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Quick Guide for Leave Administrator

Contents

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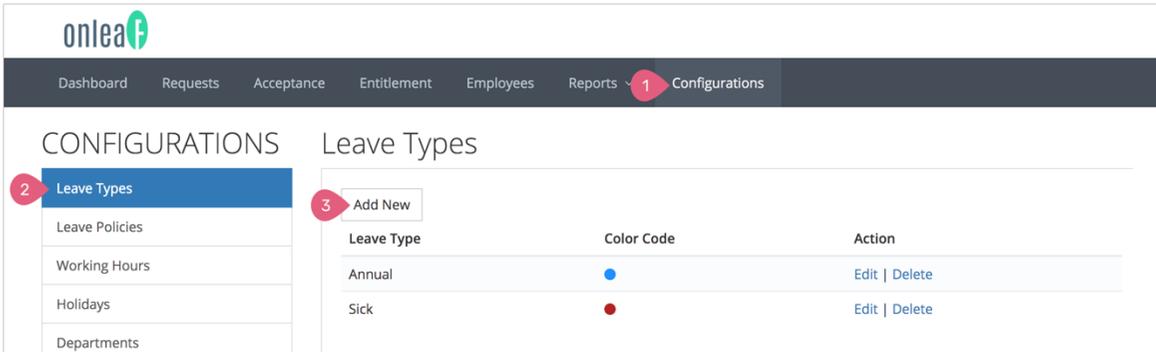
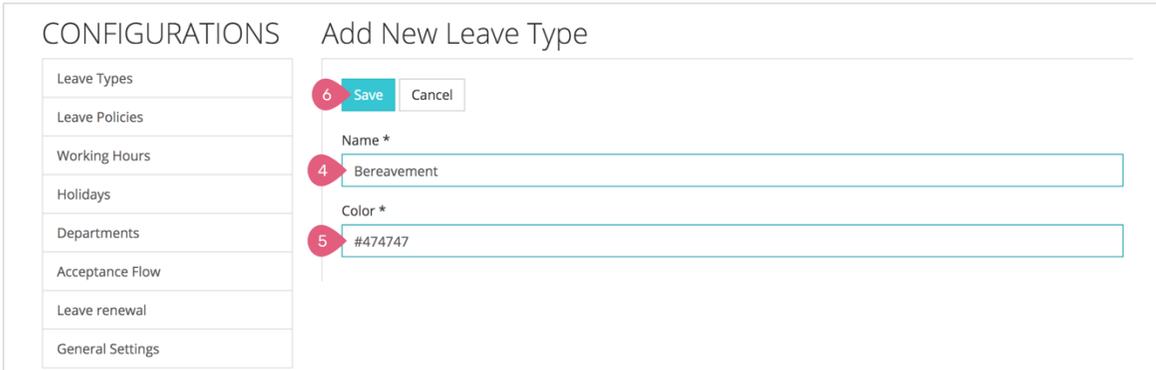To access to OnLeaf, go to (1) BizApp -> (2) OnLeaf.

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.

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.

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.

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.

1. Go to **Configuration**.

2. Select **Holidays**.

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

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

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

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 ☑	Name of Holiday	Date
☑	Thaipusam	2019-02-09
☑	Sultan of Johor's Birthday	2019-03-23
☑	Awal Ramadhan	2019-05-27
☑	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.

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]**.

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.
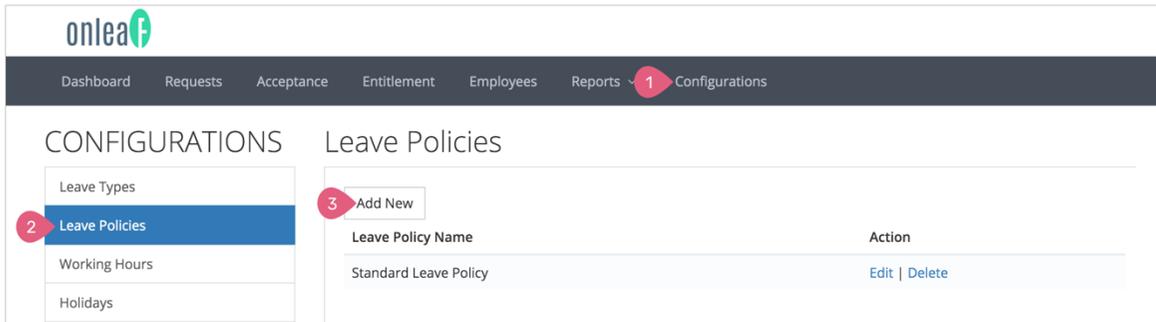
1. Go to **Configuration**.

