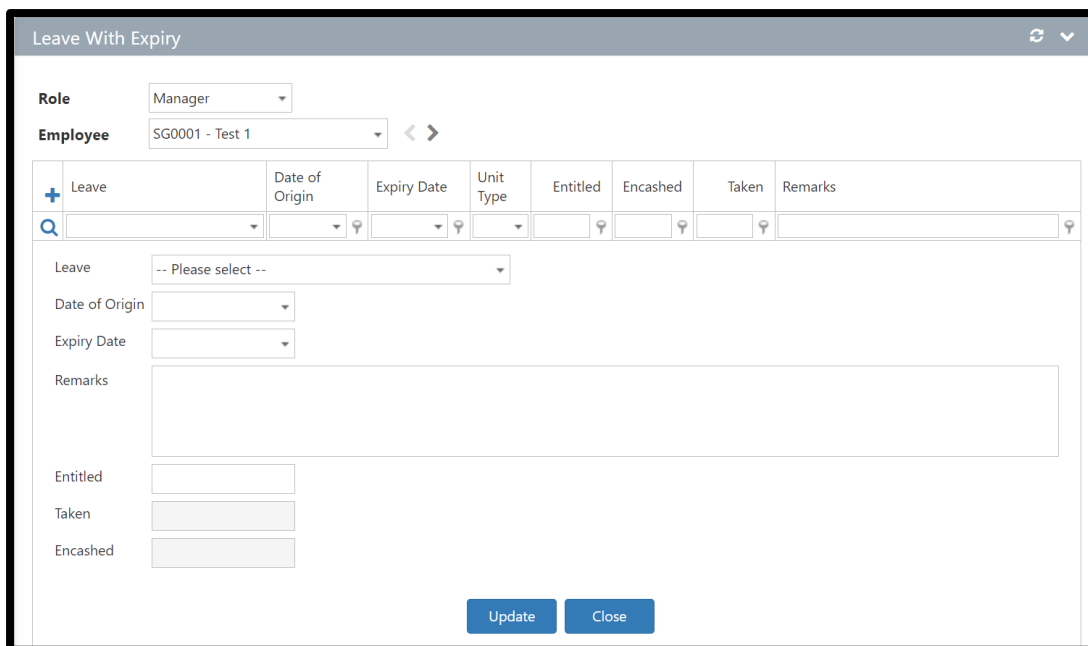
- Ensure parameter for system config as below is setup correctly.

**Access: System > Config > Leave > Section: WebMenu**

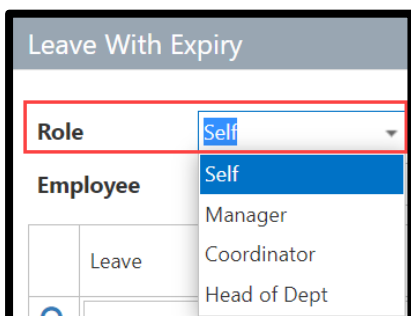


Following are the steps for Manager or HOD to credit the leave with expiry to their employee.

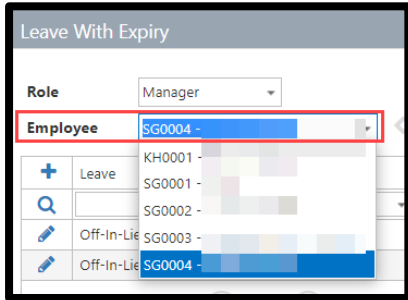
**Access: Employee Self Service > Leave > Leave With Expiry**



1. Navigate to the Leave With Expiry screen.
2. Specify the role from the Role drop-down list, e.g., Manager or Head of Dept.



- Specify the employee to be credited with the leave with expiry.

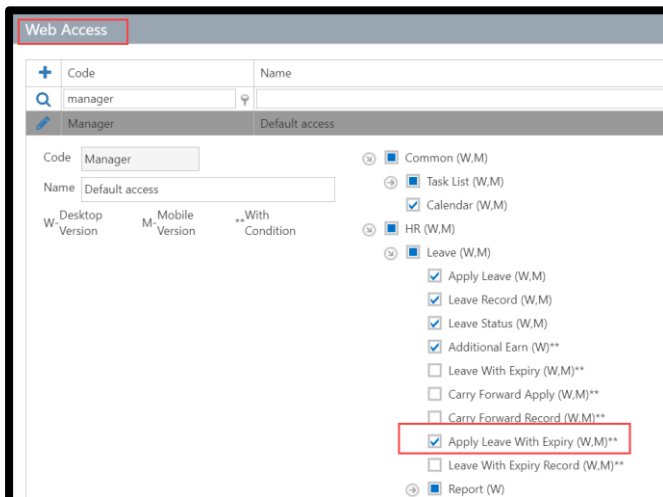


- Click **+** button to credit the leave with expiry. Clicking button allows user to modify the existing leave with expiry record.
- Define the value for fields as below:
  - Leave** - System will show the list of leave code with Leave With Expiry Nature.
  - Date of Origin** - This is to indicate the date origin of the leave. For example, employee is given OIL for the overtime that s/he has performed on their Off Day, the Date Origin can be the date they performed the OT.
  - Expiry Date** - This is to indicate the expiry date of the leave credited.
  - Remark** – This field is used to indicate a remark or note.
  - Entitled** - This is to indicate the number of leave days to be credited.
- Click the **Update** button to save the record.

### Crediting Leave With Expiry by Manager or HOD with Workflow

Prerequisite before a Manager or HOD able to credit the leave with expiry to their employee in ESS view.

- Ensure that **Web Access** for Manager Role are updated.



2. Ensure **Web Role** is assigned to the manager accordingly.

Employee Code: SG0005  
 Login ID: SG0005  
 Birth Date: 01/01/1976  
 Birth Place: Singapore  
 Age: 47 yrs 03 mths  
 Marital Status: Married  
 Marriage Date: 30/07/1992  
 No of Children: 1  
 Retire Age: 62  
 Ethnic Origin: CHN - Chinese  
 Religion: -- Please select --  
 Qualification: MA - Master's Degree  
 Web Role: **Manager - Manager**  
 Last Update By: hrm - 11/04/2023 (Tue) 09:57

3. Ensure that **Leave with Expiry** checkbox for **Coordinator Types** under **Manager Type** screen is ticked.

**Manager Type**

Code	Name
LM	Line Manager
MM	Matrix Manager

Coordinator Types: AP,HR,IV

**Coordinator Types**

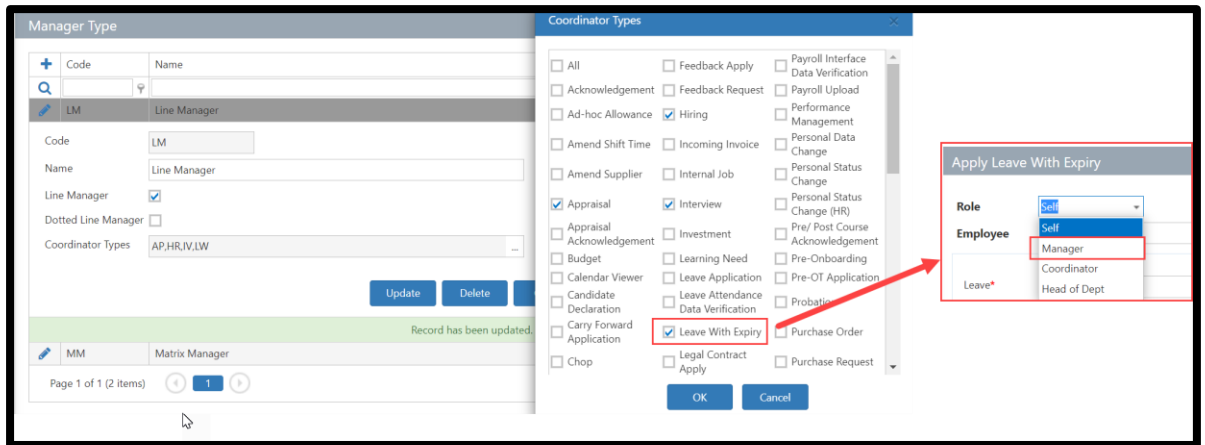
- All
- Acknowledgement
- Ad-hoc Allowance
- Amend Shift Time
- Amend Supplier
- Appraisal
- Appraisal Acknowledgement
- Budget
- Calendar Viewer
- Candidate Declaration
- Carry Forward Application
- Chop
- Feedback Apply
- Feedback Request
- Hiring
- Incoming Invoice
- Internal Job
- Interview
- Investment
- Learning Need
- Leave Application
- Leave Attendance Data Verification
- Leave With Expiry
- Legal Contract Apply
- Payroll Interface Data Verification
- Payroll Upload
- Performance Management
- Personal Data Change
- Personal Status Change
- Personal Status Change (HR)
- Pre/ Post Course Acknowledgement
- Pre-Onboarding
- Pre-OT Application
- Probation
- Purchase Order
- Purchase Request

If this checkbox is unticked, Manager will not appear under the **Role** field in ESS screen for selection.

**Apply Leave With Expiry**

Role: Self  
 Employee: Coordinator  
 Leave\*: Head of Dept

If this checkbox is ticked, Manager will appear under the **Role** field in ESS screen for selection.



5. Enable parameter in system config.

**Access: System > Config > Leave > Section :Leave Request > Name:**

***LWETHroughWorkflow***

- a) Navigate to system config and locate for ***LWETHroughWorkflow*** parameter.
- b) Update the value to “Y” for all countries or only applicable country.

For example, only country = SG needs to have approval when crediting the leave with expiry, specify the parameter as follow: \*=N,SG=Y.

If this config value is “N”, even the web access has enabled ***Apply Leave With Expiry*** screen for Manager or HOD role, they will still not be able to view ***Apply Leave With Expiry*** in ESS view.

6. Ensure workflow for Leave With Expiry is setup.

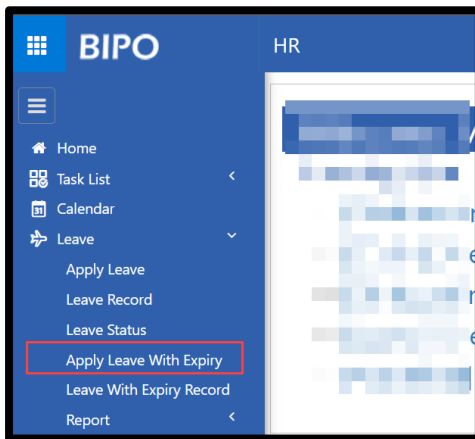
**Access: Leave Module > Setup > Workflow Setup > Workflow Type: Leave With Expiry Apply/Leave With Expiry Cancel**

If workflow is not setup, Manager or HOD will hit the error message when they click **Submit** button in **Apply Leave With Expiry** screen.

Following are the steps for Manager or HOD to credit the leave with expiry to their employee with workflow.

**Access: Employee Self Service > Leave > Apply Leave With Expiry**

1. Navigate to the **Leave With Expiry** Screen.



The screenshot shows the 'Apply Leave With Expiry' form. The Role is set to 'Self' and the Employee is 'SG0005 - Test5'. The Leave field is set to '-- Please select --'. The Date of Origin, Expiry Date, and Entitled fields are empty. The Remarks field is empty. The Approval table shows one entry for 'SG0008 - Test 8'.

Level	Name	Date	Action	Remarks
1	SG0008 - Test 8			

2. Specify the role from the Role drop-down list, e.g., Manager or Head of Dept.

The screenshot shows the 'Apply Leave With Expiry' form with the Role dropdown menu open. The Role is set to 'Self'. The dropdown menu lists 'Self', 'Manager', 'Coordinator', and 'Head of Dept'.

3. Specify the employee to be credited with the leave with expiry.

4. Define the value for fields as below:

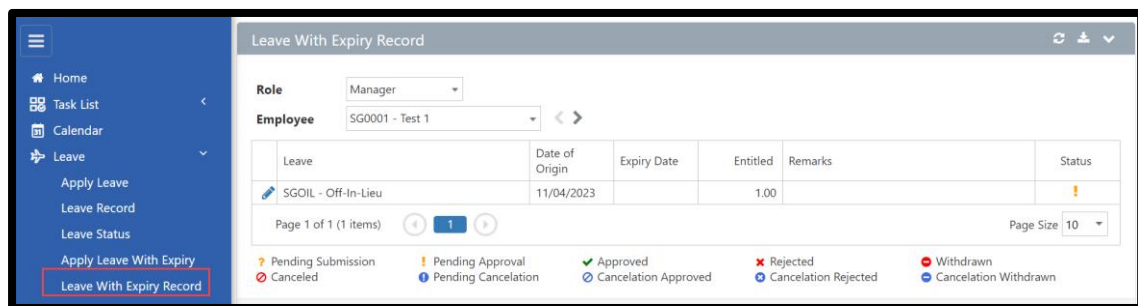
- Leave** - System will show the list of leave code with Leave With Expiry Nature.
- Date of Origin** - This is to indicate the date origin of the leave. For example, employee is given OIL for the overtime that s/he has performed on their Off Day, the Date Origin can be the date they performed the OT.
- Expiry Date** - This is to indicate the expiry date of the leave credited.

- d) **Entitled** - This is to indicate the number of leave days to be credited.
  - e) **Remark** – This field is used to indicate a remark or note.
5. Click on the **Save Draft** button to save the changes and submit at later time.
  6. Click on the **Submit** button to submit the request.

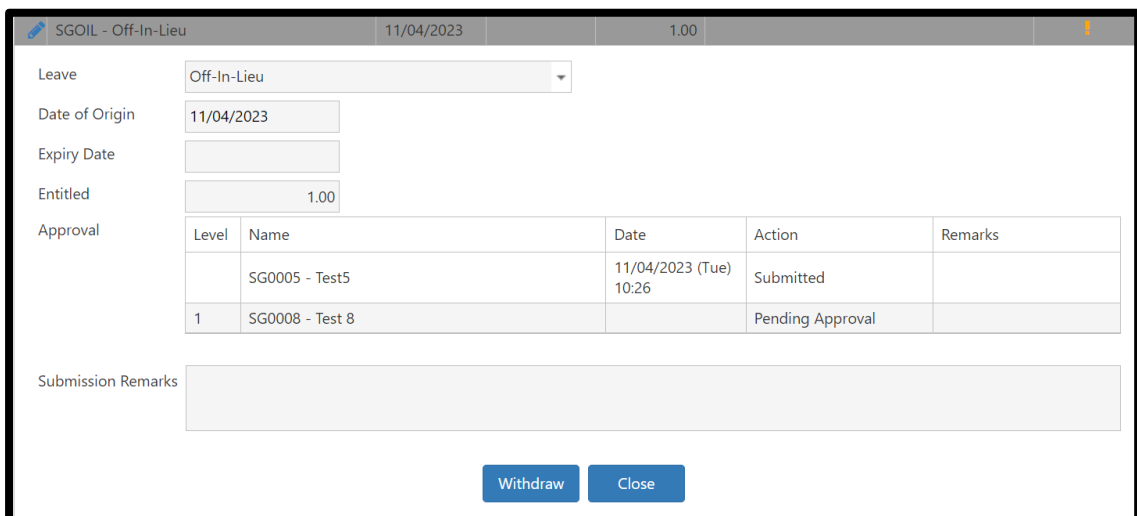
### Viewing or Editing Leave With Expiry by Manager or HOD

Following are the steps for Manager or HOD to view / withdraw / submit the Leave with Expiry that was previously created:

**Access: Employee Self Service > Leave > Leave With Expiry Record**



1. Navigate to the **Leave With Expiry Record** screen.
2. Specify the role from the Role drop-down list, e.g., Manager or Head of Dept.
3. Specify the employee.
4. Click on the corresponds to the record to be edited.
5. Record that is pending approval can be withdrawn by clicking on the **Withdraw** button:



6. Record that is pending submission can be edited or deleted by clicking on the **Edit**

or **Delete** button:

SGOIL - Off-In-Lieu		05/04/2023	1.00	
Leave	Off-In-Lieu			
Date of Origin	05/04/2023			
Expiry Date				
Entitled	1.00			
Approval	Level	Name	Date	Action
		SG0005 - Test5	11/04/2023 (Tue) 16:03	Pending Submission
Remarks				

[Edit](#)
[Delete](#)
[Close](#)

## Leave Encashment for Resignee

**Leave Encashment** can be computed, and annual leave balance days can be interfaced to payroll for action. The following is a simple guide to setup.

