Leave Management System

Introduction

Leave Management System (LMS) Module user manual is intended as a complete guide for all employees and users whose works are related to LMS Module. This Module deals with the administrative tasks of recording leave and controlling these as per the leave policies.

A Leave Management System automates the leave request process, making it hassle-free for both the management and the employees. It seamlessly handles all the stages involved in a leave management process: application, approval/rejection, filing leaves, managing leave balance, and analysis.

This module maintains all relevant information related to the Leave Management System (LMS), including leave settings configuration,leave application and leave approval process.

All the university employees- teaching and non-teaching; permanent,contractual, or ad hoc basis are the module's audience. Each employee of the university who is eligible to take leave can request through this module.

Following are the feature of the Samarth Leave Management Module:-

- **All-in-one Dashboard**

- **Configurable Fields (Leave Type, Leave Rules)**

- **Customisable Approval Workflow**

- **Auto-Update Leave Balance**

Dashboard

In this dashboard, Admin have accessibilities of Leave Application, Commuted Leave Request, LTC Request, Overtime Request, Recommendation Request, Review Request, Sanction Request, Leave

Settings

This section contains the configuration details related to the Leave. Only the admin of the Leave module can view and access it.

For the functioning of the leave process, the admin first needs to set up the leave types, leave rules and assign the number of leaves to the employee under the settings menu. The admin can only do this. Settings have the following sections:

- Leave

- Leave Type

- Employee Leave Mapping

- Leave Account

- Leave Ledger

- Authorities

- Compensatory Leaves

- Holidays

- Import Leaves

- Special Leave Rules

- Leave Configuration

- Employee Week-off

- Add Post Facto Leave

- Custom Mail Template

- Leave PDF Template

Leave

In this field, we can define the name of the leaves.

Admin can view the details by clicking on **view** icon available in front of every entry.

Admin can add a new leave name by clicking on the **Add New Leave** button present on the top right side of the portal and fill in the required details:-

- Name

- Short Code

- Kind

- Status (Active/Inactive)

- Do you want to send sanction letter at the time of Sanction Leave? (Admin can set send sanction letter on this leave or not).

- Admin can edit/update the details by clicking on the "edit" icon available.

Leave Type

In this field, we can define and configure the leave rules of the university.

Admin can view the details by clicking on **eye** like icon available in front of every entry.

Corresponding to any leave, there can be multiple leave types for combining their cadre and gender.

> Note: All the operations in the system occur on leaves and not the leave types.

Leave type configurations are automatically fetched according to employees cadre and gender, so you don't need to create different leaves for teaching and non-teaching employees or, say, male and female employees. Just create multiple leave types for the same leave; this will make the system look tidier.

Admin can add a new leave type by clicking on the **Add New Leave** button present on the top right side of the portal and fill in the required details:-

- Name (Select from drop-down)

- Half-Day Applicable (Select from drop-down)

- Allowances (Select from drop-down)

- Paid (Select from drop-down)

- Holiday Deduction (Select from drop-down)

- Week-off Deduction (Select from drop-down)

- Applicable for PWD (Select from drop-down)

- Rejoin Required

- Document Required on Rejoin

- Status (Active/Inactive)

Can define credit rules by selecting/clicking on the **ON** button and then fill in the details like:-

- Credit leave count.

- Applicable for (Annual)

- Minimum Service Required

- Gender (Male/Female/Transgender)

- Designations (Teaching/Non-Teaching)

- Valid from (Start Date)

Can define limit rules by selecting/clicking on the **ON** button and then fill in the details like:-

- Annual Debit time.

- Maximum leaves can be taken at a time.

- Carry Forward (Yes/No)

- Maximum Accumulation Limit

Can define **combination rules** by selecting/clicking on the **ON** button and then specify the type leave it can be combined with.

- Default Sanction Authority

- Recommending Authority

- Recommending Designation

- Additional Reviewers

Can define Notification on leave performed action

- **Notification On Submit:** admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

- **Notification On Recommend:** admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

- **Notification On Review:** admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

- **Notification On Sanction:** admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

- Notification On Cancel : admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

- Notification On Rejoin : admin can set to whome notification will be sent at the time of leave submit (admin,recomend,review,sanction,user, *reporting_manager*) from given options.

Employee Leave Mapping

In this field, we can define and map leaves to the employees in the universities.

