



Quick Guide for Leave Administrator

Contents

- 3. Welcome Note
- 4. Configure Leave Types
- 5. Configure Working Hours
- 6. Configure Holidays
- 9. Configure Departments
- 10. Configure Leave Policies
- 11. Configure Acceptance Flow
- 12. Create Users

Welcome Note

Welcome to OnLeaf Quick Guide for Leave Administrator. In this guide, you will discover how to customize your leave policies and approval settings in just a few steps.

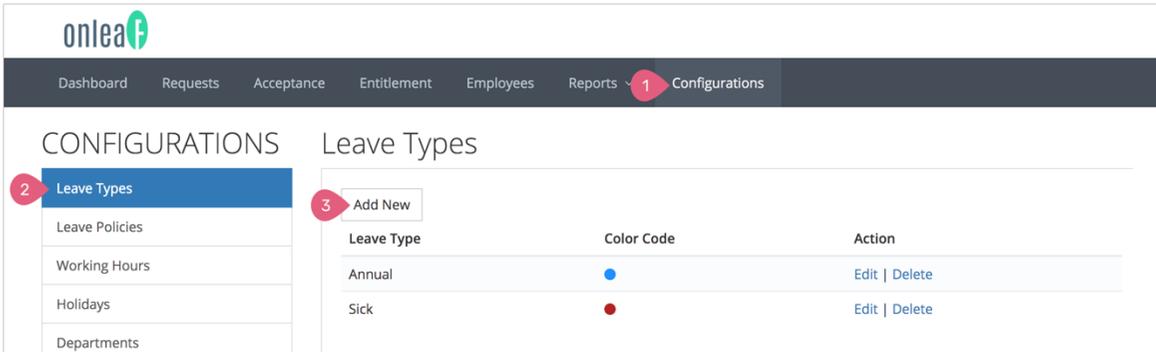
To access to OnLeaf, go to (1) BizApp -> (2) OnLeaf.

The screenshot shows the BizApp interface. At the top, there is a navigation bar with icons for Home, Email, Profile, Meeting, BizApp (marked with a red circle containing '1'), SMS, Storage, Calendar, Project, Contact, Logout, and Help. Below this, a sidebar on the left contains 'BizApp', 'Tools', and 'Links' with expand/collapse icons. The main content area is titled 'BizApp' and lists several applications:

- Quickount**: Quickount is accounting designed to simplify daily use of complicated accounting data entry all the way till the sophisticated reporting and document flows.
- onLeaf** (marked with a red circle containing '2'): Leave application and management.
- Workflow Management**: The automation of a business process, in whole or part, during which documents, information or tasks are passed from on participant to another for action, according to a set of procedural rules.
- Sales Management**: Keep track and collaboration tool amongs the sales team
- Web SMS**: Short Message Service

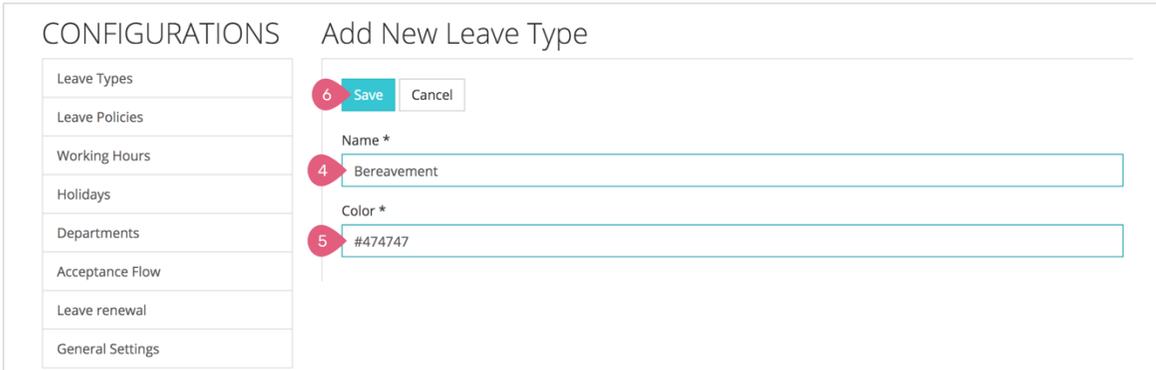
Configure Leave Types

There are two leave types pre-created in OnLeaf by default: Annual Leave and Sick Leave. You can create additional customized leave types in the **Leave Types** setting, which can then be assigned to your employees later on. In the following guide, we will create a customized leave type: Bereavement Leave.