1. Create *Allowance Code* with formula for exit encashment.
2. **Access: Payroll Module > Reference > Allowances > Allowance** The first step is to check and create an allowance code with a payroll formula to compute per day salary. This allowance (payment) code will be linked to *Leave Encashment* through *Payroll Interface*.

The screenshot shows the 'Allowances' setup form in the Payroll module. The form is for an allowance named 'Annual Leave Encashment' with code 'SG\_AANL'. The following fields are highlighted with red boxes:

- Type:** Allowance
- Wage Type:** Additional
- Formula:** AL - Annual Leave Encashment

Other visible fields include:

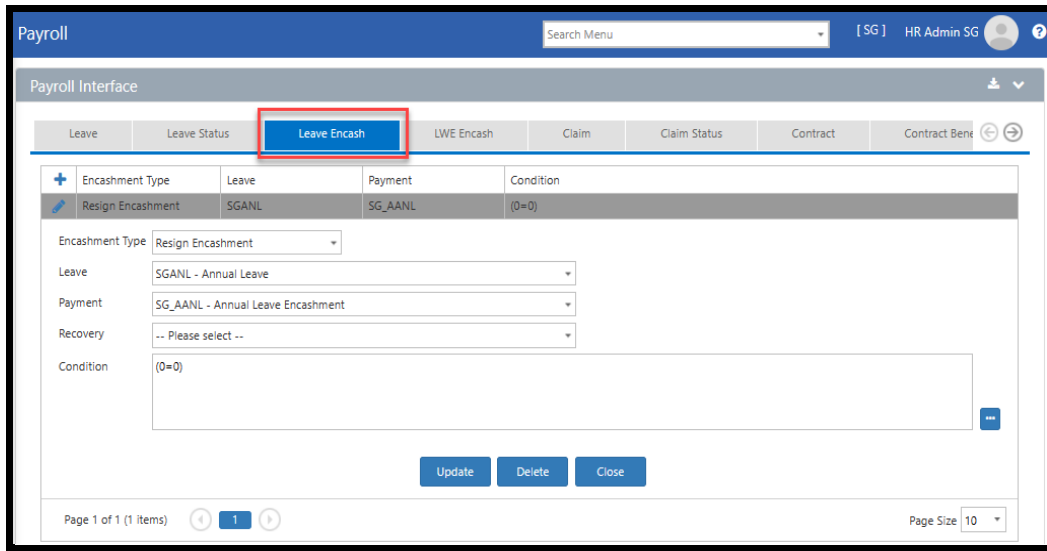
- Country/Region: Singapore
- Code: SG\_AANL
- Name: Annual Leave Encashment
- Category: Others
- Proration: Work Day
- Rate: 1.0000
- Basis Amount Method: Quantity
- Formula: AL - Annual Leave Encashment
- Rate: 1.0000
- Obsolete: No

The form also includes a table of options for various settings like 'Fixed Allowance', 'Retro', 'Arrears', 'Unpaid Codes', etc., and a 'Payslip' section at the bottom.

3. Setup Leave Encashment to Pay Code by using Payroll Interface.

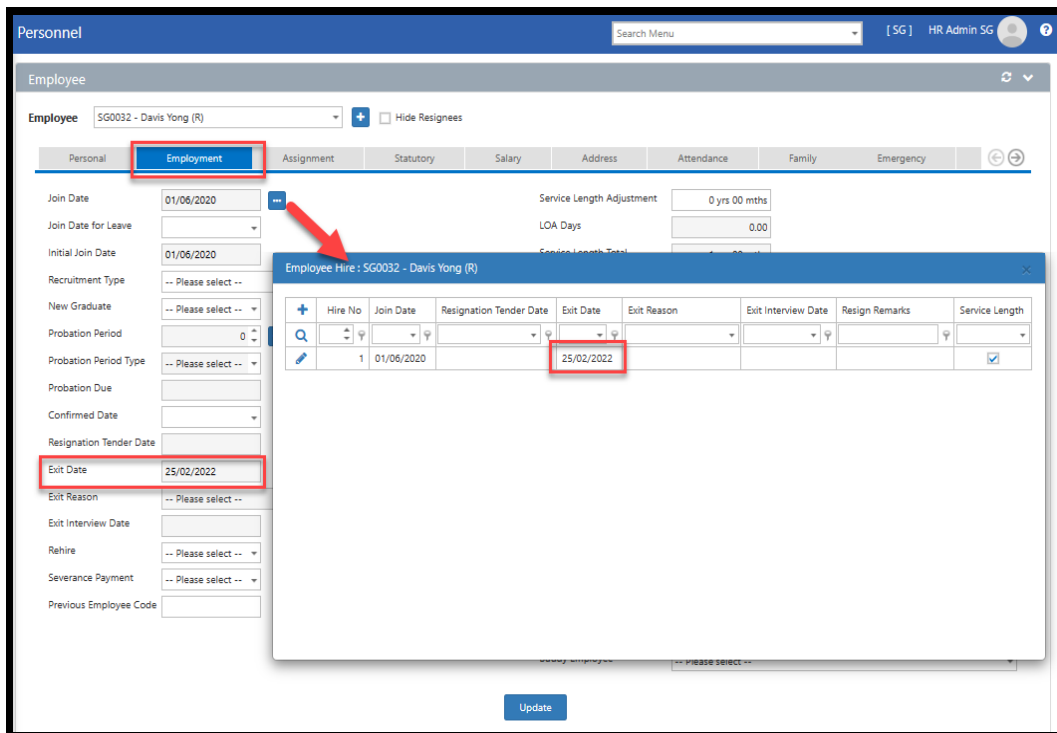
**Access:** Payroll Module > Reference > Payroll Interface > Leave Encash tab

- a. Select **Encashment Type** = Resignee Encashment
- b. Select **Payment** = Allowance (Payment) code created earlier
- c. Define the **Employee Range** and click **Update** button to save the settings



4. Enter Exit Date for Resigned Employee.

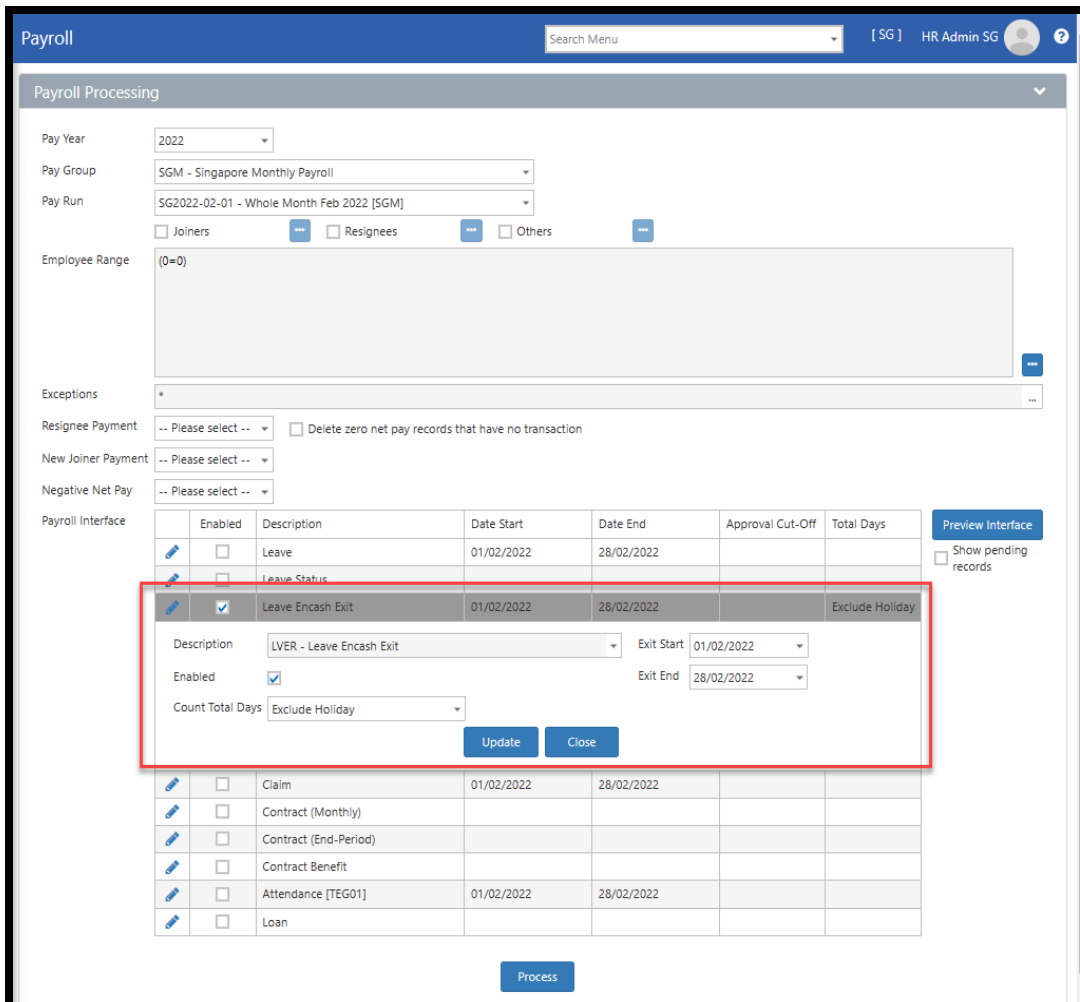
**Access:** Personnel Module > Personnel > Employee > Employment Tab



5. Enable *Leave Encash Exit Interface* in *Payroll Processing*.

**Access:** *Payroll Module > Payroll > Payroll Processing*

Once the *Enabled* checkbox is tick, click *Update* button to save the settings. Next, click *Process* button to perform *Payroll Processing* for the required payrun.



6. Check Payroll Summary record and Leave Status record.

**Access:** *Payroll Module > Payroll > Payroll Summary*

With successful processing, the encashment pay transaction will be created in the employee's payroll summary record.

Payroll Summary

Pay Group: -- All -- Normal | Join Date: 01/06/2020 (Mon) | Department: HR - Human Resou | Exit Date: 25/02/2022 (Fri)

Pay Run: SG2022-02-01 - Whole Month Feb 2022 [SGM] | Salary Gross: 7000.00 | CPF Method: #C - Singaporean | Manager: SG0001 - Scarlett S

Employee: SG0032 - Davis Yong (R) | Total Employee: 21

Basic Pay: 6,650.00 +  Open in Pay Transaction  Locked

#	Type	Code	Name	Quantity	Amount	Source	PTD
N	#SG_CDAC	Fund - CDAC		2.00	2.00	Fund	0
O	#SG_WD	Work Days		19.00	6,650.00	Wage	1
A	SG_AANL	Annual Leave Encashment		1.50	484.62	LeaveRSEncash	1

Value Date: 28/02/2022

Remarks:

CPF Type: #C | Payment:  Bank

Age: 0 yrs 08 mths | Payment Date:

Last Process: HRSR - 30/11/2022 (Wed) 10:52

Net Pay: 5,836.62

Buttons: Process, Update, Delete

7. System will stamp the payroll pay run code on the employee's leave status.

**Access: Leave Module > Leave > Leave Status**

Leave Status

Filter: Company: BIPOSG - BIPO Singapore Pte | Year: 2022 (ACTIVE) | Join Date: 01/06/2020 | Leave G: SG15 - SG 15

Employee: SG0032 - Davis Yong (R) | Join Date: 01/06/2020 | Exit Date: 25/02/2022 | Confirm:

Leave with Entitlement | Leave without Entitlement | Leave With Expiry

Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	
SGANL	Annual Leave		Days	0.00	0.00	0.00	0.00	0.00		-1.50	
Carry Forward		0.00	Next Year Advance		0.00	Next Year Taken		0.00	Next Year Pending Approval		0.00
Carry Forward Expiry		31/03/2022	Period Start		01/01/2022	Period End		31/12/2022	Date Start		01/01/2022
Carry Forward Taken		0.00	Date End		25/02/2022	Date Process		31/03/2022	Service Year		3
Carry Forward Encashed		0.00	Current Entitlement		0.00	Full Year Entitlement		0.00	Full Year Earned		0.00
Earned		0.00	Last Year Balance		16.00	Last Year Forfeited		16.00	Last Year Encashed		0.00
Additional Earned		0.00	Exit Encashed		1.50	Exit Forfeited		0.00	Exit Encash Pay Run		SG2022-02-01
Taken		0.00	Balance		-1.50	Pending Approval		0.00	Pending Encashed		0.00
NPL Penalty		0.00									
Adjustment Taken		0.00									
Adjustment Remarks		<input type="text"/>									
Forfeited		0.00									
Encashed		0.00									
Exit Encashed		1.50									
Exit Forfeited		0.00									
Exit Encash Pay Run		SG2022-02-01									
Balance		-1.50									
Pending Approval		0.00									
Pending Encashed		0.00									

Buttons: Spreadsheet, Update, Delete, Close

## Scheduled Job: Leave Encashment

Leave Encashment can be computed by system automatically. The following is a simple guide to setup.

**Access: Setup > Scheduled Job > Job Type: Leave Encashment**

The screenshot shows a web-based configuration form titled "Scheduled Job". At the top, there is a "Job Type" dropdown menu set to "Leave Encashment". Below this is a table with columns: No., Name, Job Type, Recurring Type, Time Start, Email, Status, Last Run Time, Next Run Time, and Enabled. The table contains one entry with "No." 1 and "Name" "Leave Encashment #1". Below the table is a detailed configuration form for the selected job. The form includes fields for: No. (1), Name (Leave Encashment #1), Email, Date Start, Time Start (00:00), Recurring Type (-- Please select --), Time Out (minutes) (60), Process As At (Fixed Date), Date Process, Encashment Type (-- Please select --), Leave Codes (\*), and Employee Range ((0=1)). On the right side of the form, there are fields for Status, Next Run Time, Last Run Time, Enabled (checkbox), Reset (checkbox), Last Update By, and Create By. At the bottom of the form are three buttons: "Save and Copy", "Update", and "Close".