Admin can update the status by clicking on the **Update Status** button present in front of each entry. This update status is used to change the flag in employee leave mapping. The flag decides whether

Admin can map leaves to employees by clicking on the **Map Leaves to Employees** button present on the top right side of this section.

To assign leave to employees, select the employee from the given list by clicking on the checkbox. Click on the **bulk assign** button prompting you to choose the leaves assigned to the selected employees.

It shows a preview of what all leaves can be assigned to the selected employees after assigning leaves. The green Color means the leave can be assigned to the employees, and Red colour means "**You need to remove ineligible employees from the list to proceed**" as the employee is not eligible for these leaves. The reason is written for the same.

To proceed further, click on the **Remove Employee from the list** button (if any red colour details available) and click on the **Assign Leaves to eligible employees** button prompting you to be sure about assigning leaves.

Leave Account

In this field, the admin can add leaves in the employee Leave Account by clicking on the "Add Leave to employee Leave Account" button present on the top right side of the portal.

It will ask for the following details:-

- Employee

- Year

- Leave

After clicking on the submit button, it asks for the Leave counts against the particular leave type assigned to that employee.

After filling in the details, click on the "Save" button, which will give a preview of the leave account details.

Leave Ledger

employers showcase their actual monthly leave credit as per rules & leave type with utmost transparency; further, it even shows the consumption of leaves by the employees.

Click on "View application" to get a preview of the details.

Authorities

In this field, the admin can define the authority for recommending/sanctioning/ reviewing.

Admin can update the status by clicking on the **Update** button present in front of each entry, prompting you to select the status.

Admin can assign authorities by clicking on the **Assign Authority** button present on the top right side of the portal and fill in the required details:-

- Authority Type (Select from Drop Down)

- Items (Use Arrow sign to filter out the authority name under a particular authority type).

Assign Authorities to Employees

In this field,Admin can assign authorities to the employees.

Admin can assign different authorities to individual employees. That is fulfilled in this section. If authorities are not mapped from here, the employees' leaves will follow the default workflow specified in the leave type. If exclusively specified here, then employees leave will follow the workflow mentioned in this section.

To assign authorities to employees, select the employee from the given list by clicking on the checkbox. Click on the **bulk assign** button prompting you to assign authorities by filling in the following details:-

- Leaves (can select multiple leaves from dropdown)

- Recommending Authority (select from dropdown)

- Review Authority (Can select as many levels/Designation as required)

Compensatory Leaves

These Leaves are granted to an employee as compensation for working overtime; that is, it is taken as a leave(time off), working extra on a working day, weekly off and a holiday.

Holidays

In this field, all the Leave prefixes and suffixes are taken care of. Suppose, If an employee has applied for LEAVE and just before the LEAVE dates there has been a holiday, in that case, the applicant/employee will get any privilege of the week off or holidays is configuredhere.

Admin can add week off rules by clicking on the **Add Week Off** button present on the top right side of the portal and fill in the required details:

- Days (Select from Dropdown)

- Year (Select from Calendar)

Admin can add Holidays by clicking on the **Add Holidays** button present on the top right side of the portal and fill in the required details:-

- Date (Select from Calendar)

- Type (Select from Drop Down)

Admin can add Vacations by clicking on the **Add Vacation** button present on the top right side of the portal and fill in the required details:-

- From Date (Select from Calendar)

- To Date (Select from Calendar)

Import Leaves

Leave Configuration

In this section, the admin can choose the different types of leavesoptions which are applicable in the University. The leave_admin can also mention the maximum limit and maximum leaves at a time, And admin can set assigned duties are required or not (this will work for every employee) after this admin can select the designation where assigne duties are not required. adnin can select chnage assigne duties authority (recomending, sanction) from given option, admin can set send reminder email frequency in hr.(once reminder sent from admin again it can be sent after frequency manualy).

Employee Week-off

In this section **leave_admin** has the option to map the week- off for the employee.

Special Leave Rules

In this section, the admin can configure special leave rules for a particular leave. The **leave_Admin** needs to click on Add New Rule to create a Special Leave Rule.

If these special leave rules are specified for any leave, then the special leave rules will be utilised while calculating the number of leaves credited to the employee during the next credit cycle of that leave.

Add Post Facto Leave

In this section, the admin can add a Post Facto Leave on behalf of an employee who needs no further approval.

Custom Mail Template

In this section, the admin can add a new customised Mail Template for Sanction Mail, Rejoining mail, Mail to Authority.