The screenshot shows the OnLeaf Configuration page. The navigation menu includes Dashboard, Requests, Acceptance, Entitlement, Employees, Reports, and Configurations. The Configurations section is active, and the Leave Types sub-section is selected. A table lists existing leave types: Annual (blue dot) and Sick (red dot). A red circle with the number 1 points to the Configurations menu item, and a red circle with the number 2 points to the Leave Types sub-section.

Leave Type	Color Code	Action
Annual	●	Edit Delete
Sick	●	Edit Delete



The screenshot shows the 'Add New Leave Type' form. The left sidebar lists configuration options, with Leave Types selected. The form has a Name field containing 'Bereavement' and a Color field containing '#474747'. A Save button is highlighted, and a Cancel button is also visible. Red circles with numbers 4 and 5 point to the Name and Color input fields, respectively. A red circle with the number 6 points to the Save button.

Name *
Bereavement

Color *
#474747

1. Go to **Configuration**.
2. Select **Leave Types**.
3. Click **[Add New]**.
4. Key in the name for the leave.
5. Select a color code that represents this leave type.
6. Click **[Save]** to save the new leave type.

Configure Working Hours

The **Working Hours** setting is used to define the working days of your employees, so that when they apply leave on a non-working day, it won't be deducted from their leave entitlement. For example, the working days for a Kuala Lumpur-based office is Monday to Friday, while Johor offices work from Sunday to Thursday. A permanent staff may work for five days in a week; but a contract staff might not. These can all be defined in this setting.

The screenshot shows the 'Configurations' page in the onlea system. The 'Configurations' menu item is highlighted with a red circle and the number 1. In the left sidebar, 'Working Hours' is selected with a red circle and the number 2. The main content area shows a table with one entry: 'Full Time' with 'Total Working Hours' of 40. An 'Add New' button is highlighted with a red circle and the number 3.

1. Go to **Configuration**.

2. Select **Working Hours**.

3. Click **[Add New]**.

4. Enter a name for the new working hours.

5. Select the working day and its work and break time.

6. Click **[Save]** to save the new leave type.

The screenshot shows the 'Add New Working Grid' page. The 'Name' field is filled with 'Full Time - Johor Branch' and is highlighted with a red circle and the number 4. The 'Save' button is highlighted with a red circle and the number 6. The table below shows the working hours for each day of the week, with checkboxes for 'Is working day' and 'Allow break'.

Day	Is working day	Allow break	Work from	Break from	Break to	Work to	Total hours
Monday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09:00	13:00	14:00	18:00	0
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	12:00	13:00	17:00	08:00
Wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	12:00	13:00	17:00	08:00
Thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	12:00	13:00	17:00	08:00
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	12:00	13:00	17:00	08:00
Saturday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	12:00	13:00	17:00	08:00
Sunday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09:00	13:00	14:00	18:00	0

Configure Holidays

If you have multiple branches across different states or countries, which may observe and follow different set of holidays, you can add additional holiday calendars in OnLeaf, and then apply them on different employees via different leave policies. OnLeaf holiday calendar is pre-set with national holidays in Malaysia (not including individual holidays in all states).

The guide below shows an example of adding a holiday calendar for the Johor state.

CONFIGURATIONS

- Leave Types
- Leave Policies
- Working Hours
- 2** Holidays
- Departments
- Acceptance Flow
- Leave renewal
- General Settings

Holidays

3 - Calendar: Default Add New Import From System

4 - Manage

	Date	Action
New Year	2019-01-01	Edit Delete
Chinese New Year	2019-01-28	Edit Delete
Chinese New Year 2nd Day	2019-01-29	Edit Delete
Labour Day	2019-05-01	Edit Delete
Wesak Day	2019-05-10	Edit Delete
Ayong's Birthday	2019-06-03	Edit Delete

1. Go to **Configuration**.

2. Select **Holidays**.

3. Click on **Calendar: Default**.

4. Then, select **[Manage]**.

5. On Calendars, click **[Add New]**.

CONFIGURATIONS

- Leave Types
- Leave Policies
- Working Hours
- Holidays

Calendars

5 - Add New

Calendar Name	Action
Default	View Edit Delete

CONFIGURATIONS Add New Calendar

Leave Types
Leave Policies
Working Hours
Holidays
Departments
Acceptance Flow

7 Save Cancel

6 Name *
Johor Holiday 2019

Description

CONFIGURATIONS Calendars

Leave Types
Leave Policies
Working Hours
Holidays

Add New

Calendar Name	Action
Default	View Edit Delete
Johor Holiday 2019	8 View Edit Delete

