Leave Admin

Overview

Leave Admin user can use Leave model for leave related activities.

Following activities are possible in the Leave Model:
1. Creation of Master Data
2. Admin Transactions
3. Leave Reports

Master Data: Data that is required/pre-requisite to drive a functionality is known as "Master Data".

Standard Steps:

User can follow standard steps to create/ Search any data in the model (E.g. Creation of Leave Type).

Steps for Creation:

User can follow these steps to create new data (For e.g. Leave Type creation):

1. Login at Campuslabs ERP with your credentials.
2. Select "Leave Module-owner" role.
3. Click on "Leave Management" from left menu pane.
4. Click on "Leave Administration" option.
5. Click on "Leave Type" from top menu pane.
6. Click on "Add" icon, form for leave type creation will be opened.

Figure- Leave Type Creation
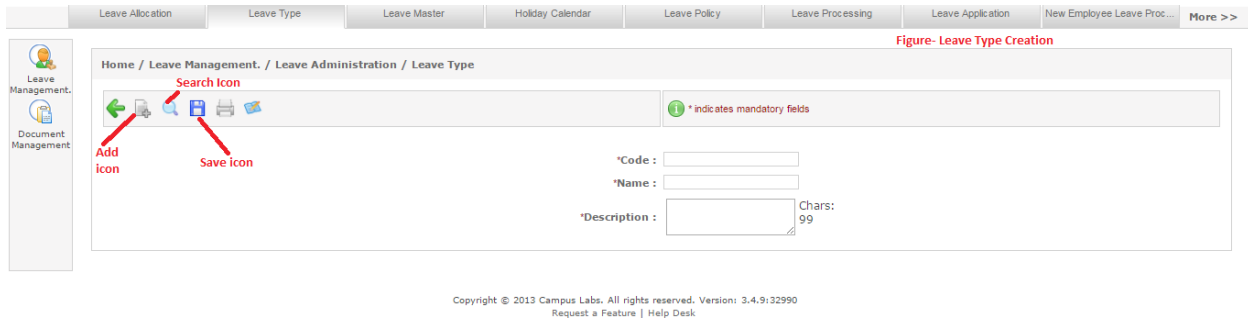
7. Enter values related to Leave type code, name and description.
8. Click on "Save" icon.

This will create new leave type.

Steps for Searching:

User can follow these steps to Search existing data (For e.g. Search for Leave Master):

1. Click on "Leave Master" tab from top menu pane.
2. Enter/Select the value for Search filters.
3. Click on "Go" button to see the search results.

Figure-Search Leave Master
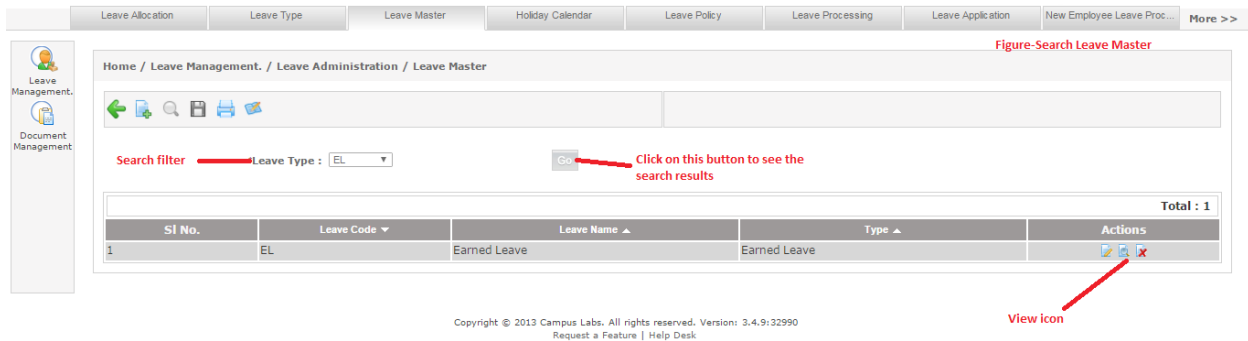
4. Click on "View" button to view the details of respective record.