If not specified, then the default mail templates of the system will be used.

Custom Mail Template

If not specified, pdf will not be sent in attachment.

Leave Application

This section is visible to all the employees where they can apply for the leave.

New Leave Application

Employee/applicant can add a new Leave Application by clicking on the **New Leave Application** button present on the top right side of the portal and fill in the required details:-

- Employee Name & Code (Select from drop down)

- Leave (Select from drop down)

- From Date / Time (Select from Calendar)

- To Date / Time (Select from Calendar)

- Reason

- Reporting Designation

- Reason

- Purpose (If academic)

a. University/Institution Name & Address

b. Upload Invitation

c. Teaching Assignment

d. Teaching Arrangement (If Teaching Assignment is marked as "yes")

- Amount in INR (If Finance Obligation is marked as "yes")

- Upload Supporting Document

- Current Location

- Station Leave

a. Emergency Contact Details

b. Visiting Country/State Address

- Assign Duties

- Send reminder to the approver authority

View

Applicant can view the details by clicking on **View** icon available in front of every entry.

Assign Duties

From this interface,an employee can assign his duties to other employees for the period he will be on leave. And assign duites can be change by selectd authority in his panel.

Send Reminder for Approval of Leave

Leave admin can send reminder to the approval athority and a notification well be sent to them, for this need to add a reminder mail template in mail template settings other wise common message will be in email.

Edit

Submit

Applicants can finally submit the leave application after adding/editing by clicking on the Submit button.

When a new application is created, it gets saved if not submitted. Applicants/Employee can submit it at any time. As soon as the applicant/employee submits the leave application, the final email is sent to the employee(Who made the leave request) and authorities(the authority who will take action first).

> Note: Once the Submit button is clicked, changes cannot be done.

Cancel

Applicant can request for cancellation if he/she doesn't want to take the leaves for which he has already applied before by clicking on **lock** icon.

> Note: As soon as the applicant/employee submits the leave application, an email is sent to the employee(Who made the leave request) and the authorities (the authority who will take action first) in the hierarchical order. For example, an employee request for leave, a mail will go to the employee and its recommending authority first(If applicable), then after recommendation, a mail will go to the employee and its reviewing authority (If applicable). Then the mail goes to the employee and the sanctioning authority for actual approval.

Commuted Leave Request

An employee or leave_admin (on behalf of an employee) can apply for a commuted leave here. As leave commutation is allowed only in medical cases, so the upload supporting document field is kept mandatory.

Commuted leave can only be availed if the employee has half pay leave balance in his account. For every commuted leave availed, two half pay leaves will be deducted from employees half pay leave balance upon approval.

LTC Request

LTC leaves can only be availed if the employee has earned a leave balance in his account.

Overtime Request

An employee or *leave_admin* (on behalf of an employee) can apply for overtime here. here. They need to specify the date and time with a valid reason and can submit their request.

Recommend Request

Once the applicant makes a leave request, it goes to recommending authority (if that employee is mapped to any recommended authority). The recommended authority will log in from his portal and approve/recommend the leave. The same will be done for the leave cancellation process as well. After the recommendation, the leave application goes to reviewing authority.

View

Recommending Authority can view the leave application by clicking on **View** icon available in front of every entry.

Take Action (Recommend)

Recommending Authority can recommend the leave by clicking on "Tick" icon.

Recommending authority has to fill in the following details to recommend the leave:-

- Recommend status (Select From drop-down)

- Comments

Suppose reviewing authority adds a note before reviewing the leave, then it goes to recommending authority for taking the required action.

Recommending authority can then first click on "Tick" icon and then click on the "Respond" button and fill in the details:-

- Comments status (select from drop-down).

- Forward the note (select from drop-down).

a. Forwarded To Person (if Forward the note is marked yes)

b. Action Required (if Forward the note is marked yes)

Recommending authority can forward it to the trailed authority or the employee (who requested leave) for the response.

After the recommendation, the leave application goes to reviewing authority.

> Note: if the employee is mapped with authorities in a hierarchical order, then the leave application goes in the same order, i.e. the leave application will first get recommended (if applicable), then reviewed (if applicable), and then sanctioned (if applicable). For cancellation, the last authority that has taken action on it needs to cancel that application.

Review Requests

View

Reviewing Authority can view the leave application by clicking on **View** icon available in front of every entry.