1. **No.** – Sequence number.
2. **Name** – Name of the Job Type
3. **Email** – A notification will be sent to this email address when there is issue in trigger the schedule job.
4. **Date Start** – Start date of processing leave encashment.
5. **Time Start** – Start time of processing leave encashment.
6. **Recurring Type** – Select the Job Type frequency from:
  - a. One-Time
  - b. Daily
  - c. Monthly
  - d. Interval
7. **Time Out (minutes)** – If there is an error during processing, system will time out based on the minutes specified.
8. **Process As At** – Select the Job Type date process:

- a. Fixed Date – System will prompt a date field for user to define specific date.
  - b. End of Month
  - c. End of Year
  - d. System Date
9. **Encashment Type** – If Encash is selected, system will work same as Encash under Leave Processing page. If C/F Encash is selected, system will work same as Encash Carry Forward under Leave Processing page.
10. **Leave Code** – Select the related leave type(s) for this schedule job.
11. **Employee Range** – Specify to whom Leave Encashment is applicable to.
12. **Status** – The Job Type would be tagged as:
- a. Completed – successful processing of job type.
  - b. Running – system currently running the job type.
  - c. Failed – failed processing of job type.
13. **Next Run Time** – The next scheduled time for processing leave encashment.
14. **Last Run Time** – The last run time when the leave encashment was processed.
15. **Enabled** – Tick to enable the job type **Leave Encashment**. If untick, system will not process the job type.
16. **Reset** – For any changes in the scheduled processing (from One-Time to Monthly), **Reset** must be ticked. If user did not tick **Reset** and only click on **Update** button, the **Last** and **Next Run Time** will not change.

## Scheduled Job: Leave Clearance Notification

**Leave Clearance Notification** is used to send email notification to **Employee, Line Manager** and/or **HR Manager** to notify the recipient(s) on clearing their leave balance.

**Access: Setup > Scheduled Job > Job Type: Leave Clearance Notification**

1. **No** – Sequence number.
2. **Name** – Name of the Job Type.
3. **Email** – A notification will be sent to this email address when there is issue in sending the email.

**Note:**

Successful processing of **Leave Clearance Notification** will not send notification to this email address.

4. **Date Start** – Start date of sending **Leave Clearance Notification**.
5. **Time Start** – Start Time of sending **Leave Clearance Notification**.
6. **Recurring Type** – Select the Job Type frequency from:
  - a. One-Time
  - b. Daily
  - c. Monthly
  - d. Interval

For example:

If **Recurring Type** is set as Daily and the **Time Start** is 9:00am, the **Leave Clearance Notification** email will be sent to notify the recipient(s) at 9:00am daily.

7. **Time Out (minutes)** – If there is an error when sending the notification, system will time out based on the minutes specified.
8. **Leave Codes** – Select the related leave type(s) for the notification.
9. **Balance Type** – To select which type leave balance to notify for clearance. Select from:
  - a. Balance (B)
  - b. C/F Balance (C)
10. **Send To** – Indicate to whom the notification will be sent to:
  - a. All
  - b. Employee
  - c. Line Manager
  - d. HR Manager

**Note:**

User can configure the sender of the email under system config.

**Access:** System > Config > Web > Email

Section	Name	Value
Email	SendMethod	1
Email	AutoPurgeDays	180
Email	EmailFrom	hrms@biposervice.com

Name	EmailFrom
Value	hrms@biposervice.com
Description	The Email From, when used to send the email

The screenshot shows a configuration window with the following fields and values:

- Period End Days:** 30
- Criteria:** Minimum Balance (dropdown), 0.00 (input)
- Send To Managing Admin:**
- Employee Range:** ((TblEmployee.CompanyCode IN ('BIPOID','BIPOMY','BIPOPH')))

Buttons at the bottom: Save and Copy, Update, Close.

11. **Period End Days** – The number of days before the period end (i.e. leave balance expiry) where system will start sending the notification.

For example:

- Period End Days specified as 30 days.
- Period End for the Annual Leave is 31<sup>st</sup> Dec.

System will start sending the **Leave Clearance Notification** from 1<sup>st</sup> Dec onwards (30 days prior to Period End of 31<sup>st</sup> Dec) for those records that fulfilled the criteria set.

12. **Criteria** – Specify the criteria for the system to send the notification.

- a. **Minimum Balance** – This is a fixed number of balance days as the minimum criteria for notification.

For example:

If Minimum Balance is set as 5 days, hence employees with leave balance of 5 and above will be receiving the notification.

- b. **Balance Percentage** – This is to allow user to set balance leave in percentage of total as the criteria.

For example:

Balance Percentage is 50%, hence notification will be sent to employees with balance leave of 50% or more.

13. **Send to Managing Admin** – If the Managing Admin is not Employee, Line Manager or HR Manager, if ticked, then they will also receive the **Leave Clearance Notification**.

14. **Employee Range** – Specify to whom **Leave Clearance Notification** is applicable to.

15. **Status** – The Job Type would be tagged as:

- a. **Completed** – successful processing of job type.
- b. **Running** – system currently running the job type.
- c. **Failed** – Failed processing of job type.

Status	<input type="text"/>
Next Run Time	<input type="text"/>
Last Run Time	<input type="text"/>
Enabled	<input type="checkbox"/>
<b>Reset</b>	<input type="checkbox"/>
Last Update By	
Create By	

- 16. **Next Run Time** – The next scheduled time for sending the notification.
- 17. **Last Run Time** – The last run time when the notification was triggered.
- 18. **Enabled** – Tick to enable the job type **Leave Clearance Notification**. If untick, system will not process the job type.
- 19. **Reset** – For any changes in the scheduled processing (from One-Time to Monthly), **Reset** must be ticked. If user did not tick **Reset** and only click on **Update** button, the **Last** and **Next Run Time** will not change.

## Scheduled Job: Leave Forfeiture

Scheduled Job 🔄 📄 ⌵

**Job Type** Leave Forfeiture

+	No.	Name	Job Type	Recurring Type	Time Start	Email	Status	Last Run Time	Next Run Time	Enabled
🔍	👤	<input type="text"/>	👇	👇	👤	<input type="text"/>	👇	<input type="text"/>	👤	👇

No. <input style="width: 50px;" type="text" value="1"/>	Status <input style="width: 100px;" type="text"/>
Name <input style="width: 90%; border: 1px solid gray;" type="text" value="Leave Forfeiture #1"/>	Next Run Time <input style="width: 150px;" type="text"/>
Email <input style="width: 90%; border: 1px solid gray;" type="text"/>	Last Run Time <input style="width: 150px;" type="text"/>
Date Start <input style="width: 100px;" type="text"/>	Enabled <input type="checkbox"/>
Time Start <input style="width: 100px;" type="text" value="00:00"/>	<b>Reset</b> <input type="checkbox"/>
Recurring Type <input style="width: 100px;" type="text" value="One-Time"/>	Last Update By
Time Out (minutes) <input style="width: 100px;" type="text" value="60"/>	Create By
Process As At <input style="width: 100px;" type="text" value="-- Please select --"/>	
Leave Codes <input style="width: 90%; border: 1px solid gray;" type="text" value="SGANL"/>	
Employee Range <input style="width: 90%; border: 1px solid gray;" type="text" value="(0=0)"/>	

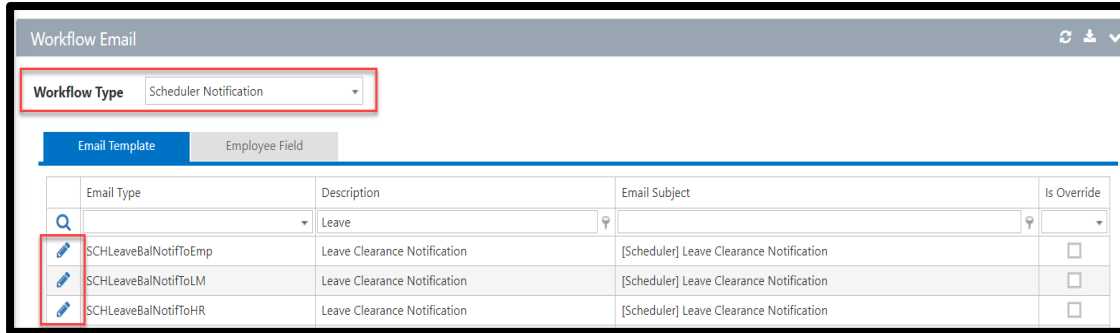
Save and Copy
Update
Close

1. **No** – Sequence number.
2. **Name** – Name of the job type.
3. **Email** – A notification will be sent to this email address when there is issue in trigger the schedule job.
4. **Date Start** – Start date of processing **Leave Forfeiture**.
5. **Time Start** – Start time of processing **Leave Forfeiture**.
20. **Recurring Type** – Select the Job Type frequency from:
  - e. One-Time
  - f. Daily
  - g. Monthly
  - h. Interval
6. **Time Out (minutes)** – If there is an error during processing, system will time out based on the minutes specified.
17. **Process As At** – Select the Job Type date process:
  - e. Fixed Date – System will prompt a date field for user to define specific date.
  - f. End of Month
  - g. End of Year
  - h. System Date
7. **Leave Codes** – Select the related leave type(s) for the notification.
8. **Employee Range** – Specify to whom **Leave Forfeiture** is applicable to.
21. **Status** – The Job Type would be tagged as:
  - d. Completed – successful processing of job type.
  - e. Running – system currently running the job type.
  - f. Failed – Failed processing of job type.
9. **Next Run Time** – The next scheduled time for sending the notification.
10. **Last Run Time** – The last run time when the notification was triggered.
22. **Enabled** – Tick to enable the job type **Leave Forfeiture**. If untick, system will not process the job type.
11. **Reset** – For any changes in the scheduled processing (from One-Time to Monthly), **Reset** must be ticked. If user did not tick **Reset** and only click on **Update** button, the **Last** and **Next Run Time** will not change.

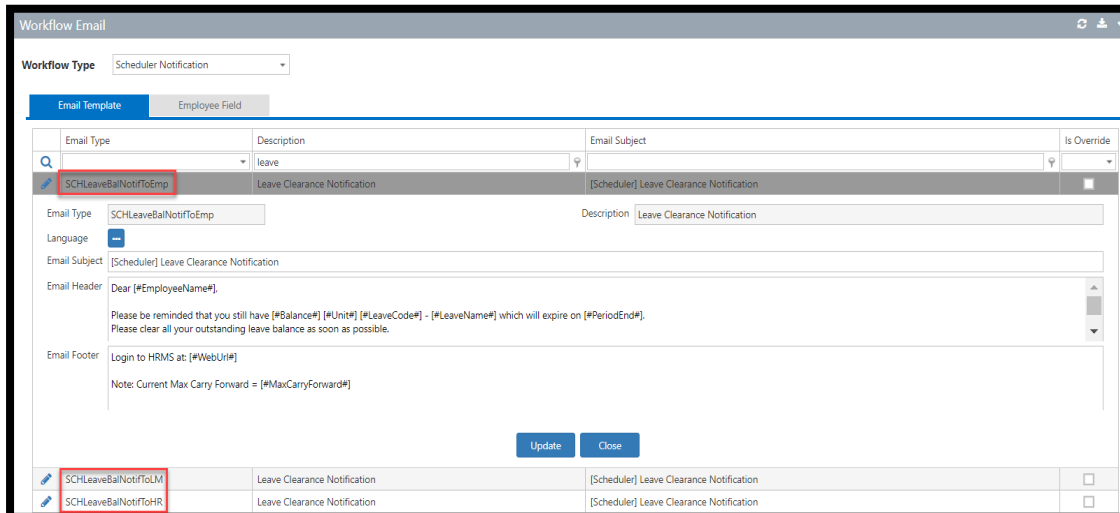
## Workflow Email

The email template that are being sent to Employee, Line Manager and HR Manager can be configured in **Workflow Email**.

**Access: Setup > Workflow > Workflow Email**



Refer to screenshot below for sample of the setup screen:



## Leave Year End Closing

### Advance Leave (Next Period Setting)

This setting is required for company that allows their employees to apply for annual leave in the next year/period (utilizing next year/period’s leave entitlement) prior to leave closing.

**Access: Leave Module > Reference > Leave > Advance Leave Tab**

#### 1. Next Advance Entitlement

Field Value	Remarks
<i>Full Year Entitlement</i>	If company allows employee to apply up to their <i>full year’s entitlement for the next year/period</i> (max applicable will based on current year’s entitlement if system has not process next year/period’s full entitlement but will be deducted from next year/period’s entitlement).  E.g., Employee is applying 1 day of annual leave for 03 Jan 2023 in year 2022. System will deduct that one day leave from 2023’s entitlement instead of from 2022’s entitlement.
<i>{0} months</i>	Similar logic as above but only allows employee to apply up to a <i>certain no. of months’ worth of next year/period’s entitlement</i> (max applicable will based on current year’s entitlement but will be deducted from next year/period’s entitlement).

#### 2. Next Advance Months

User needs to specify the *no. of months* under this field when *{0} months* is selected. Otherwise, leave the value as 0.

3. **Next Advance Additional**

Enter the *number of days* in this field if the company is allowing employee to apply additional number of days in addition to the above setting (**Next Advance Entitlement** and **Next Advance Months**).

4. **Allow next year advance leave to be taken this year**

Allow next year advance leave to be taken this year

Next Advance This Year

This field is to allow employee to apply leave for current year/period by utilising the entitlement from next year/period.

Check box Action	Remarks
<u>WITHOUT</u> tick	Does not allow employee to apply current leave by utilising next year/period's entitlement.
<u>WITH</u> tick	<p>Allow employee to apply current leave by utilising next year/period's entitlement. Max amount allowed to utilize is depends on the <i>Amount/Percentage</i> set in <b>Next Advance This Year</b> field.</p> <p>E.g., Employee is applying 2 days of annual leave for 03 Dec 2022 but 2022 entitlement has been fully utilised. Hence system will deduct that two days leave from 2023's entitlement.</p>

5. **Update** button - Click on this to save the record.

The following is an example for illustration.

- Current Year = 2022
  - Employee 001 current year's leave entitlement = 12 days.

Parameter setting	Result
<b>Next Advance Entitlement = Full Year Entitlement</b>	Employee 001 would be able to apply for 2023 leave (leave dated in 2023) up to maximum of 12 days in 2022, utilising 2023 entitlement (max applicable based on 2022 entitlement)
<b>Next Advance Entitlement = {0} months and Next Advance Months = 3</b>	Employee 001 would only be able to apply for 2023 leave (leave dated in 2023) up to maximum of 3 days in 2022, utilising 2023 entitlement.
<b>Next Advance Entitlement = Full Year Entitlement and Next Advance Additional = 3</b>	Employee 001 would be able to apply for 2023 leave up to maximum of 12+3 = 15 days in 2022, utilising 2023 entitlement.