These are the standard steps for searching data.

Steps for Editing:

User can follow these steps to Edit existing data (For e.g. Search for Leave Master):

1. Click on "Leave masters" from top menu pane.
2. Search the record which you want to edit using standard searching steps.


3. Click on "Edit" icon associated with the record, form with existing details should be opened.
4. Change/edit the values as per requirements.
5. Click on "Save" icon.

Changes to the respective record will be saved.

Steps for Deletion:

User can follow these steps to Delete existing data (For e.g. Search for Leave Master):
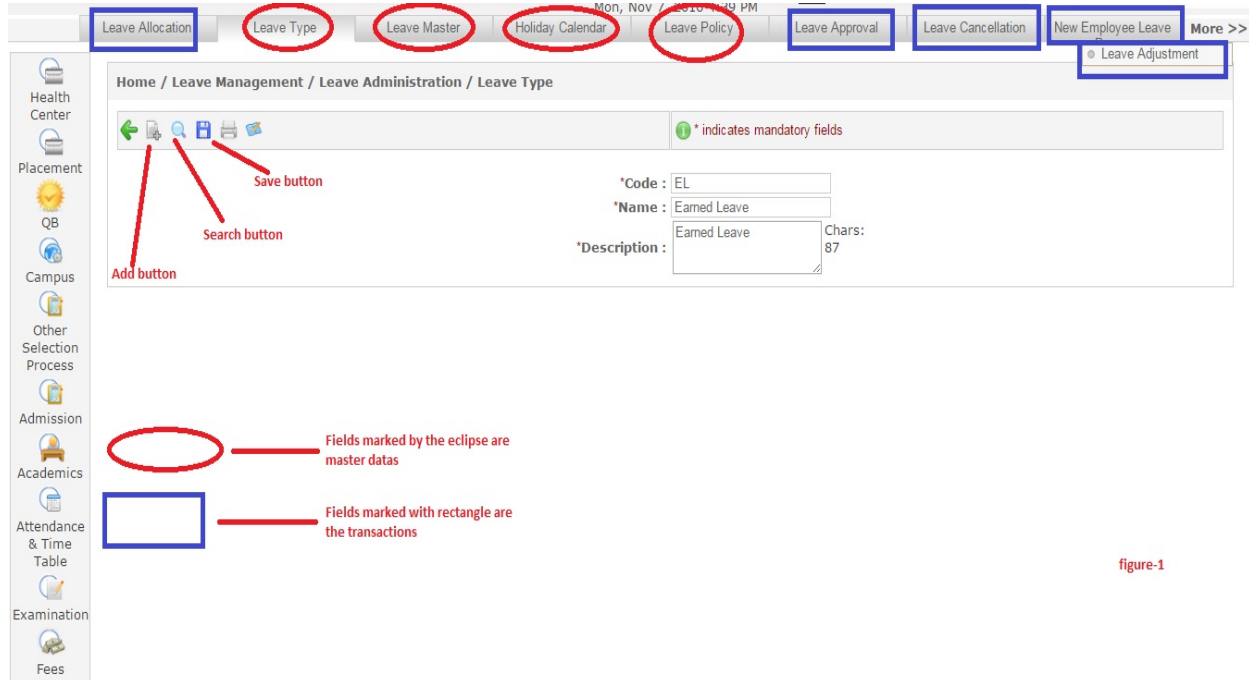
1. Click on "Leave masters" from top menu pane.
2. Search the record which you want to delete using standard search steps.
3. Click on "Delete" icon associated to the record.
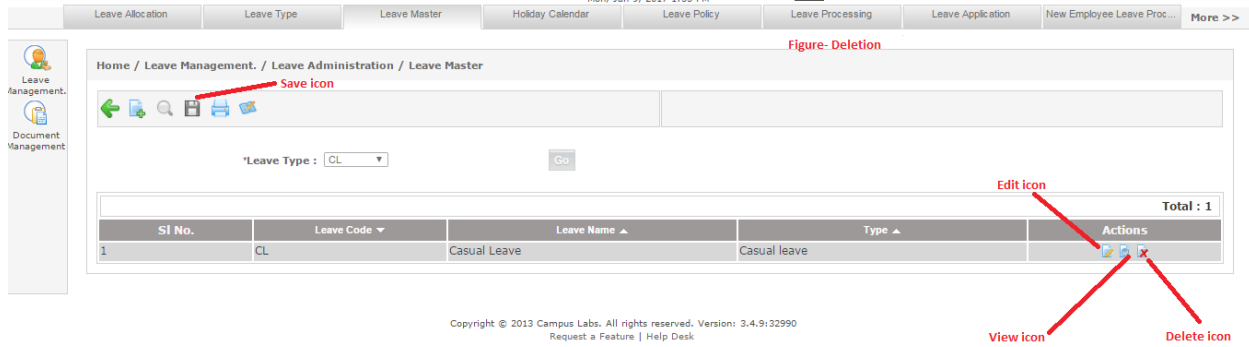
The related record will be deleted.

