Leave Tool Manual

WorkDo Tool Guide

V.201013

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I Tools (in Do page)

WorkDo has many tools in Do page for different levels within a workplace. This means workplace, groups and buddies all have a specific Do button and a set of tools to use. See Table I-1 of tools available at each level.

Tools such as Leave, Leave Pro, Check-in, Overtime, Attendance, Expenses and Approvals are dependent on the HR tool. The HR tool is set as activated once you have created a workplace while other tools such as Payroll, Leave Pro and Attendance need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Check-In	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shifts	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	

Tool	Workplace	Group	Buddy	Dependency
Cashbook	●	●	●	
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

II Leave: Online Leave Application

One of the best things about WorkDo is that tools have default settings that may match your company policy. You can also adjust these settings. Many of the advanced tools are dependent on the HR tool. Hence once you have completed settings such as departments, work hours and employee profiles in the HR tool, the settings for other tools are easy.

Leave is a simple leave management tool that allows employees to apply leave requests and check leave records while managers can approve leave requests and track the teams' leave status. The request approval process is connected to the HR tool (see Table II-1), please use the Human Resource Manual to set up the HR tool beforehand. The leave settings are easy, you just need to set the leave unit (hourly, half-day or whole day) and edit the activated leave types.

▼ Table II-1. Leave-HR Dependencies

HR Settings	Payroll	Attendance	Check-In	Leave	Leave Pro	Overtime	Expenses	Approvals
Work Hours	x	●	x	x	●	●	x	x
Departments	x	●	●	●	●	●	●	●
Employment Types	x	x	x	x	●	●	x	x

HR Settings	Payroll	Attendance	Check-In	Leave	Leave Pro	Overtime	Expenses	Approvals
Deputy	x	x	x	●	●	x	x	x
Approver	x	x	x	x	x	x	●	●
Company Calendar	x	●	x	x	●	●	x	x
System Settings	x	●	x	x	x	x	x	x
Employee Profiles	●	●	●	●	●	●	●	●

Please note, WorkDo also provides the advanced version of Leave called Leave Pro. For the differences between the two tools, please see Table II-2 below. Leave Pro has functions such as flexible leave types (annual leave with carryover settings and bereavement leave that is manually granted), employee leave balance calculations and more.

▼ Table II-2. Leave Vs. Leave Pro

Function	Permission	Leave	Leave Pro
My leave records	All[1]	●	●
Leave overview	All	●	●
Auto exclude non-working days	All	x	●

[1]The leave records are the leave requests themselves, and depending on your tool role, different data will be made available to you. Employees may view their own records, while Managers can view their own, as well as their managing department staffs' records, and HR Staff can view all members' records.

Function	Permission	Leave	Leave Pro
View leave balance	All[2]	x	●
View leave type info	All	x	●
Deputy assignment dependency (in HR)	Manager / HR Staff	●	●
Multi-level approval	Manager	●	●
Dotted line manager approval	Manager	●	●
Leave stats export	Manager	x	●
Leave type configuration	HR Staff	●	●
Adjust leave days	HR Staff	●	x [3]
Annual leave stats export	HR Staff	●	●
Set leave base unit	HR Staff	●[4]	●
Manual grant & adjust leave balance	HR Staff	x	●
Set gender, employment type or department-specific leave types	HR Staff	x	●
Set auto-grant rule	HR Staff	x	●
Set carryover rules	HR Staff	x	●
Set applicable leave times	HR Staff	x	●

[2]The leave balance shows how many leave days remain for employees, and this feature is available to Managers in the web version of WorkDo.

[3]The leave days can be adjusted in Leave, while for Leave Pro, only the balances can be adjusted.