**NOTE:** This setting only applies to Annual Leave Type.

## Leave Processing for Advance Leave

Upon configuring the *Advance Leave* setting, a **Leave Processing** will need to be done for the *Advance Leave* setting to take effect.

Perform **Leave Processing** in the following 2 methods:

### *Manual Leave Processing*

Following are the steps to perform leave processing for advance leave:

**Access:** *Leave > Leave Processing*


1. Navigate to **Leave Processing** menu.
2. Specify the **Date Process**.
3. Specify the **Leave Codes**.
4. Tick on the “**Compute next year advance (based on entitlement this year)**”.
5. Define **Employee Range** (if applicable).
6. Click on the **Process** button.

*Leave Processing Scheduled Job*

Following are the steps to update the Leave Processing Scheduled Job.

**Access: Setup > Scheduled Job > Job Type: Leave Processing**

The screenshot displays the 'Leave Processing' job configuration page. At the top, the 'Job Type' is set to 'Leave Processing'. Below this is a table with columns: No., Name, Job Type, Recurring Type, Time Start, Email, Status, Last Run Time, Next Run Time, and Enabled. The first row shows '1', 'Leave Processing', 'Leave Processing', 'Daily', '12:00', 'training@biposervice.com', 'Completed', '15/01/2020 (Wed) 12:00:01', '16/01/2020 (Thu) 12:00:00', and a checked 'Enabled' box. A pencil icon is in the first column of this row. Below the table, the configuration details for 'Leave Processing' are shown. Fields include: No. (1), Name (Leave Processing), Email (training@biposervice.com), Date Start (09/07/2017), Time Start (12:00), Recurring Type (Daily), Time Out (5), Days of Week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday), Process As At (System Date), Leave Codes (empty), and Employee Range (0=0). The checkbox 'Compute next year advance (based on this year's entitlement)' is checked and highlighted with a red box. The 'Update' button is also highlighted with a red box.

1. Click on the  **pencil icon** that corresponds to the record to be updated. Ensure that the checkbox for **Compute next year advance (based on this year's entitlement)** is ticked.
2. Click on the **Update** button to save the setting.
3. System will perform the *leave processing* at the *scheduled time*.

## Leave Closing

**Leave Closing** is a process to close the current active leave period and to initiate the next year's period. During the leave closing process, system may carry forward employee's leave balance from the current active period to the next period depending on the company's leave policy ([refer to Special Tab - Year End Tab \(Annual Leave\)](#))

### Preparation for Leave Closing

Following are the items to confirm / perform prior *Leave Closing*:

#### 1. Confirm the **Year End Policy Setting**

There are various *Carry Forward Policies* available in the system. Ensure that the *Carry Forward Policy* has been set according to the company's policy.

**Access: Leave Module > Reference > Leave > Annual Leave Code > Year End Tab**

#### 2. Perform **Leave Processing**.

**Access: Leave Module > Leave > Leave Processing**

- a. Specify **Date Process** as at the end of the current period (e.g., 31<sup>st</sup> Dec).
- b. Specify the **Leave Codes** to be closed.
- c. Tick **Compute next year advance (based on entitlement this year)** (if applicable).
- d. Specify the **Employee Range** (if applicable).
- e. Click on the **Process** button.

**Note:**

- Ensure that all leave records for the current period have been entered and approved in the system.
- Repeat **Leave Processing** if there are newly added/approved records or changes to the **Entitlement / Year End Policy** setup.

3. Generate **Leave Record Report** and/or **Annual Leave Status Report**

This is to check that the annual leave balances for all employees are correct prior performing the leave closing.

**Access: Leave Module > Report > Leave Record**

BIPO Service										
Leave Record										
04/11/2022 (Fri) 16:18		Period: 01/01/2022 to 31/12/2022, Existing Records As At 31/12/2022.							HRSG - Page 1 of 1	
Range: (Employee Code between 'SG0001' and 'SG0001')										
Employee Code	Employee Name	Date Start	Date End	Leave Name	Days	Hours	Approval Status	Approval Target	Missing Attachment	
<b>Leave Code</b> SGANL / Annual Leave										
SG0001	Scarlett Sim Xue Er	14/04/2022	14/04/2022	Annual Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	08/08/2022	08/08/2022	Annual Leave	0.50	0.00	Approved			
SG0001	Scarlett Sim Xue Er	27/12/2022	27/12/2022	Annual Leave	1.00	0.00	Pending Approval	Mitch Han		
SG0001	Scarlett Sim Xue Er	10/05/2022	10/05/2022	Annual Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	09/06/2022	09/06/2022	Annual Leave	1.00	0.00	Withdrawn			
SG0001	Scarlett Sim Xue Er	26/01/2022	26/01/2022	Annual Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	13/07/2022	14/07/2022	Annual Leave	2.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	12/04/2022	12/04/2022	Annual Leave	1.00	0.00	Canceled			
<b>Record Count</b>	8				8.50	0.00				
<b>Leave Code</b> SGMED / Medical Leave										
SG0001	Scarlett Sim Xue Er	10/03/2022	10/03/2022	Medical Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	05/09/2022	05/09/2022	Medical Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	31/10/2022	31/10/2022	Medical Leave	1.00	0.00	Pending Approval	Mitch Han		
<b>Record Count</b>	3				3.00	0.00				
<b>Leave Code</b> SGUNP / Unpaid Leave										
SG0001	Scarlett Sim Xue Er	18/02/2022	18/02/2022	Unpaid Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	08/04/2022	08/04/2022	Unpaid Leave	1.00	0.00	Approved			
SG0001	Scarlett Sim Xue Er	18/07/2022	18/07/2022	Unpaid Leave	0.50	0.00	Approved			
SG0001	Scarlett Sim Xue Er	19/08/2022	19/08/2022	Unpaid Leave	1.00	0.00	Approved			
<b>Record Count</b>	4				3.50	0.00				
<b>Record Count</b>	15				15.00	0.00				

**Access: Leave Module > Report > Annual Leave Status**

1. Specify the **Leave Period**, **Leave Codes**, **Print For**, and **Available Balance Based On** fields accordingly.
2. Tick on the necessary options.
3. Specify the **Employee Range** (if applicable).
4. Click on the **Preview**, **Export**, or **Spreadsheet** button to generate the report in the respective format.

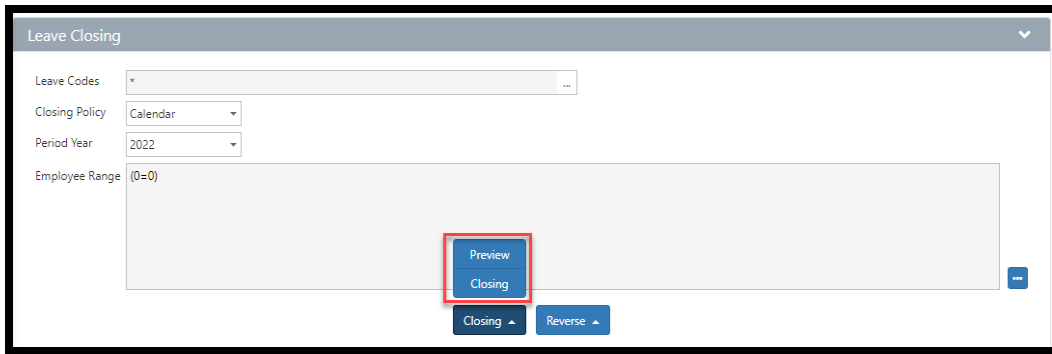
BIPO Service																
Annual Leave Status																
04/11/2022 (Fri) 16:35		Available Balance Based On: 31/12/2022. Period: ACTIVE. Existing Records As At 31/12/2022.										HRSG - Page 1 of 1				
Range: ((Employee Code between 'SG0001' and 'SG0005'))																
Employee Code	Employee Name	Join Date	Exit Date	Leave Grade	Leave Name	Full Year Entitlement	C/F	C/F Expiry	C/F Taken	Earned	Add Earned	Taken	Taken Adjust	Forfeited	Encash	Balance
SG0001	Scarlett Sim Xue Er	01/07/2016		SG 14 DAYS	Annual Leave	21.00	7.00	31/03/2022	1.00	21.00	1.00	4.50	0.00	0.00	0.00	22.50
SG0002	Brendan Jones	20/07/2017		SG 14 DAYS	Annual Leave	14.00	7.00	31/03/2022	0.00	14.00	2.00	0.50	0.00	0.00	0.00	22.50
SG0003	Rebecca Seow Yi Fang	22/08/2016		SG 15 DAYS	Annual Leave	18.00	0.00	31/03/2022	0.00	18.00	0.00	0.00	0.00	0.00	0.00	18.00
SG0004	Karen Johnson	01/09/2022		SG 14 DAYS	Annual Leave	21.00	0.00		0.00	7.00	0.00	0.00	0.00	0.00	0.00	7.00
SG0005	Mitch Han	15/01/2015		SG 14 DAYS	Annual Leave	14.00	10.00	31/07/2022	3.00	14.00	0.00	2.00	0.00	0.00	0.00	15.00
<b>Record Count</b>	<b>5</b>					<b>88.00</b>	<b>24.00</b>		<b>4.00</b>	<b>74.00</b>	<b>3.00</b>	<b>7.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>85.00</b>

Perform Year End Leave Closing

**Prerequisite:** User to ensure that for all leave submitted, there should not be any **Pending (Approval) Leave Records**.

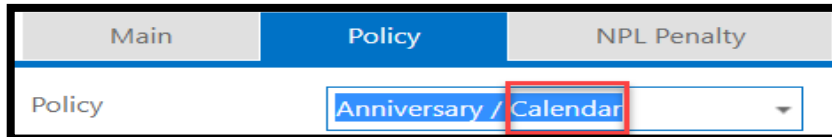
1. Perform **Leave Closing** for the period.

**Access: Leave Module > Leave > Leave Closing**



- a. Specify the **Leave Codes** to be closed.
- b. Select **Closing Policy**.

This varies according to the Annual Leave Policy set under **Reference > Leave > Policy Tab**.

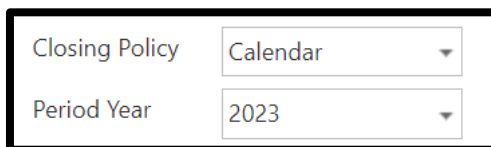


Policy value defined	Closing Policy value to select
Anniversary / <b>Calendar</b>	Calendar
Calendar / <b>Calendar</b>	Calendar
Anniversary / <b>Anniversary</b>	Anniversary

**Note:**

In general, for *Anniversary / Anniversary* policy, the closing would be done through *Leave Closing Scheduled Job* as the leave closing is normally done on daily basis. However, the system allow user to perform leave closing manually in this screen.

- c. If **Closing Policy** value equal to **Calendar**, **Period Year** field will be enabled for selection. Specify the **Period Year** to close.



- d. If **Closing Policy** value equal to **Anniversary**, **Closing Days** field will be enabled for selection.

Closing Policy	Anniversary
Closing Days	0

Closing Days = x days

System will perform Leave Closing for Leave Status with Period End before today's date – x days

**Example:**



Today's Date: 10/4/2023

If there are 3 employees with Period End as below:

Employee	Period End
Employee A	8/4/2023
Employee B	9/4/2023
Employee C	10/4/2023

User select Closing Dates = 0 days, system will close for employee A and B because their period end date before today's date. Employee C will not be closed because period end date is equal today date.

User select Closing Dates = 1 day, system will close for employee A only as system will select those Period End before Today's Date minus 1 day.

- e. Specify the **Employee Range**. Value (0=0) means all employees.
- f. Click the  button to select the **Preview** button to view the list of employees and leave codes that will be included based on your selection.
- g. Click the  button to select the **Closing** button to close the leave records for the year.

**Perform Leave Processing for the New Period**

Ensure that leave for the previous period has been closed prior to initialize and start the new period.

*Leave Processing* needs to be done for system to compute employee's entitlement in the new period.

Following are the steps to perform leave processing for the new period.

**Access: Leave Module > Leave > Leave Processing**

1. Define **Date Process**, it could be end of the month (i.e., 31<sup>st</sup> Jan of the new period) or end of the period (i.e., 31<sup>st</sup> Dec of the new period), depending on the company's policy.
2. Specify the applicable **Leave Codes** and **Employee Range** (if applicable).
3. Click on the **Process** button.

#### Generate Annual Leave Status Report and/or Other Leave Status Report

This step is to check that the carry forward days (if applicable) are correct and to ensure that the *Leave Closing* has been performed correctly.

**Access: Leave Module > Report > Annual Leave Status or Other Leave Status**

1. Specify the **Leave Period**, **Leave Codes**, **Print For**, and **Available Balance Based On** fields accordingly.
2. Tick on the necessary options.

3. Specify the **Employee Range** (if applicable).
4. Click on the **Preview**, **Export**, or **Spreadsheet** button to generate the report in the respective format.

### Leave Status Adjustment (Optional)

This section covers the steps to adjust employee's leave (if required).

**Access: Leave Module > Leave > Leave Status**

The screenshot displays the 'Leave Status' adjustment interface. At the top, there are filter options for Company (BIPOSG - BIPO Singapore Pte), Employee (SG0001 - Scarlett Sim Xue Er), and Year (2023 (ACTIVE)). Below the filters, there are tabs for 'Leave with Entitlement', 'Leave without Entitlement', and 'Leave With Expiry'. The main area shows a table of leave types, with 'Annual Leave' selected. The 'Adjustment Taken' field is highlighted with a red box. The interface also includes various input fields for dates and amounts, and buttons for 'Spreadsheet', 'Update', 'Delete', and 'Close'.