Creation of Master Data:-

Master data related to leave module are shown in following figure (Figure-1):

Leave Type

Admin user can create, search, edit and delete leave types using standard steps.

Leave Master

Admin user can create, search, edit and delete leave master using standard steps.

Holiday Calendar

Admin user can create, search, edit and delete holidays/events using standard steps.

Leave Policy creation

All the rules that are applicable for taking leaves are entered under this head. The rules differ from employee type and staff type. Admin user can follow these steps for creation of Leave Policy:

1. Click on "Leave Policy" tab from top menu pane.
2. Click on "Add" icon, the form for policy creation will be opened.

Figure- Leave Policy Creation(1)

Combinable Leave Types

☑	Earned Leave
☐	Half Pay Leave
☐	Restricted Holiday
☐	Maternity Leave
☐	Casual Leave
☐	Paternity Leave
☐	Vacation Leave
☐	Special Casual Leave
☑	Station Leave

☐ If the Leave is Encashable

*Max. % of Accumulated Leaves That Can be Encashed at a Stretch : 0   *Min. No. of Leaves Required For Encashment :   % = 0

*Min. Service Required for Encashment : 0   year ▼   *Min. Period(In Months) Required Between Encashments : 0

If Full Salary is Not Applicable while on Leave, Enter The Applicable Salary Formula

Formula
BP
GP
DA
DEARNESS PAY
TA
HRA
DEAN ALLOWANCE
WARDEN ALLOWANCE
CCA
MEDICAL ALLOWANCE
BHATNAGAR AWARD
DEPUTATION ALLOWANCE
INT RELIEF
OTHR ALLOWANCE

Days Upto   Expression

---

*Max. % of Accumulated Leaves That Can be Encashed at a Stretch : 0   *Min. No. of Leaves Required For Encashment :   % = 0

*Min. Service Required for Encashment : 0   year ▼   *Min. Period(In Months) Required Between Encashments : 0

If Full Salary is Not Applicable while on Leave, Enter The Applicable Salary Formula

Figure- Leave Policy Form(3)

Formula
BP
GP
DA
DEARNESS PAY
TA
HRA
DEAN ALLOWANCE
WARDEN ALLOWANCE
CCA
MEDICAL ALLOWANCE
BHATNAGAR AWARD
DEPUTATION ALLOWANCE
INT RELIEF
OTHR ALLOWANCE
ARREAR
NPA
ANNUAL ALLOWANCE
PG ALLOWANCE
DA

+ - * / % ( ) ( ) N
LastPayDrawn   back

Days Upto   Expression

☑ If the Leave is CarryForwardable

○ All Balance Leaves Carry Forwarded ● Set Maximum Leaves Carry Fowarded   *   Max Leave Accumulation Limit : 300

Cancel   Save

3. Enter the details like leave policy name, leave policy is for period from start date, end date, policy is for which employee type and staff type, how many leave of this type will be provided to employee under the duration, how many leaves an employee can take in one stretch/go, which types of leaves are combinable with this type of leave master, if the leaves are carry forwadable from which way it will be forwadable, the limit for leave forward etc.
4. Click on "Save" button.