Take Action (Review)

Reviewing Authority can review the leave by clicking on **Tick** icon and fill in the following details to recommend the leave:-

- Reviewing status (Select From drop-down)

- Comments

Sanction Requests

View:

Take Action (Sanction)

Sanctioning Authority can recommend the leave by clicking on **Tick** icon and fill in the following details to recommend the leave:-

- Sanction Status (Select From dropdown)

- Comments

> Note: Any authority can see the Leave Approval Logs and Note added on that leave by clicking on the "Tick" icon. And sanction letter will be sent to employee if selected leave send sanction letter option is true and leave type notification will be sent as per notification select in leave type.

Leave Cancellation Request

If any employee wants to cancel the leave, he/she can achieve the same by applying for a leave cancellation request.

Leave Management > Leave Cancellation Request.

The cancellation request will go to the final authority that has taken action on it.

Leave Rejoin Request

If any employee rejoins after taking leave, he/she can choose the rejoin option in the leave dashboard then a request appears for approval in the dashboard of the concerned authorities.

Leave Management > Leave Rejoin Request.

The leave rejoin request will go to the reporting manager that has taken action on it and a rejoin letter will go in attachment in .

Station Leave

admin.

Leave Management > Station Leave.

Logins

There will be five types of logins and dashboard:-

- *Leave_Admin* : who can configure the setting.
- **Recommendation**: The authority will recommend the leaves and respond to the note added by the higher authority.
- **Reviewer**: authority who will review the leaves and will respond to the note added by the higher authority.
- **Employee**: who will request leave or can cancel it.
- **Sanction**: authority who will sanction the leaves.

Procedures

To be followed by *Leave_Admin*

1: Login as Leave admin to view the Leave dashboard.

2: Click on the settings section to first configure the Leave-related details.

3: Click on the **Settings** configure the holidays, leave, leave type and authority. Then configure the employee mapping with leaves and authorities, and soon.

4: To understand the process of configuring settings, go to the "Settings".

To be followed by *Employee*

1: Login as an Employee to request a leave application.

2: Go to the leave application section from the left side panel.

3: To understand how to apply for leave and go to the "Leave Application"

To be followed by *Recommending authority*

3: To understand the process of how to Recommend leave, go to the "Recommend Request".

To be followed by Reviewing authority

1: Login as Reviewing authority to review the leave of an employee.

2: Go to the **Review Requests** section from the left side panel.

3: To understand the process of how to Review the leave, go to the "Review Requests."

To be followed by Sanctioning authority

1: Login as Sanctioning authority to sanction the leave of an employee.