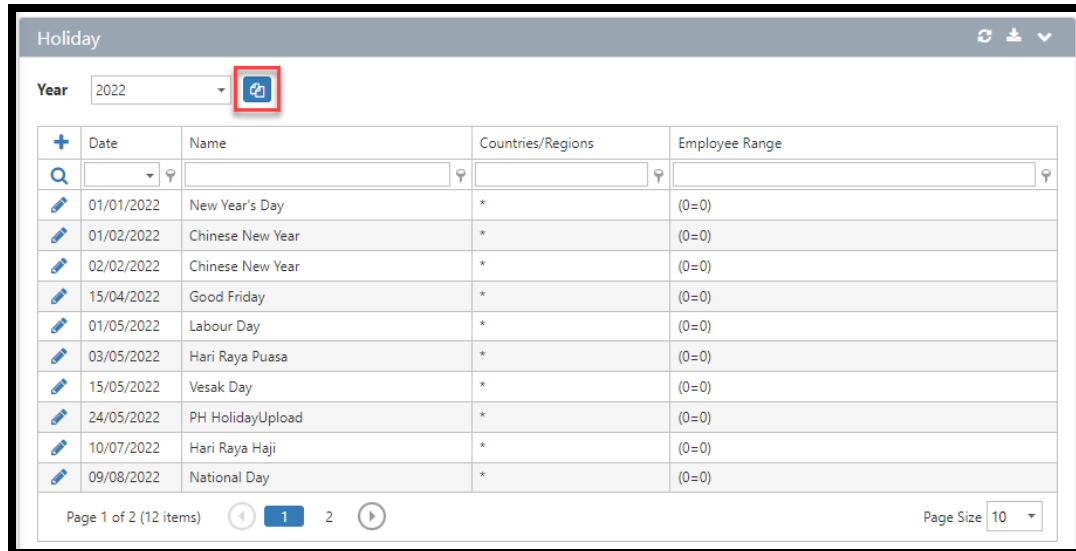
Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	Pending Approval
AAANL	Annual Leave		Days	7.00	0.00	1.00	0.00	0.00		8.00	0.00
	Carry Forward			7.00							
	Carry Forward Expiry										
	Carry Forward Taken										
	Carry Forward Encashed										
	Earned					1.00					
	Additional Earned					0.00					
	Taken					0.00					
	Adjustment Taken							0.00			
	Adjustment Remarks										
	Forfeited							0.00			
	Encashed							0.00			
	Exit Encashed							0.00			
	Exit Forfeited							0.00			
	Balance							8.00			
	Pending Approval							0.00			
	Pending Encashed							0.00			


1. Select the employee from the **Employee** drop-down.
2. Ensure the **Year** refers to the new period.
3. Select the relevant **Annual Leave Code**.
4. Adjust the applicable fields (**Carry Forward**, **Carry Forward Expiry**, etc.) accordingly.

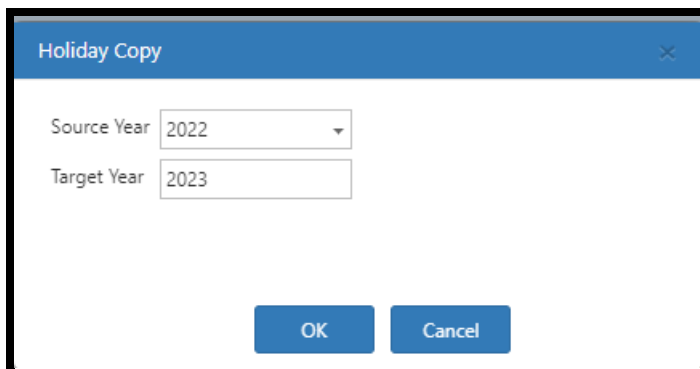
### Setup Public Holiday for the New Period




Following section covers the steps to set up the **Public Holidays** for the new period.

**Access: Leave Module > Reference > Holiday**



1. Navigate to **Holiday** menu
2. Select the **Year**.
3. Click on the  icon.
4. Specify the **Source Year** and **Target Year**.



5. Click on the  button. System will copy all the holiday dates from the **Source Year** to the **Target Year**.
6. Click on the **+** add icon to add new holiday date(s) under the new period.
7. Click on the  edit icon to update the date and name of the existing holiday record(s).
8. Click on the  button to save record.

## Leave Forfeiture

### Preparation for Leave Forfeiture

**Leave Forfeiture** is required when a company has a policy where the employees' carry forward leave (from previous year) needs to be consumed by certain period and any unconsumed days will be forfeited.

### Leave Processing

Perform **Leave Processing** as at the date of **Carry Forward Expiry Date** (can be found in **Employee's Leave Status**).

**Access: Leave Module > Leave > Leave Status**

The screenshot shows the 'Leave Status' window for employee SG0001. The 'Filter' section includes Company (BIPOSG - BIPO Singapore Pte), Year (2022 (ACTIVE)), and Employee (SG0001). The 'Leave with Entitlement' tab is active, displaying a table with columns: Leave Code, Leave Name, Parent Leave, Unit Type, C/F Balance, C/F Taken, Earned, Taken, Adjustment Taken, Adjustment Remarks, Balance, and Pending Approval. The table shows SGANL Annual Leave with a balance of 22.50. Below the table, various fields are displayed, including 'Carry Forward Expiry' set to 31/03/2022, 'Current Entitlement' of 21.00, and 'Last Year Forfeited' of 5.00. Buttons for 'Spreadsheet', 'Update', 'Delete', and 'Close' are at the bottom.

**Access: Leave Module > Leave > Leave Processing**

The screenshot shows the 'Leave Processing' window. The 'Date Process' field is highlighted with a red box and set to 31/03/2022. Below it, the 'Leave Codes' field contains 'SGANL'. There is a checkbox for 'Compute next year advance (based on entitlement this year)'. The 'Employee Range' is '(0=0)'. At the bottom, there are buttons for 'Process', 'Forfeit', 'Encash', and 'Encash Carry Forward'.

1. **Date Process** – Select **Date Process** (as at the date of Carry Forward Expiry Date)
2. **Leave Codes** – Select the **Leave Code(s)** to process.
3. **Employee Range** – Specify the employees to process.
4. Click **Process** button.

**Note:** Ensure that all leave records for the period have been entered and approved in the system. Repeat the steps above if there are newly added/approved records.

### Generate Annual Leave Status Report

Generate **Annual Leave Status Report** and/or **Leave Record Report** and check that the annual leave details and balances for all employees are correct.

**Access:** *Leave Module > Report > Annual Leave Status or Other Leave Status*

The screenshot shows the 'Annual Leave Status Report' configuration interface. It features several input fields and checkboxes. The 'Leave Period' is set to 'ACTIVE', 'Leave Codes' to 'SGANL', 'Print For' to 'Existing' with a date of '31/12/2022', and 'Available Balance Based On' to '31/12/2022'. Below these are three unchecked checkboxes: 'Company as report header', 'Exclude Future Leave', and 'Include Time-Off Taken'. A 'Query' dropdown is set to 'Default' with icons for search, add, delete, refresh, and save. The 'Range' is set to 'All Records'. At the bottom, there are three buttons: 'Preview', 'Export', and 'Spreadsheet'.

1. Specify the **Leave Period, Leave Codes, Print For,** and **Available Balance Based On** fields accordingly.
2. Tick on the necessary options.
3. Specify the **Employee Range** (if applicable).
4. Click on the **Preview, Export,** or **Spreadsheet** button to generate the report in the respective format.

## Perform Leave Forfeiture

Access: **Leave Module > Leave > Leave Processing**

1. **Date Process** – Select **Date Process** (*as at the date after Carry Forward Expiry Date*).
2. **Leave Codes** – Select the Leave Code(s) to process.
3. **Employee Range** – Specify the employees to process.
4. Click **Forfeit** button to forfeit the Carry Forward balances that have yet to be cleared.

Upon **Forfeiture**, the system will update the value under **Forfeited** field in **Employee's Leave Status** (if any).

Access: **Leave Module > Leave > Leave Status**

Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	Pending Approval
SGANL	Annual Leave		Days	7.00	1.00	21.00	5.50	0.00		16.50	0.00
	Carry Forward			7.00					Next Year Advance	0.00	
	Carry Forward Expiry								Next Year Taken	0.00	
	Carry Forward Taken			1.00					Next Year Pending Approval	0.00	
	Carry Forward Encashed			0.00					Period Start	01/01/2022	
	Earned			21.00					Period End	31/12/2022	
	Additional Earned			1.00					Date Start	01/01/2022	
	Taken			5.50					Date End	31/12/2022	
	NPL Penalty			0.00					Date Process	31/12/2022	
	Adjustment Taken			0.00					Service Year	7	
	Adjustment Remarks								Current Entitlement	21.00	
	Forfeited			6.00					Full Year Entitlement	21.00	
	Encashed			0.00					Full Year Earned	21.00	
	Exit Encashed			0.00					Last Year Balance	12.00	
	Exit Forfeited			0.00					Last Year Forfeited	5.00	
	<b>Balance</b>			16.50					Last Year Encashed	0.00	
	Pending Approval			0.00							
	Pending Encashed			0.00							

**Note:** Before **Leave Processing Forfeiture** is performed, the *Forfeited* field value was 0.00 days. Only after the forfeiture processing is performed, the *Forfeited* field displays 6.00 days (leave forfeited).

### Perform Leave Processing after Forfeiture

Perform **Leave Processing** to compute the entitlement for the period. It could be end of the following month or year (i.e., 31st Dec of the period), depending on the company's policy.

**Access:** *Leave Module > Leave > Leave Processing*

**Note:** Generate **Annual Leave Status Report**. Check through the records and ensure that the *Forfeiture* process has been performed correctly.

### Adjust Forfeited Value (Optional)

**Adjust Forfeited** value in **Leave Status** (if required). Ensure that the *Year* selected is correct.

**Access:** *Leave Module > Leave > Leave Status*

The screenshot shows the 'Leave Status' interface for employee SG0001 - Scarlett Sim Xue Er. The 'Year' is set to 2022 (ACTIVE). The 'Forfeited' field is highlighted with a red box and contains the value 6.00. The 'Update' button at the bottom is also highlighted with a red box.

Leave Code	Leave Name	Parent Leave	Unit Type	C/F Balance	C/F Taken	Earned	Taken	Adjustment Taken	Adjustment Remarks	Balance	Pending Approval
SGANL	Annual Leave		Days	7.00	1.00	21.00	5.50	0.00		16.50	0.00

Carry Forward: 7.00  
 Carry Forward Expiry: 31/03/2022  
 Carry Forward Taken: 1.00  
 Carry Forward Encashed: 0.00  
 Earned: 21.00  
 Additional Earned: 1.00  
 Taken: 5.50  
 NPL Penalty: 0.00  
 Adjustment Taken: 0.00  
 Adjustment Remarks:   
**Forfeited: 6.00**  
 Encashed: 0.00  
 Exit Encashed: 0.00  
 Exit Forfeited: 0.00  
**Balance: 16.50**  
 Pending Approval: 0.00  
 Pending Encashed: 0.00

Next Year Advance: 0.00  
 Next Year Taken: 0.00  
 Next Year Pending Approval: 0.00  
 Period Start: 01/01/2022  
 Period End: 31/12/2022  
 Date Start: 01/01/2022  
 Date End: 31/12/2022  
 Date Process: 31/12/2022  
 Service Year: 7  
 Current Entitlement: 21.00  
 Full Year Entitlement: 21.00  
 Full Year Earned: 21.00  
 Last Year Balance: 12.00  
 Last Year Forfeited: 5.00  
 Last Year Encashed: 0.00

Buttons: Spreadsheet, Update, Delete, Close

1. Modify the **Forfeited** value.
2. Click  to save the record.
3. Perform **Leave Processing** again to recompute.

## Flexible Leave Report

The **Flexible Leave Report** allows user to configure the report information according to certain requirements.

### Leave Field

**Leave Field** is used to add an additional field to be reflected in **Flexible Leave Report**.

**Access: Leave Module > Reference > Leave Field**

+	Country/Region	Code	Name	No.	Type
	Global	PHANL2	Entitlement + 2	1	Numeric

Country/Region	Global	No.	1
Code	PHANL2	Type	Numeric
Name	Entitlement + 2		
Expression	Ls.Entitlement + 2		

1. Click **+** to add a new **Leave Field**. Clicking allows user to edit the existing **Leave Field**.
2. **Country / Region** – Select if:
  - a. Global – Leave Field will be available to all countries.
  - b. Country – Leave Field will be country-specific.
3. **Code** – Enter a unique code for **Leave Field**.
4. **Name** – Indicate the name of the **Leave Field** to be created.
5. **Expression** – User needs to manually enter the expression following the formula needed to appear in the report.  
Refer to [Expression Configuration](#) section for the steps to configure the Expression.
6. **No** – Sequence order.
7. **Type** – Select the type of **Leave Field** related to the Expression.
  - a. Character
  - b. Date
  - c. Numeric
8. Click on the **Update** button to save the record.
9. The **Leave Fields** created will be shown in the dropdown **Field** list under **Leave Module > Report > Flexible Leave Report**, as shown:

**Flexible Leave Report**

Leave Period: ACTIVE

Print For: All, 18/02/2021

Company as report header

Template: Default

Report Title: [Empty]

Leave Codes: \*

Paper Size: Landscape

Report Type: Detailed

Leave Approval Status:  Approved,  Rejected,  Cancelled,  Withdrawn,  Pending Approval

For Self Service Users: None

No.	Field	Column Title
1	[Dropdown]	

Query: Default

Range: All Records

- Prior Year Carry Forward Expiry
- Prior Year Carry Forward Taken
- Prior Year Carry Forward Forfeited
- ==Leave Field==
- Leave Earned +1
- Leave Entitlement + 1
- Leave Code + Company Code

10. User can configure the *Flexible Leave Report* including the fields created in *Leave Field* menu.

**Flexible Leave Report**

Leave Period: ACTIVE

Print For: All

Company as report header

Template: Sample Leave Report

Report Title: Sample Report

Leave Codes: PHANL

Paper Size: Portrait

Report Type: Detailed

Leave Approval Status:  Approved,  Rejected,  Cancelled,  Withdrawn,  Pending Approval,  Pending Cancellation

For Self Service Users: Global

No.	Field	Column Title	Display	Width (cm)	Format	Align	B	/	Sum	Avg
1	Employee Code	Employee Code	Display	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Leave Code	Leave Code	Code	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Leave Code + Company Code	Leave Code + Company Code		2.00		Left	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Entitlement	Entitlement		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Entitlement + 2	Entitlement + 2		2.00		Left	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Earned	Earned		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Earned + 3	Earned + 3		2.00		Left	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Flexible Leave Report Result.