CONFIGURATIONS Holidays

Leave Types
Leave Policies
Working Hours
Holidays

Calendar: Johor Holiday 2019 9 Add New Import From System 10

2019

It seems you haven't added any holidays to "Default" calendar in year 2019 yet

6. Enter a name for the new holiday calendar,

7. Click **[Save]** to create the holiday calendar.

8. Back to the calendar list, click the **[View]** icon of the newly created holiday calendar.

9. Then, click **[Add New]** to add a holiday, or

10. Click **[Import From System]** if you want to directly import the default list of holidays of a state.

Please look at the next section to see how you can add a new holiday and import list of holidays to your OnLeaf.

CONFIGURATIONS

- Leave Types
- Leave Policies
- Working Hours
- Holidays
- Departments
- Acceptance Flow

Add New Holiday

3 Save
Cancel

Name *

1 Sultan of Johor's Birthday

Date *

2 2019-03-23

Add New Holiday:

1. For adding a new holiday, enter the holiday name.
2. Select the date of the holiday.
3. Click **[Save]**.

CONFIGURATIONS

- Leave Types
- Leave Policies
- Working Hours
- Holidays
- Departments
- Acceptance Flow
- Leave renewal
- General Settings

Import holidays from system

3 Import
Cancel

Country holidays

1 Malaysia Public Holiday- Johor

Year

2019

	2 <input checked="" type="checkbox"/>	Name of Holiday	Date
<input checked="" type="checkbox"/>		Thaipusam	2019-02-09
<input checked="" type="checkbox"/>		Sultan of Johor's Birthday	2019-03-23
<input checked="" type="checkbox"/>		Awal Ramadhan	2019-05-27
<input checked="" type="checkbox"/>		Hari Hol Almarhum Sultan Iskandar	2019-10-26

Import Holiday From System:

1. For importing holidays, select a holiday list from the drop down menu.
2. Select the holidays that you wish to import.
3. Then, click **[Import]**.

Configure Departments

You can define your organization's departments in OnLeaf. By default, there are several departments pre-defined in the system. You can add more in the **Departments** section as you preferred.

The screenshot shows the OnLeaf Configuration page. The navigation bar includes Dashboard, Requests, Acceptance, Entitlement, Employees, Reports, and Configurations (highlighted with a red circle 1). The left sidebar lists CONFIGURATIONS: Leave Types, Leave Policies, Working Hours, Holidays, Departments (highlighted with a red circle 2), and Acceptance Flow. The main content area is titled 'Departments' and features an 'Add New' button (highlighted with a red circle 3) and a table of existing departments.

Name	Description	Action
Accounting & Finance	The department that provides financial record keeping of transactions involving monetary inflows and outflows and prepares financial statements.	Edit Delete
Human Resource	The department that deals with recruitment, training, health and safety and pay negotiations with employees.	Edit Delete
Production	The department that is responsible for production planning and scheduling, product quality management and inventory control.	Edit Delete

1. Go to **Configuration**.

2. Select **Departments**.

3. Click **[Add New]**.

4. Enter the department name.

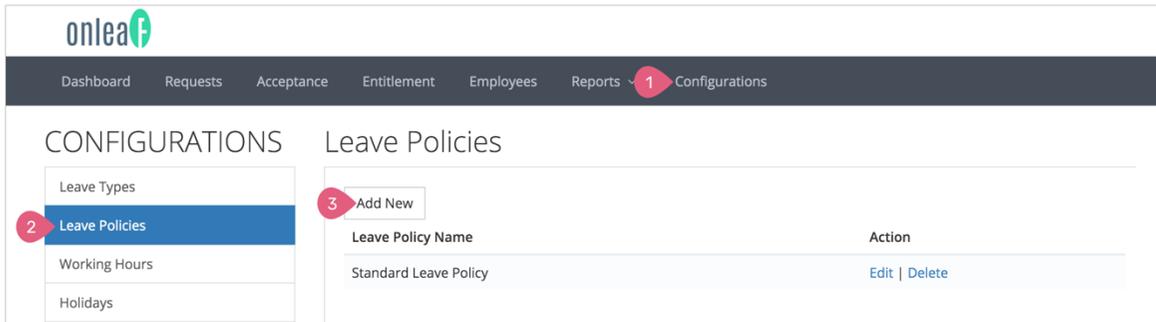
5. This is an optional step, key in the description of the department.