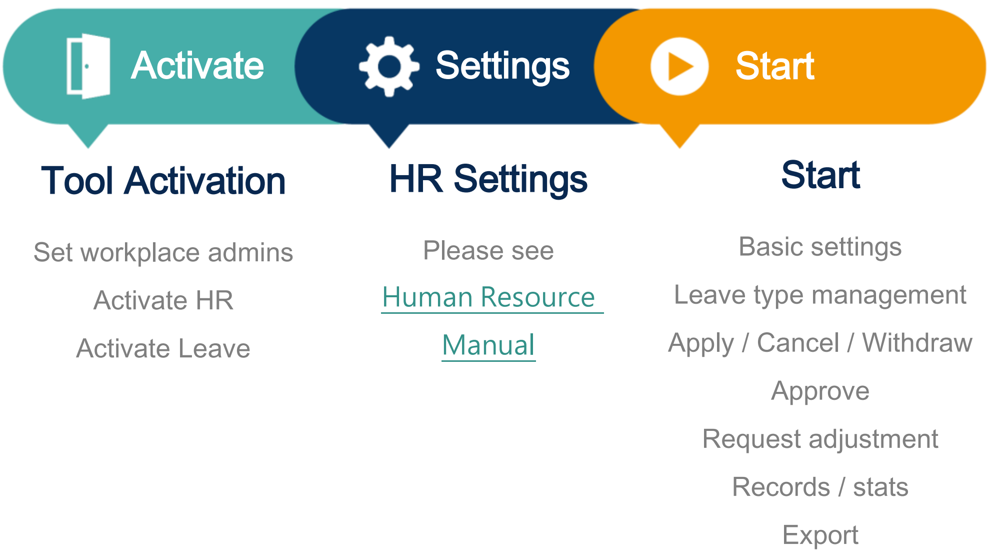
[4]Half-hour leaves can be requested in the hourly leave base unit setting.

Function	Permission	Leave	Leave Pro
Apply for leave requests on behalf of employees	HR Staff	x	●
Absence records and post-application reminder notification	HR Staff	x	●
Annual leave balance export	HR Staff	x	●
Remaining leave balance Report	HR Staff	x	●

III Set Up

In this section, we will guide you on how to use the Leave tool. The web interface is more comprehensive over the app interface, but you can choose your preferred device to set up Leave. This guide will only be focused on the web interface.

The process includes 3 stages: tool activation, HR settings and start as shown below. The request approval process and deputies depend the HR tool hence please see the Human Resource Manual for the HR tool settings.



▲ Image III-1. Setup Process

Each step of setting up requires you to prepare different data. Please follow Table III-1 to prepare these data before setting up Leave.

▼ Table III-1. Requirement

Procedure	Requirement	Note
Tool Activation **Set Tool Roles**	✓ Activate the HR tool ✓ Set tool admins	✓ By workplace admins[5].
Setup	✓ Set configurations ✓ Activate leave types	✓ By HR Staff of Leave[6].

STEP 1. Tool Activation

To ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins (Table Step 1-1).

Workplace admins include an owner and multiple admins that can adjust workplace settings and are usually management and IT employees. Tool Admins manage the data others see per tool. Tool activation is done by workplace admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x

5 Please see STEP 1 Tool Activation for admin authorities.

6 Please see STEP 1-b Set Up Tool Roles for tool admin authorities.

Authority	Workplace Owner	Workplace Admin	Tool Admin
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Ask the workplace admins to go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin, the red crown marks the owner and the blue crown marks the admin.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only menus.

b. Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are three types of roles in Leave: No Role, Employee and HR Staff. Once Leave is activated, the new members will automatically be assigned the Employee role. Furthermore, no matter what role you are, if you are assigned as a Manager or Dotted Line Manager with the HR tool (Step 2-b), you have the authority to sign off on employees' leave requests.

As mentioned above, Leave is dependent on the HR tool, hence, please activate the HR tool first. Once you enter Tool Box and click the Manage button of Leave, please use the steps below to manage tool roles.

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box to find the Advanced tab is available for you to activate, deactivate and manage tools.
4. Make sure Leave is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar to quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2． Start

Leave allows employees to apply for leaves and check their leave records while managers can approve requests and track the teams' leave status. The request process is linked to the HR tool (see Table II-1), please set up the HR tool with the Human Resource Manual first.

Leave settings are easy to configure, you just need to set leave unit (hourly, half-day or whole day) and edit activated leave types and you are good to go!

a. Configuration

The HR Staff could follow the steps below to configure leave settings and select the minimum leave unit (Hourly, Half-day and Whole Day). Please note that half-hour leaves are supported when selecting the hourly basis unit.