BIPO Service Sample Report						
11/11/2020 (Wed) 10:55:47			All Records Range: All Records		hrm - Page 1 of 1	
Employee Code	Leave Code	Leave Code + Company Code	Entitlement	Entitlement + 2	Earned	Earned + 3
<b>Company</b> BIPOMY BIPO Service Malaysia Sdn. Bhd						
MY001	PHANL	PHANLCO555	19.00	21.00	16.00	19.00
MY01	PHANL	PHANLCO555	0.00	2.00	0.00	3.00
<b>Company</b> CO555 / Company 555						
Employee 0001	PHANL	PHANLCO555	18.00	20.00	15.00	18.00
Employee 0002	PHANL	PHANLCO555	18.00	20.00	15.00	18.00
Employee0001	PHANL	PHANLCO555	18.00	20.00	5.00	8.00
JML001	PHANL	PHANLCO555	18.00	20.00	15.00	18.00
JML008	PHANL	PHANLCO555	18.00	20.00	15.00	18.00
<b>Record Count</b>		7				

Creating a Flexible Leave Report Template

Access: Leave Module > Report > Flexible Leave

**Flexible Leave Report**

Leave Period: ACTIVE

Print For: Existing

Available Balance Based On: (Estimation based on prorated by days of Full Year Earned)

Company as report header

Exclude Future Leave

Template: Leave Report

Report Title: Leave Record Report

Leave Codes: \*

Approval Status: \*

Paper Size: Landscape  Cell Border Line  Show Running Number in Spreadsheet




Report Type: Detailed  Hide Grouping Fields in Spreadsheet

For Self Service Users: None  Sorting/Grouping: Default

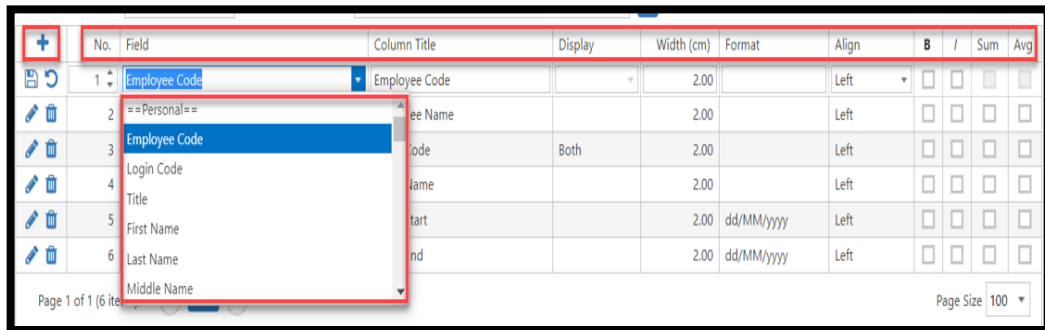
No.	Field	Column Title	Display	Width (cm)	Format	Align	B	I	Sum	Avg
1	Employee Code	Employee Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Employee Name	Employee Name		4.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Join Date	join date		2.00	dd-MMM-yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Leave Code	Leave Code	Both	2.00		Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Carry Forward	Carry Forward		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Carry Forward Taken	Carry Forward Taken		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Carry Forward Expiry	Carry Forward Expiry		2.00	dd-MMM-yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Earned	Earned		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	Taken	Taken		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Balance	Balance		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	Pending Approval	Pending Approval		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23	Service Length Total	Service Length Total		2.00	[yymm]	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24	Leave Grade	Leave Grade	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25	Designation	Designation	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1 (14 items) Page Size 50

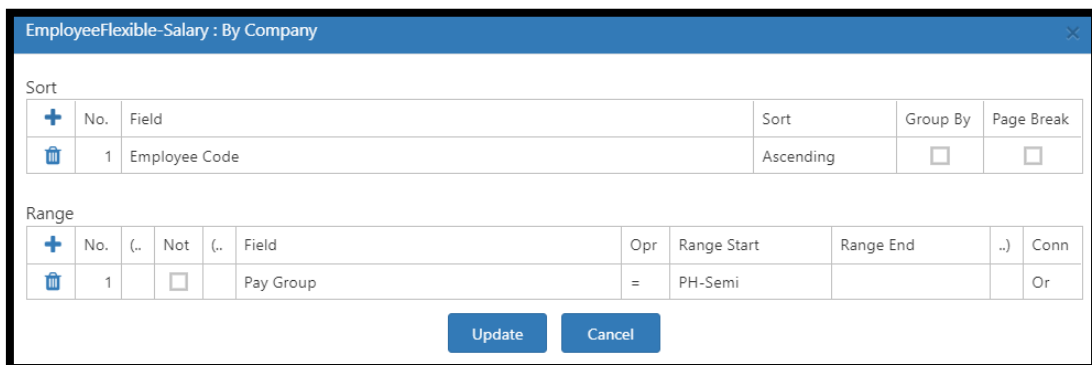
1. Click **+** to create a new template. Enter the template name.

2. **Leave Period** – Select the Year or Leave Period to be covered in the report.
3. **Print for** - The filter allows the user to set **All**, **Existing** or **Resignees** based on the date defined.
4. **Available Balance Based On** – System will show the estimated Earned column as of the date defined. If no value is defined, system will show the Earned column according to the Leave Status screen.
5. **Company as report header** – Tick to enable and display in the report header.
6. **Exclude Future Leave** - When it is ticked, system will exclude the leave taken after the date defined under Available Balance Based On from the Taken column.
7. under Available Balance Based On from the Taken column.
8. **Template** – A drop-down selection of templates that have been created.
9. **Report Title** – A free-text to enter the report title that will display in the report.
10. **Leave Codes** – Click  to specify the Leave Codes that will be included in the report. \* Means all Leave Codes.
11. **Approval Status** – Select the approval status of the leave that will be included in the report. \* Means all approval status.
12. **Paper Size** – Select between Portrait or Landscape.
13. **Report Type** – Select between:
  - a. Summary – Report will be presented in summarized and in grouping.
  - b. Detailed – Report will be presented per employee.
14. **For Self Service Users** – Select if this template will be available in **ESS** for **Global**, **Country Specific** or **None**.
15. **Cell Border / Hide Grouping Fields in Spreadsheet / Show Running Number in Spreadsheet** – Tick to enable and reflect in the output report.
16. **Sorting/Grouping** – Select the created **Query** from this field. If a **Query** has just been added or created, click  to refresh and display the new **Query**.
17. **Configure the Report Header**
  - a. Click  to add a field.
  - b. **No** is a sequence order in the report header.
  - c. Select the **Field** that will be included in the report and will serve as a header.
  - d. Edit **Column Title** to change the header name in the report. This is default to **Field** name.

- e. **Display** will be depending on the selected **Field**. For some **Field**, it could be greyed out while some fields can be selected to display as **Code, Name or Both**.
- f. **Width (cm) / Format / Align / B and I** – Used to format the column and header fields in the report.
- g. **Sum / Average** – can be checked when the field is numeric. It is needed to select **Summary** in **Report Type** as it will calculate the total amount of balance.

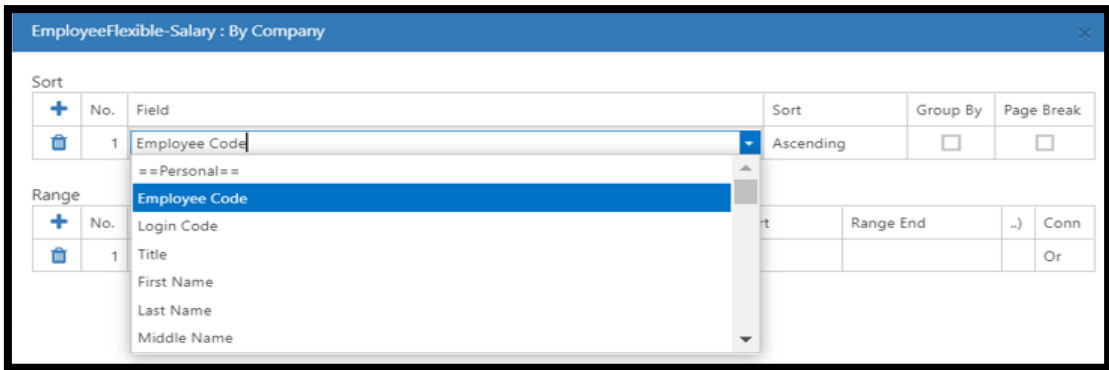


18. **Query** – It is used to set the condition of range to be included in the report. It has a default query intended for every report. To set a query according to your own specification, click **+** to add a new **Query** and enter the **Query** name.

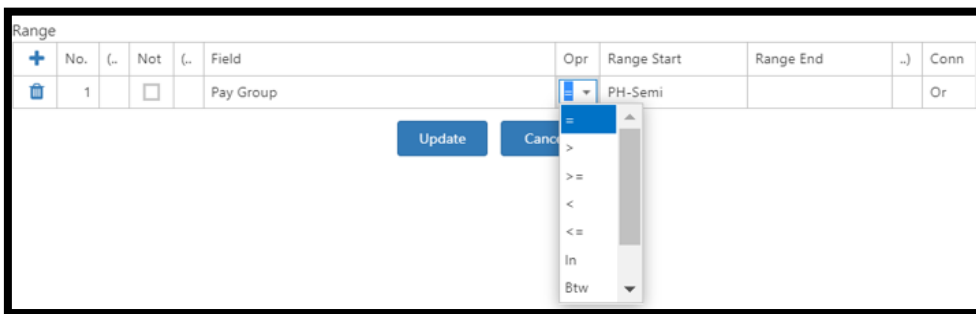


Click **+** to add a filter in **Sort** and **Range**. **No** means the order sequence if having multiple fields.

Select in the drop-down list of field to set how to filter employee and select the **Sort** order.



In **Range**, Set “Opr” as this will be the formula from the given Range Start and Range End.



- = means can select only one value in Range Start
- **In** means can select several values in Range Start
- **Between** means need to set value in Range Start and Range End
- >= means the field must large or equal the value set in Range Start

The **Conn** column is used if having multiple Range. Values given are **And** and **Or**, then click **Update**.

19. Click **Preview, Export or Spreadsheet** button to generate the report.

BIPO Service Flexible Leave Report					
01/12/2021 (Wed) 20:57:12		Period: ACTIVE. All Records.			hrm - Page 1 of 25
Employee Code	Employee Name	Leave Code	Leave Name	Leave Start	Leave End
00002	Employee 00002	EL-AAA / Annual Leave	Annual Leave	02/02/2021	02/02/2021
00002	Employee 00002	EL-AAA / Annual Leave	Annual Leave	03/03/2021	03/03/2021
00002	Employee 00002	EL-AAA / Annual Leave	Annual Leave	15/09/2021	15/09/2021
00002	Employee 00002	MARL / Marriage Leave	Marriage Leave	18/05/2021	18/05/2021
00002	Employee 00002	MMUPL / MM-MM - Unpaid Leave	Unpaid Leave	08/03/2021	08/03/2021
00002	Employee 00002	MYANL / Annual Leave MY	Annual Leave MY	05/01/2021	05/01/2021
00002	Employee 00002	MYANL / Annual Leave MY	Annual Leave MY	09/02/2021	09/02/2021

**Note:** There are 2 checkboxes in User Access to control if user can set up templates or query in Leave Module. When it is ticked, the Report and Query Template will be disabled for corresponding user in the Flexible Leave Report. User will not be able to modify the Template / Query shared to them as well.

**Access:** Setup > Security > User Access > Leave System

Leave (0=0)

User: HRM  Disable Template  Disable Query

System: Leave

Flexible Leave Report

Leave Period: ACTIVE

Print For: Existing

Available Balance Based On: (Estimation based on prorated by days of Full Year Earned)

Company as report header

Exclude Future Leave

Template: Leave Record Report V2

Report Title: Leave Record Report

Leave Codes: \*

Approval Status: \*

Paper Size: Landscape  Cell Border Line  Show Running Number in Spreadsheet

Report Type: Detailed  Hide Grouping Fields in Spreadsheet

For Self Service Users: None  Sorting/Grouping: Default

No.	Field	Column Title	Display	Width (cm)	Format	Align	B	/	Sum	Avg
1	Employee Code	Employee Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Employee Name	Employee Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Leave Start	Leave Start		2.00	dd-MM-yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Leave End	Leave End		2.00	dd-MM-yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Leave Code	Leave Code	Both	4.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Remarks	Remarks		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Half Start	Half Start		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	Half End	Half End		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25	PaymentPR	PaymentPR		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28	Days	Days		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Query: Default

Range: All Records

## Appendix 1

### Setting Up Query

**Query** is used to set the following:

1. **Sorting** – determines how the report output will be sorted, whether it will be sorted by the Employee Code, Employee Name, etc.
2. **Grouping / Page Break** – determines whether the report output will need to be grouped by certain fields, e.g., group by company, department, etc.
3. **Range** – determines the range of employees to be included in the report, e.g., only generate employees under certain department, company, etc.

The following section covers how to set the query and the steps to create / delete / distribute the query template.


There are 2 ways to define the query:

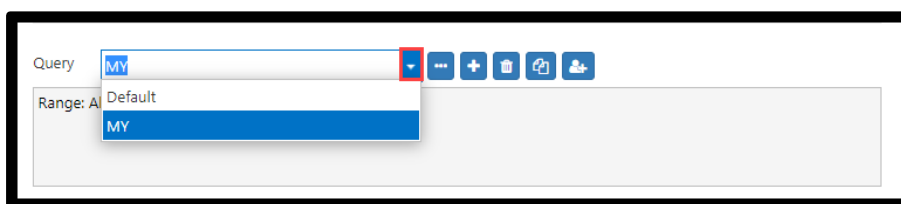
1. Select the *Query Template* from the previously created template.
2. Define the *Query* manually.

#### Select the Query Template

If user has created query template previously, the template will be shown in the drop-down query selection.

Following are the steps to set the query range from the existing query template:

1. Click on the  icon under the **Query**, as shown:



2. Select the query template and system will auto populate the query.


#### Define the Query

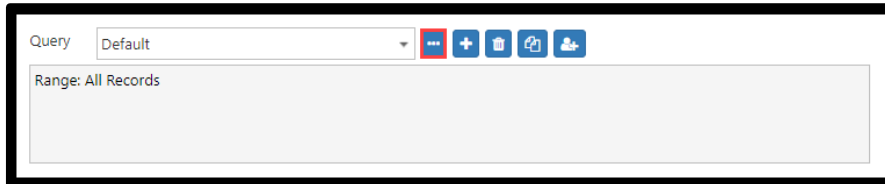
The following section covers the steps to define *Sorting*, *Grouping* and *Page Break*, and *Query Range*.

For *ad-hoc query generation*, it is recommended to use the *Default* query template. For *query that will be used often*, it is recommended to *create a specific query template*.