6. Click **[Save]**.

The screenshot shows the 'Add New Department' form. The left sidebar lists CONFIGURATIONS: Leave Types, Leave Policies, Working Hours, Holidays, Departments (highlighted with a red circle 2), Acceptance Flow, and Leave renewal. The main content area is titled 'Add New Department' and features a 'Save' button (highlighted with a red circle 6) and a 'Cancel' button. The form has two fields: 'Name *' (highlighted with a red circle 4) containing 'Administration' and 'Description' (highlighted with a red circle 5) containing 'The department performs management activities and ensures the efficient performance of all departments.'

Configure Leave Policies

Leave Policies are defined based on leave types, entitlement, working hours and holiday calendars. You can use different leave policies for different branches, different departments, or permanent/contract/senior/junior staffs. In the example below, we will create a leave policy for senior executives that have worked for more than 5 years in the company, who are entitled to more annual leave than their junior staffs.



1. Go to **Configuration**.

2. Select **Leave Policies**.

3. Click **[Add New]**.

4. Provide a name for the leave policy.

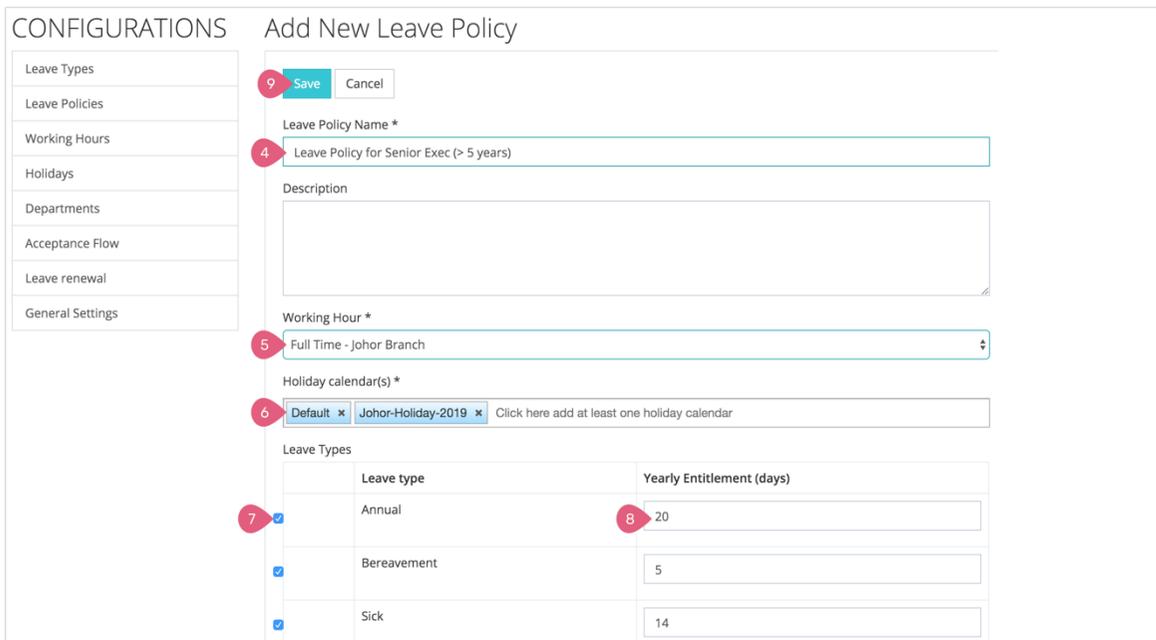
5. Select a working hour.

6. Select a holiday calendar (you can select more than one holiday calendar for this field).

7. Choose which leave types to be applied to this policy.

8. Then, enter how many days the leave is given to the employee yearly.

9. Click **[Save]** to save the leave policy.



Configure Acceptance Flow

The **Acceptance Flow** is used to define the approving officers, or managers in a certain department, who have the authority to approve or reject leave applications, at one or more levels. In this guide, we are creating an acceptance flow for Team A of Sales Department, where Alice is the Team Leader (first-level approving officer) and James is the Sales Manager (second-level approving officer).