2. Select **Leave Policies**.

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

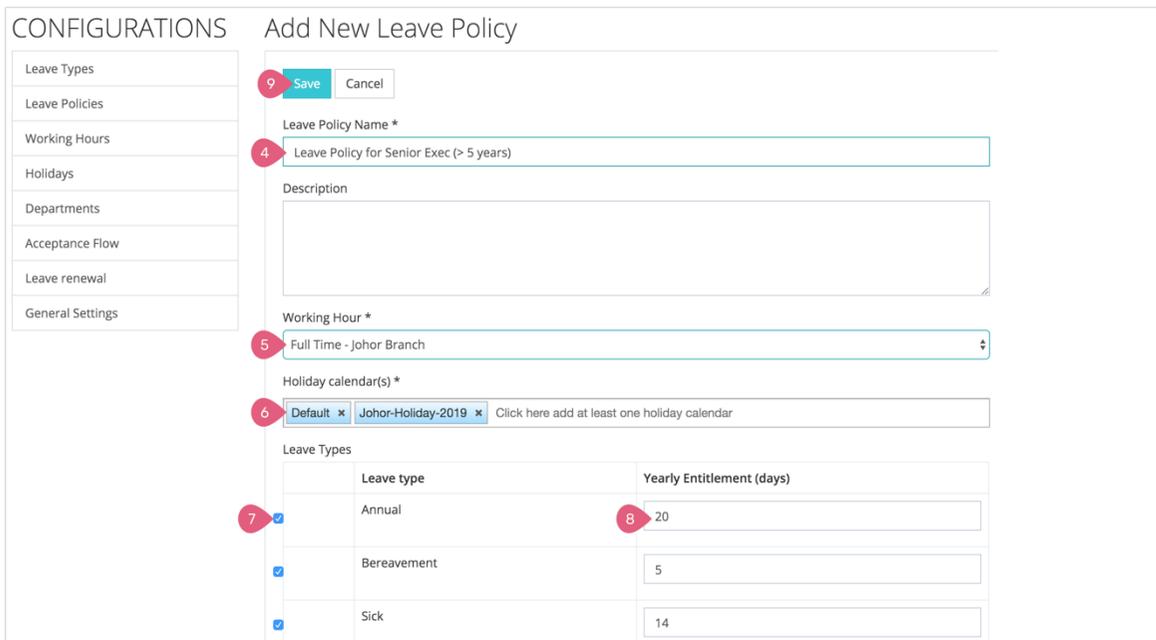4. Provide a name for the leave policy.

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).

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.
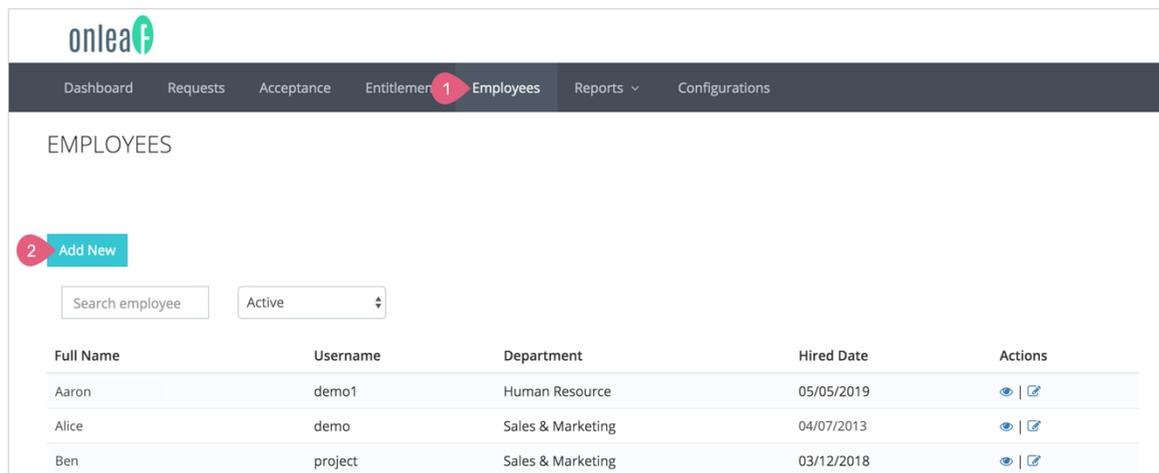
1. Go to **Employees**.

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

Add Employee

8 Save   Cancel

Basic	Additional

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

Username *
3 adam

Full name *
Adam

Email address *
adam@lookafter.com

Is admin?

☐ Allow employee to access OnLeaf as admin

Status
Active

Employment Information

Department *
4 Sales & Marketing

Hired date *
5 15.01.2013

Job title

Employee ID

Salary
MYR   year

Leave Information

Leave policy *
6 Leave Policy for Senior Exec (> 5 years)

Acceptance flow *
7 Acceptance Flow for Team A of Sales Department

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.

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