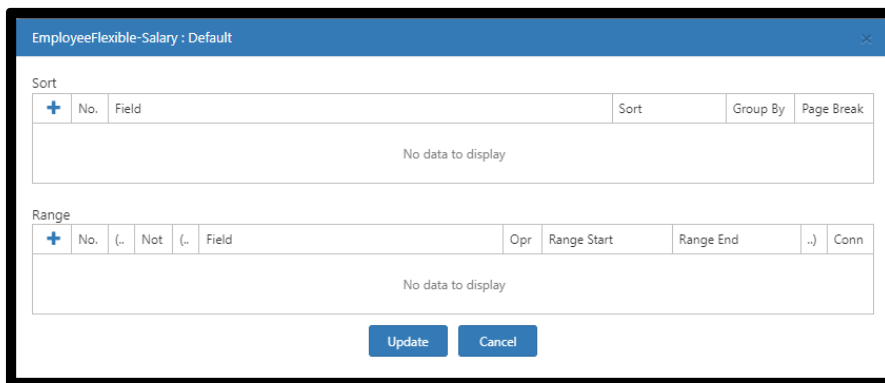
### Sorting


Following are the steps to define the sorting:

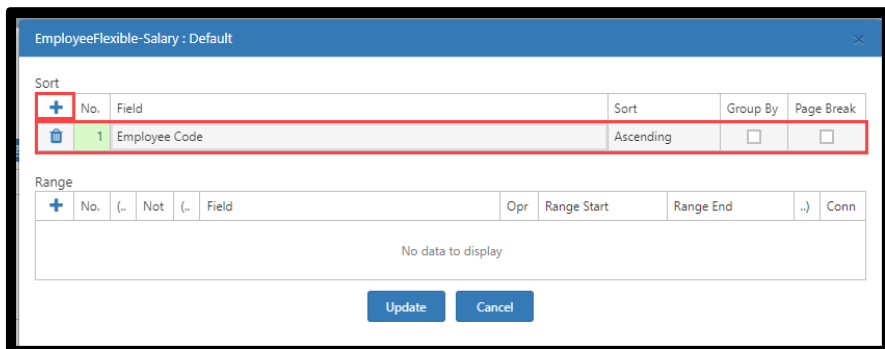
1. Click the  icon at the Query section, as shown:




The following window will appear:

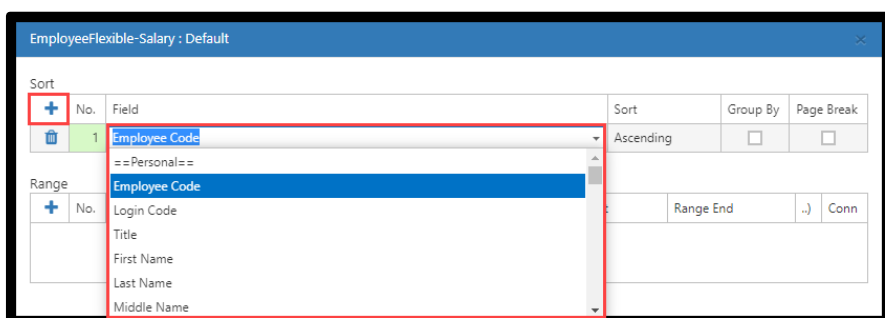


2. Click the  icon under Sort section and new line will appear, as shown:



Click on the  icon to delete the selected field.

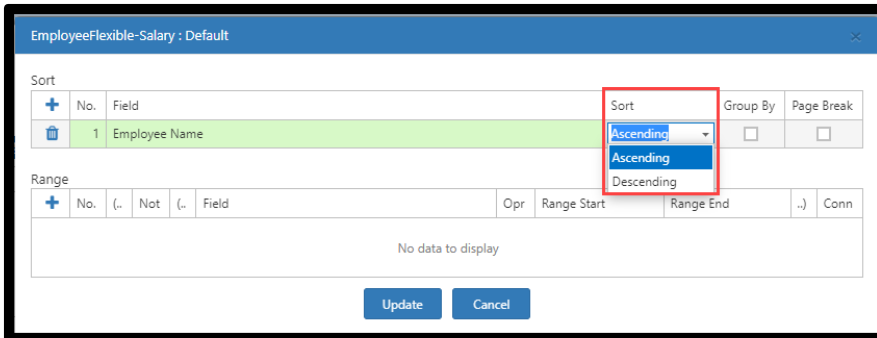
3. Select the field on which the report output is to be sorted on.




For example, if the report output needs to be sorted based on employee name,

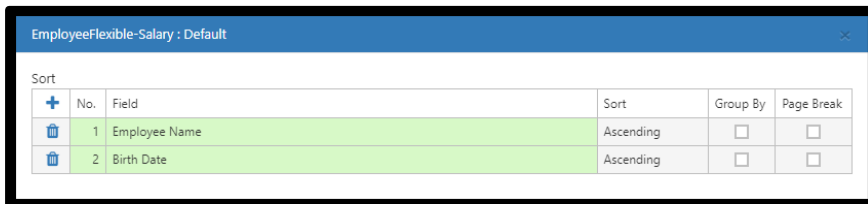
select *Employee Name* under the field.

4. Define the *Sorting* method: *Ascending* or *Descending*.



5. Click on the **+** icon again to add another sorting field or click on the  icon to delete the selected field.

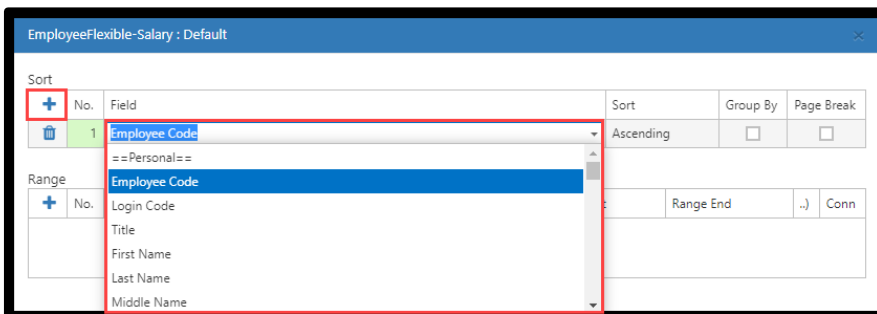
For example, the report needs to be sorted first by employee name and followed by date of birth, this can be set as follow:



### Grouping and Page Break

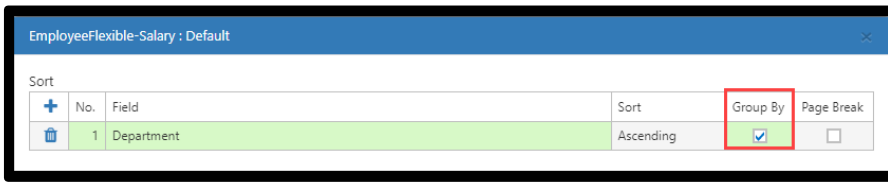
Following are the steps to define the *grouping/page break*:

1. Follow step 1 to 2 on steps to define the *sorting*.
2. Select the field on which the report output is to be grouped by.

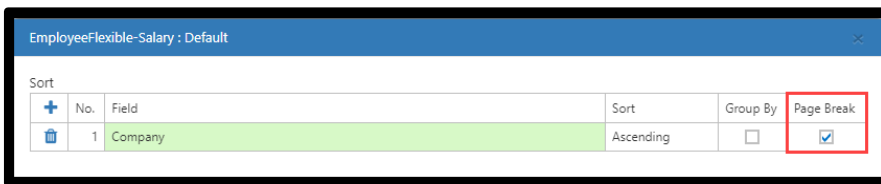


For example, if the report output needs to be grouped by department, select *Department* under the field.

3. Tick on the *Group By* column, as shown:



4. Click on the + icon again to add another grouping field.
5. If the report output needs to be page break by certain field, perform the same steps as above, but tick on the *Page Break* column, as shown:



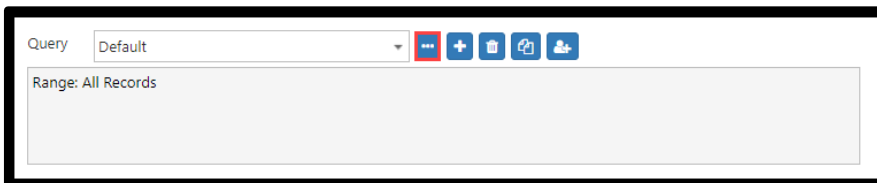
**Note:**

The order of the field is important, it is recommended to define fields that need to be grouped by in the smaller order number (*No.* field).

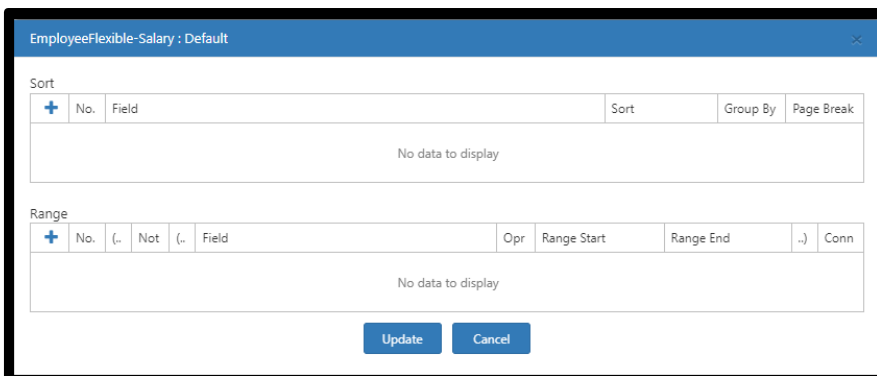
**Range**

Following are the steps to define the query range:

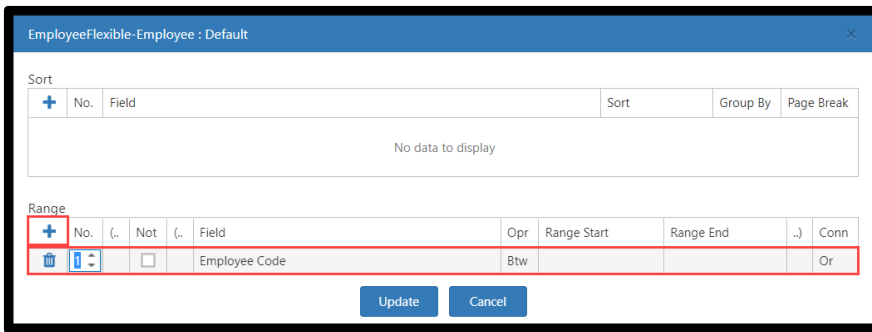
1. Click the ... icon at the *Query* section, as shown:




The following window will appear:



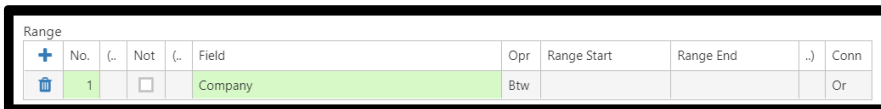
2. Click the + icon under *Range* section and new line will appear, as shown:



Click on the  icon to delete the selected field.

3. Select the field to be ranged upon.

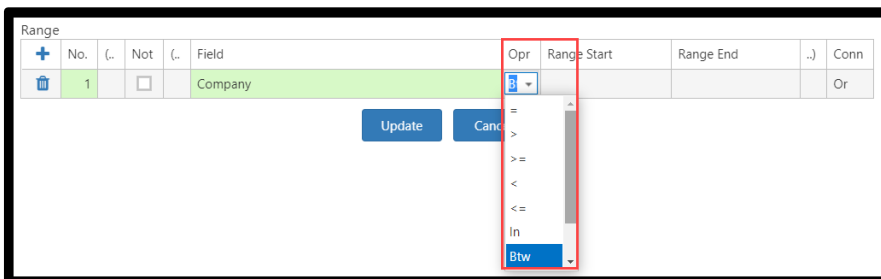
For example, if the report output to be generated is only for specific company, select *Company* field under the field.



4. Specify the *Opr*, *Range Start*, *Range End*, and *Conn* column to define the operator, the value range, and the connector if there are multiple conditions.

Opr

There are multiple operators that can be selected:



- '=' – refers to *equal* sign, which means the query range is for a specific value, e.g., Company = BIPOMY.

When '=' is selected, user only need to define the value under *Range Start* field.

- '>' / '<' – refers to *greater than / less than* sign, which means the query range is anything greater than / less than the specified value, e.g., Salary Gross > RM2,000 or Salary Gross < RM2,000.

When '>' / '<' is selected, user only need to define the value under *Range Start* field.

- '>=' / '<=' – refers to *greater than or equal / less than or equal* sign, which means the query range is anything greater than or equal to the specified value / less than or equal to the specified value, e.g., Salary Gross >= RM2,000 or Salary Gross <=

RM2,000.

When '>=' / '<=' is selected, user only need to define the value under *Range Start* field.

- 'In' – refers to multiple values under the defined field on which the value is not in order.

For example:

If user needs to generate report consist of employees A, D, G, and K, following is how to define the query range:

Range											
	+	No.	(.)	Not	(.)	Field	Opr	Range Start	Range End	..)	Conn
		1		<input type="checkbox"/>		Employee Code	In	A,D,G,K			Or

- 'Btw' – refers to *between*, which means the query range is between the value defined under Range Start and Range End (inclusive).

For example:

If user needs to generate report consist of employees between D to K, following is how to define the query range:

Range											
	+	No.	(.)	Not	(.)	Field	Opr	Range Start	Range End	..)	Conn
		1		<input type="checkbox"/>		Employee Code	Btw	D	K		Or

- 'Null' – refers to *empty*, which means the query range is to generate those records where the field defined has empty value.

For example:

If user needs to generate report for list of employees who has not been confirmed (Confirmation Date is empty), following is how to define the query range:

Range											
	+	No.	(.)	Not	(.)	Field	Opr	Range Start	Range End	..)	Conn
		1		<input type="checkbox"/>		Confirmed Date	Null				Or

When 'null' is selected, user does not need to define any value under *Range Start* and *Range End* fields.

- 'Like' – refers to the values of the field that start with specific word.

For example:

If user needs to generate report for list of employees whose designation starts

with 'HR' (HR Executive, HR Manager, HR Director, etc.), following is how to define the query range:

Range										
	No.	(.)	Not	(.)	Field	Opr	Range Start	Range End	(.)	Conn
	1		<input type="checkbox"/>		Designation	Like	HR			Or

### Range Start / Range End

Depending on the field selected, system may show the list of values corresponding to the field. To show the list of values, click on the icon under the *Range Start* / *Range End* field and a pop-up window will be shown with the list of values, as shown:

Range										
	No.	(.)	Not	(.)	Field	Opr	Range Start	Range End	(.)	Conn
	1		<input type="checkbox"/>		Company	Btw				Or

Select a value

#	Code	Name
<input type="radio"/>	BIPO	BIPO Singapore
<input type="radio"/>	BIPOAU	BIPO Australia
<input type="radio"/>	BIPOMY	BIPO Malaysia
<input type="radio"/>	BIPOSG	BIPO SG
<input type="radio"/>	BIPOSG2	BIPO SG 2

### Conn

The *Conn* field is used to connect 2 or more conditions. When there are more than 1 conditions defined, user needs to tell the system how the conditions are connected.

There are 2 values available under Conn:

- 'And' – The connector 'and' is used when the 2 conditions must be fulfilled.
- 'Or' – The connector 'or' is used when either one of the conditions needs to be fulfilled.

For example:

- To generate report that consist of only female employees under company=BIPOMY, following is how to define the query range:

Range										
+	No.	(..	Not	(..	Field	Opr	Range Start	Range End	..)	Conn
	1		<input type="checkbox"/>		Company	=	BIPOMY			And
	2		<input type="checkbox"/>		Gender	=	F			Or

- To generate report that consists of employees whose Leave Grade is under EXE or whose Pay Group is under EXE, following is how to define the query range:

Range										
+	No.	(..	Not	(..	Field	Opr	Range Start	Range End	..)	Conn
	1		<input type="checkbox"/>		Leave Grade	=	EXE			Or
	2		<input type="checkbox"/>		Pay Group	=	EXE			Or

### 'Not' Checkbox and Brackets

The 'not' checkbox is used when user wants to get the values other than what was being defined.

The 'brackets' are used to group the query range.