Note: Once the policy has been created it cannot be edited during the start date and end date.

This will create the leave policy for selected leave master, for selected period with the defined rules.

Admin Transactions:-

Leave module transactions can be defined as follows:

Leave Allocation

Admin can allocate leaves to the Employees with the help of these steps:

1. Click on "Leave Allocation" tab from top menu pane.
2. Search the records using standard search steps (Figure-2).


3. Click on "Allocate Leaves".

Leaves will be allocated to all employees of selected employee type and staff type.

New Employee Leave Processing

Admin can allocate leaves to the new Employees by these steps:

1. Click on "New Employee Leave Processing" tab from top menu pane.
2. Select the employee from the dropdown.

3. All the unprocessed leaves of the selected employee will be displayed.
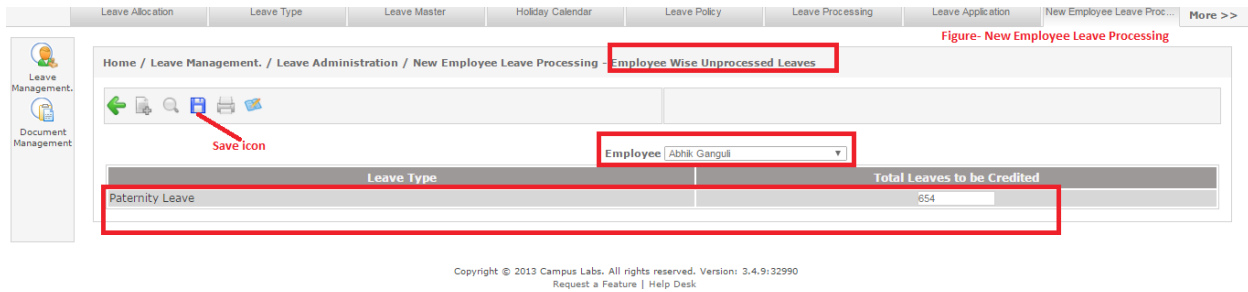
4. Enter the value.
5. Click on "Save" icon.

This will process the unprocessed leaves of particular employee.

Leave Adjustment

Admin can adjust the leaves of employees with the functionality provided under "Leave Adjustment" tab. Admin can follow these steps for leave adjustment:

1. Click on "Leave Adjustment" tab from top menu pane.
2. Search employee. Enter two characters of employee name, the list of matching employees will be displayed. Select employee from the list.
3. Click on "Go" button.
4. All the processed leaves will be displayed for editing.

Figure-Leave Adjustment

5. Select the Leave record which you want to adjust with the associated checkbox.
6. Update the values like eligible leaves, leaves taken, balance leaves etc.
7. Click on "Update" button.

The record is updated.

Leave Reports:-

Leave reports can be viewed using standard search steps.
1. Employee Leave Record Card:- This report shows the details related to the leaves for particular period for all the employees.
2. Leave Status:- This report contains the status of all leave requests made by any particular employee.
3. Leave Status Chart:- This report contains the data and balance of leaves for all the employees, which contains the details like how many EL leaves were allocated to that particular employee?, How many leaves from them the employee had taken and how many are left in his/her leave balance.
4. Employee Leave Chart:- This report shows the details of leaves for particular employee for selected time period. You can download the PDF report regarding this data.

All these functionalities are provided at Admin portal, which an Admin can use according to his/ her requirements.