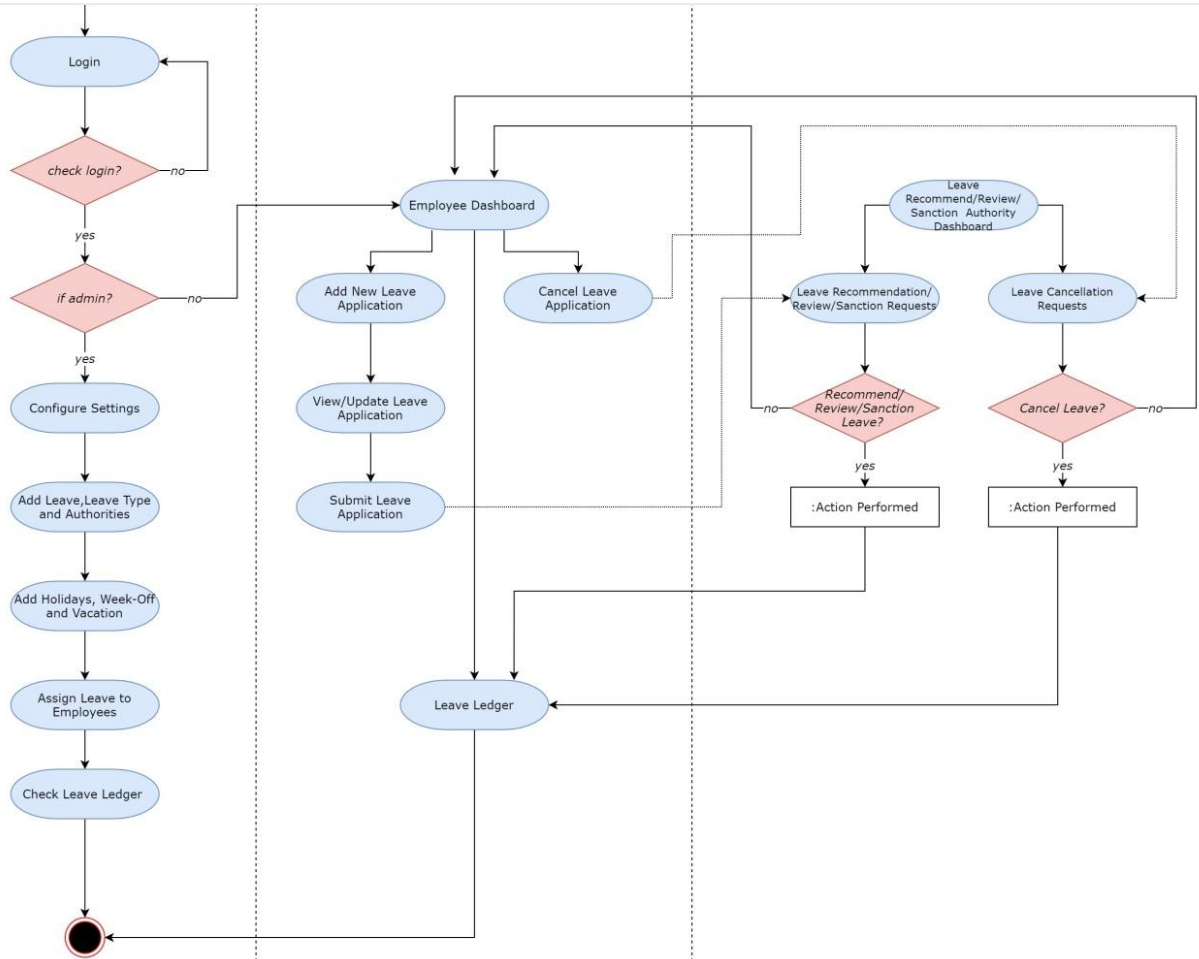2: Go to the **Sanction Requests** section from the left side panel.

3: To understand the process of how to Sanction the leave, go to the "Sanction Requests."

Annexure

Workflow Diagrams

Leave Management Activity Diagram

Activity Diagram of Leave Module

Leave Management Use Case Diagram

Add Leave and Leave Type

Add Holiday/Week-Off/Vacation

Add Authorities

Map Leave and Authorities to Employees

Update Leave Account of Employees

Add New Leave Application

Cancel Leave Application

Leave Recommendation Requests

Leave Reviewing Requests

Leave Sanctioning Requests

Leave Cancellation Requests

Employee

Leave Admin

Leave Recommending Authority

Leave Reviewing Authority

Leave Sanction Authority

Use Case Diagram of Leave Module

Module Training Video 7 | V1

Edit this page

INTRO

Getting Started

Module Breakup and Prerequisites

ACADEMICS

Academics

Alumni Portal

Evaluation & Grading

Evaluation & Grading (for evaluator)

Hostel Management

Programme Management System

Student Feedback Management

Training and Placement

ACCOUNTS & FINANCE

Bill Tracking System

Budget & Accounts

Endowment

Payroll Management System

Research Project & Management System

CUCET Administrative Portal - CUSB

CUCET User Guide for Registration 2021

DU Admission - PG

DU Admission - UG

DU Admission Backend

BASE MODULES

University Profile - Organizational Unit & Organigram

User Administration

DATA MANAGEMENT

Content Federation System System

Minutes Resolutions Archive Retrieval System

University Web Portal - Technical Document

EMPLOYEE SERVICES

Career Advancement Scheme

Employee Management - Admin

Employee Management - Non Teaching

Employee Management - Teaching

Knowledge

Leave Management System

ToT Management

GOVERNANCE

Affiliation Management

Estate Management System

File Management & Tracking System

Inventory Management System

IT Service Desk

RTI Management System

RECRUITMENT

Recruitment Management (Candidate Portal) - Non-Teaching

Recruitment Management (Candidate Portal) - Teaching

Screening Process of Non-Teaching Recruitment

Screening Process of Teaching Recruitment

Screening Process of Teaching Recruitment- University of Delhi

Recruitment Management System (Teaching) - Admin Portal

UNIVERSITY FACILITY

Core Communication System

Essential Services

Grievance Management

Health Management System

Security Management System

Sports Management System

Transport Management System