LEAVE & HR MODULE
GUIDE FOR MODULE OWNER/ADMIN STAFF

YEAR END PROCESS

This covers the steps to be done in the leave module before 1st January of every year.

1. Holiday Calendar

The holiday calendar which includes the list of holidays and restricted holidays need to be uploaded on to ERP system. Provide the holiday list in the excel template and send it to ERP team to be uploaded from backend.

The holidays can be included one by one from the front end at below path.

Leave Management / Holiday Calendar

This holiday calendar is applicable for students and employees.

2. Leave Closure

On 31st December every year, close all the leave policies and create new leave policies for the next year. Until the leave policies are created by the Admin, none of the employees will be able to apply leave through ERP

HOW TO CANCEL APPROVED LEAVE IN ERP AS ADMIN

1. Login with "Leave Module owner" role.
2. Follow the path: Leave approval – Leave Approval
3. Select the leave status as "Approved"
4. Select the From Date and To Date. Ensure to select correct dates and click Go.
5. Under the Actions column, click trash icon of the particular employee to cancel the leave. Ensure to enter Remarks and click Save.
6. Now the leave will be canceled and the leave balance is credited back to the respective requester.

HOW TO ADJUST LEAVE BALANCE OF EMPLOYEE

1. Login with Leave Module owner role
2. Follow the path: Leave Management – Leave Adjustment
3. Select Employee by entering the name and click Go
4. Select the check box of corresponding leave type and adjust the leave balance.

HOW TO CHANGE SERVICE STATUS IN ERP

1. Select HR Admin role after your login
2. Click Human Resources - Change Service Status
3. Click "Add"
4. Select Employee by typing the name
Now you can change the status.

HOW TO CHANGE EMPLOYEE DATA

1. Select HR Admin role after your login
2. Click Human Resources – Employee Register
3. Make the required selections.
4. Under the actions column, click the edit button and make changes for the employee.