The screenshot shows the Onlea Configuration page. The navigation menu includes Dashboard, Requests, Acceptance, Entitlement, Employees, Reports, and Configurations. The 'Configurations' menu item is highlighted with a red circle '1'. On the left, a sidebar lists various configuration categories: Leave Types, Leave Policies, Working Hours, Holidays, Departments, and Acceptance Flow. 'Acceptance Flow' is selected and highlighted with a blue bar and a red circle '2'. The main content area is titled 'Acceptance Flow' and contains an 'Add New' button with a red circle '3'. Below the button is a table with the following data:

Flow Name	Steps count	Managers count	Action
Basic Acceptance Flow	1	1	Edit Delete

The screenshot shows the 'Add New Acceptance Flow' form. The 'Acceptance flow name' field is filled with 'Acceptance Flow for Team A of Sales Department' and is marked with a red circle '4'. Below it, the 'List of approver(s)' section has a table with two rows. The first row is marked with a red circle '5' and the second with a red circle '6'. The table is as follows:

#	Approvers	Action
1	alice x Choose an employee	x
2	james x Choose an employee	x

At the top of the form, there are 'Save' and 'Cancel' buttons, with 'Save' marked with a red circle '7'. An 'Add row' button is also visible, marked with a red circle '6'.

1. Go to **Configuration**.

2. Select **Acceptance Flow**.

3. Click **[Add New]**.

4. Enter a name for the new acceptance flow.

5. Choose one or more approvers on the level of acceptance. For example, Alice is on the first level, and James is on the second level. This implies that when an employee (who is assigned with this acceptance flow) applies for a leave, Alice will be the first one to be notified and approve the leave, then only followed by James.

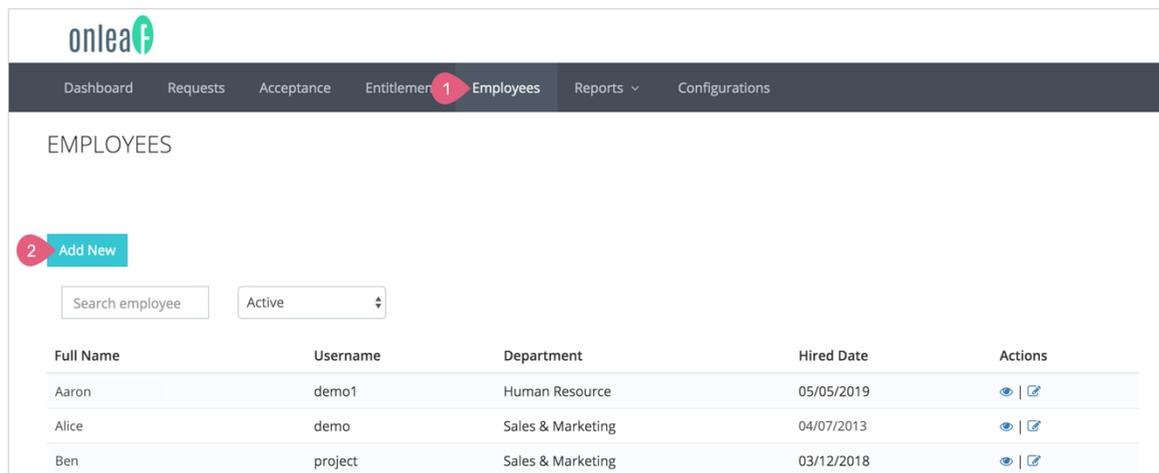
6. You can click **[Add Row]** to add more levels to the flow.

7. Click **[Save]** once you are done.

Create Users

Pre-requisite: Before you create a profile for your employee at OnLeaf, be sure to have them created in the Virtual Office's Account List. For more information, please refer to: <https://afteroffice.com/onleaf/guide/create-vo-user/>

At OnLeaf, you can manage your users in the **Employees** module. In order for your employee to start using OnLeaf, you need to create a profile for him/her in OnLeaf.



Full Name	Username	Department	Hired Date	Actions
Aaron	demo1	Human Resource	05/05/2019	👁️ 📄
Alice	demo	Sales & Marketing	04/07/2013	👁️ 📄
Ben	project	Sales & Marketing	03/12/2018	👁️ 📄

1. Go to **Employees**.

2. Click **[Add New]**.

Add Employee

8 Save
Cancel

Basic
Additional

How it Works
 To learn more about each configuration field please click : ?

3 Username *

Full name *

Email address *

Is admin?

 Allow employee to access OnLeaf as admin

Status

Employment Information

Department *

Hired date *

Job title

Employee ID

Salary

Leave Information

Leave policy *

Acceptance flow *

Remarks

3. Select the VO username of the employee.

4. Select a department for the employee.

5. Choose the hired date of the employee.

6. Select a leave policy for the employee.

7. Select an acceptance flow for the employee.

8. You can enter other details about the employee on other fields. Once done, click **[Save]** to create the employee profile.



AfterOffice.com Sdn Bhd

<https://afteroffice.com/onleaf/>

If you have any enquiries, please feel free to drop us a message at support@afteroffice.com