For example:

- If user needs to generate report for list of employees who has been confirmed (Confirmation Date is not empty). Following is one way to define the query range:

Range										
+	No.	(..	Not	(..	Field	Opr	Range Start	Range End	..)	Conn
	1		<input checked="" type="checkbox"/>		Confirmed Date	Null				Or

- If user needs to generate report for list of employees who has been confirmed (Confirmation Date is not empty) under HR Department. Following is the way to define the query range:

Range										
+	No.	(..	Not	(..	Field	Opr	Range Start	Range End	..)	Conn
	1		<input checked="" type="checkbox"/>		Confirmed Date	Null				And
	2		<input type="checkbox"/>		Department	=	HR			Or

- If user needs to generate report for list of employees who has been confirmed (Confirmation Date is not empty) under HR Department with nationality equals to Malaysian or holding MY01 Identity Type, following is the way to define the query range:

Range											
	+	No.	(..	Not	(..	Field	Opr	Range Start	Range End	..)	Conn
		1		<input checked="" type="checkbox"/>		Confirmed Date	Null				And
		2		<input type="checkbox"/>		Department	=	HR			And
		3		<input type="checkbox"/>		Nationality	=	MY			Or
		4		<input type="checkbox"/>		Identity Type	=	MY01			Or

5. Click on the *Update* button once the query range has been defined.

## Query Template

The following section covers the steps required to *Create / Update / Delete / Copy / Distribute* a query template.

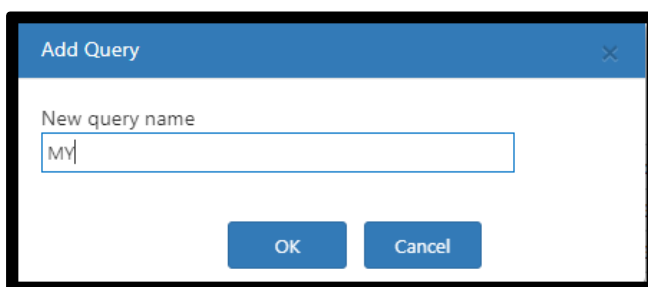
### Create a New Query Template

Following are the steps to create a new query template:

1. Click at the **Query** section.



2. Enter the **Query Name** and click on the **OK** button, as shown:



3. The query name will appear at the **Query** section.




4. Click on the to define the **Query Range**. Please refer to [Define the Query](#) section for the steps to define the sorting / grouping and/or query range.

### Edit Query Template

Following are the steps to edit an existing query template:

1. Select the **Query** to be modified from the drop-down **Query** selection.




2. Click on the  to make the necessary changes to the **Query Range**.
3. The query will be automatically saved upon clicking the **Update** button.

### Delete Query Template

Following are the steps to delete an existing query template:

1. Select the **Query** to be deleted from the drop-down **Query** selection.



2. Click on the  to delete the specific query template. Following confirmation window will be shown:

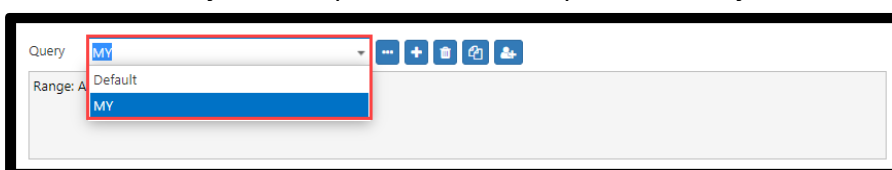



3. Click on the **OK** button to confirm the deletion.

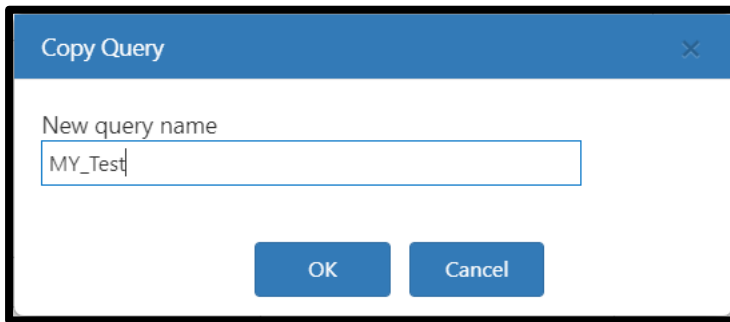
### Copy Query Template


Following are the steps to copy an existing query template to a new template:

1. Select the **Query** to be copied from the drop-down **Query** selection.



2. Click  to *copy* the query template.
3. Enter the **Query Name** and click on the **OK** button, as shown:




4. Click on the  to make the necessary changes to the newly copied query.

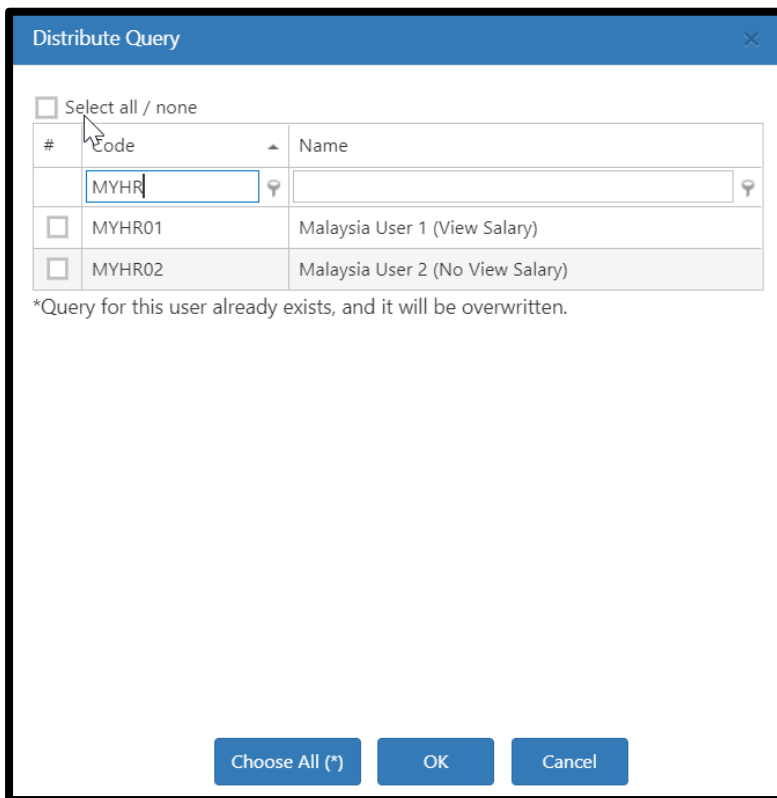
### Distribute Query Template

Following are the steps to distribute a query template to another user:

1. Select the **Query** to be distributed from the drop-down **Query** selection.



2. Click  to distribute the query template.
3. Select the user to distribute the query template with.

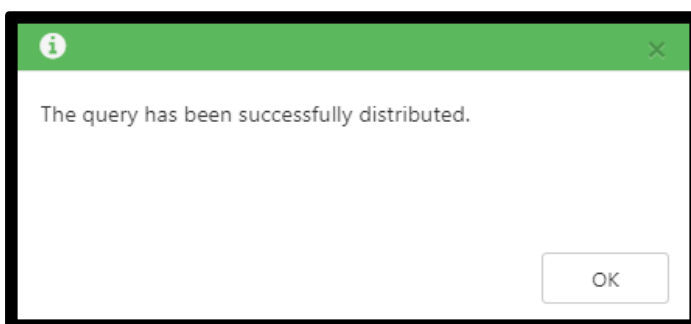


**Note:** System will overwrite the destination query if the recipient has a query template with the same name.

- Click on the **OK** button, system will prompt the following confirmation window:



- Click on the **OK** button and the following window will appear:



- Click on the **OK** button to close the window.

7. Any changes made to query template by the user who distributed the template, will not update the query template that had been distributed.

### Sample Expression Configuration

- Employee Entitlement + 2, as shown:

The screenshot shows the configuration for the expression "Entitlement + 2". The expression field contains "Ls.Entitlement + 2". Callouts explain that the "2" is added to the total of Entitlement to appear in the Flexible Leave Report, and that the expression will get the Leave Status Entitlement (Leave > Leave Status). A summary box shows: Leave Status Entitlement: 18, Additional: 2, Total: 20. A table below shows the Leave Status Entitlement details, with the Entitlement value of 18.00 highlighted.

PHANL	PH_Annual Leave	Days	0.00	15.00	1.00	0.00	0.00
Carry Forward	0.00					Next Year Advance	0.00
Carry Forward Expiry						Next Year Taken	0.00
Carry Forward Taken	0.00					Next Year Pending Approval	0.00
Carry Forward Encashed	0.00					Period Start	01/01/2020
Earned	15.00					Period End	12/31/2020
Additional Earned	0.00					Date Process	10/31/2020
Taken	1.00					Service Year	2
Adjustment Taken	0.00					Entitlement	18.00

- Employee Earned + 3, as shown:

The screenshot shows the configuration for the expression "Earned + 3". The expression field contains "Ls.Earned + 3". Callouts explain that the "3" is added to the total of Earned to appear in the Flexible Leave Report, and that the expression will get the Leave Status Earned (Leave > Leave Status). A summary box shows: Leave Status Earned: 15, Additional: 3, Total: 18. A table below shows the Leave Status Earned details, with the Earned value of 15.00 highlighted.

PHANL	PH_Annual Leave	
Carry Forward	0.00	
Carry Forward Expiry		
Carry Forward Taken	0.00	
Carry Forward Encashed	0.00	
Earned	15.00	
Additional Earned	0.00	
Taken	1.00	

- The Company Code will be combined with the Leave Code, as shown:

The screenshot displays a BIPO configuration interface for leave codes. At the top, there is a table listing existing leave codes:

Country/Region	Code	Name
Global	PHANL2	Entitlement + 2
Global	PHANLRN3	Earned + 3
Global	LVCCom	Leave Code + Company Code

Below the table is a configuration form for a new leave code:

- Country/Region: Global
- Code: LVCCom
- Name: Leave Code + Company Code
- Expression: `!s.leavecode + 'CO555'`

Annotations explain the expression: `!s.leavecode` is highlighted in red, with a callout stating "This will get the Leave Code in Leave Status (Leave > Leave Status)". The `'CO555'` is also highlighted in red, with a callout stating "Company Code 'CO555' will be added in the Leave Code to appear in Flexible Leave Report".

On the right, a blue box summarizes the result: "Leave Code: PHANL, Company Code: CO555, PHANLCO555".


At the bottom right, a data table shows the result of the configuration:

	PHANL	PH_Annual Leave	Days
Carry Forward		0.00	
Carry Forward Expiry			


## Appendix 2: Selecting the Employee Range

The Employee Range settings allow you to filter which employees are included when running a process or report. Follow the steps below to configure your filter criteria.

### Opening the Employee Range

1. Click  icon to open Employee Range settings.



2. Click  to enter a new filter criteria row.

### Configuring the Filter Criteria

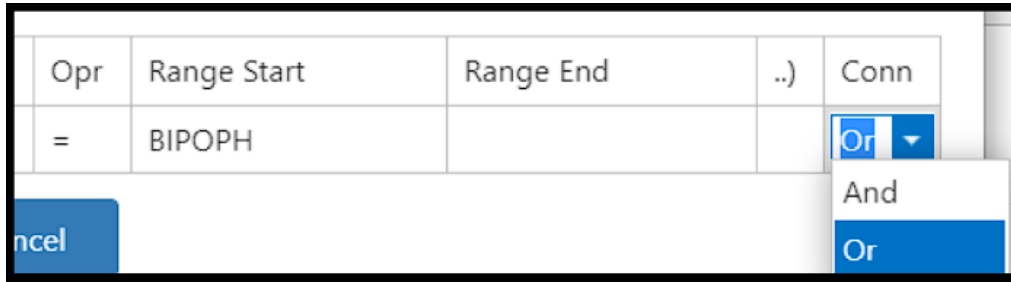
Once a row is added, configure the following columns:

- **Field** - Select the employee data field you want to filter by (e.g., Employee Code, Gender, Department, Salary Fixed) from the drop-down list.
- **Opr (Operator)** - Select the operator that defines how the filter should be applied against the value(s) entered in the Range Start and Range End fields. Refer to the table below for guidance.

Operator	Description	Logic / Usage
=	Equal to	Use when filtering for one specific value (e.g., a single Employee Code).
>	Greater than	Use to select values strictly higher than the Range Start value (excluding the start value itself).
>=	Greater than or equal to	Use to include the Range Start value and all values above it (e.g., Salary >= 3,000).
<	Less than	Use to select values strictly lower than the Range Start value.

Operator	Description	Logic / Usage
<=	Less than or equal to	Use to include the Range Start value and all values below it.
In	In a list	Use to select multiple specific, non-consecutive values (e.g., Departments: Sales, HR, IT).
Between	Range (inclusive)	Use to select all values from Range Start through Range End (e.g., Dates between 1 Jan and 31 Jan).
Null	Is empty / No value	Use to find records where the selected field contains no data (e.g., employees with no Email Address on file).
Like	Partial match	Use to search by partial text. Returns all values containing the entered text (e.g., entering "Smi" will return "Smith" and "Smithsonian").

- **Range Start / Range End** - Enter the value or values the filter should be applied against. For the **Between** operator, enter the lower boundary in Range Start and the upper boundary in Range End.
- **Conn (Connector)** - If you are adding multiple filter rows, use the Conn column to define how the rows relate to each other. Select **And** to require all conditions to be met, or **Or** to return results matching any one condition.



3. Once all criteria are configured, click **Update** to save your settings.

### Common Examples

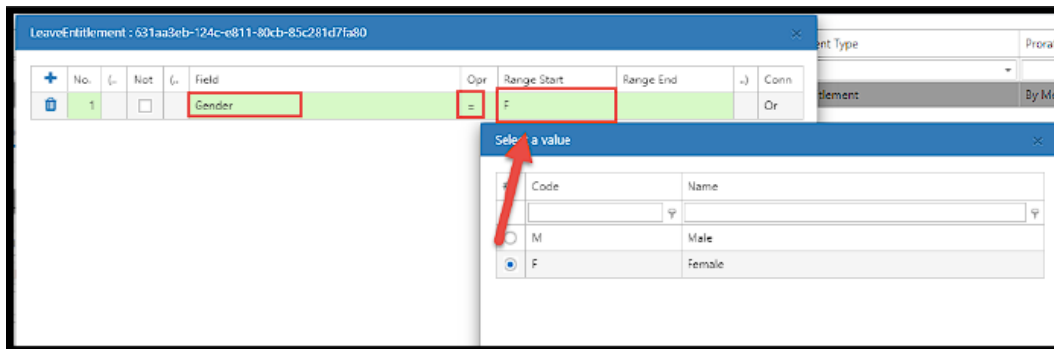
To include all employees:

1. Open the Employee Range settings.
2. Without adding any filter criteria, click Update.
3. The system will display (0=0), confirming that all employees are included.



To filter for female employees only:

1. Open the Employee Range settings.
2. Click Add to insert a filter row.
3. Set Field to Gender, Opr to =, and select value as F in the Range Start field.



4. Click Update to save.