Configuration

1. Click workplace > Do > Leave (HR Staff role member only).
2. Management > Configuration.
3. Click Edit (* Must be filled).
    - Leave Unit: Set the minimum leave unit when employees request leaves.
    - Hide Sensitive Data: Only the Leave date will be displayed in the Leave Overview when selecting "Yes", else, the date, Leave Typ and remark will all be shown in the Leave Overview.
4. Click Save to finish.

b. Leave Type

You can edit existing leave types by changing the name or deactivate it.

Leave Type Management

1. Ask HR Staff of Leave to go to Workplace > Do > Leave.
2. Management > Leave Type.
3. Click the edit button.
4. Fill out the fields.
   - Leave Type Name
   - Status: Activate or inactivate the leave.
   - Leave Unit: Select the applicable minimum leave unit for this particular leave type.
5. Click Save to finish.

c. Apply

Use the Leave tool to apply for leaves anytime, anywhere!

Leave Application

1. Workplace > Do > Leave > My Leaves will list all your available leaves.
2. Click +Apply and fill out the fields (* Must be filled)
   - Leave Type: Select your leave type.
   - Leave Time: Fill out your leave time.
   - Days / Hours Applied: The system automatically calcualtes the actual leave time in hours, but you can change it if it is wrong.
   - Photos / Files: Attach relavent photos for files for approval if necessary.
   - Remark: Leave a comment if necessary.
3. Click Submit to apply leave and the approver will be notified of your leave application.

Please note that your leave hours will be deducted according to the Days / Hours Applied field (The weekends and national holidays are excluded). But you can still manually adjust it when there is an exception.
If you need to change anything after the leave has been applied, you could

- Cancel / Withdraw
- Ask the manager to reject it
- Ask the HR Staff to change it

d. Cancel / Withdraw

When a leave request has not been approved, the applicant could cancel it. If it has been approved, then the applicant could withdraw it, but the manager will have to approve the withdrawal. The deducted leave hours will be reversed when either action has been successful executed.

Cancel / Withdraw

1. Workplace > Do > Leave > My Leaves.
2. Click a leave request for either action.
3. Cancel: For unapproved leave request and the status is Submitted. Click Cancel and fill out the reason for the cancellation then click Confirm to complete.
4. Withdraw: For approved leave request and the status is Approved. Click Withdraw and fill out the reason for the withdrawal then click Confirm to complete. The manager will be notified for the withdrawal.

e. Approve

The department managers or dotted line managers are responsible for approving employee leave requests. Follow the steps below to sign-off on leave requests.

Approve

1. View leave details via one of the methods below.
   - Notification center
   - Dashboard: Workplace > Dashboard > Workflow
   - Leave tool: Workplace > Do > Leave > Approve
2. Select a leave request.
   - Single approve: Enter the leave detail page.
   - Batch-approve: Use the check boxes to select multiple leave requests.
3. Select the appropriate action (Approve, Reject, Escalate) and leave a comment if needed (Only available for single approve).

f. Progress Check / Records

Based on STEP 1-b Set Up Tool Roles the available options will be slightly different depending on your role. While the user interface remains the same, Managers will have the option to check past records as seen in the table below.

Leave requests can be signed off according to the Organizational Structure or a Designated Approver, once sent, the manager will be notified, you on the other hand, can track the approval progress. The managers could also use the function to check the leave requests they signed off on.

▼ Table STEP 2-f. Leave Authorities

Option	Difference	Member	Manager	HR Staff	HR Staff Manager
My Leaves	Self-applied	●	●	●	●
Approve	Self-handled	●	●	●	●

Progress Check / Records

1. Workplace > Do > Leave.
2. Select an option as listed in Table STEP 2-f.
3. Use the filters and search options.
4. Click on the record to view its details.

g. Communicate Details

There is a comment section where you could use to relay additional information when sending a leave request; this is the perfect two way communication between the applicant and the approver.

Communicate Details

1. Select a leave request.
   - Applicant: See Step-2-c-1.
   - Approver: See Step-2-e-1.
   - HR Staff: See Step 2-l-1.
2. Click to view the request details.
3. Leave a comment in the comment section or upload attachments.

h. Adjustment

The Adjustment function is only for the rare situations when the HR Staff wants to change the leave time of a leave request. This function is only accessible for members with the HR Staff tool role.

Leave Adjustment

1. Click Workplace > Do > Leave > Management > Adjustment.
2. Select an employee to view their leave records.
3. Click the edit icon or click the leave record then click the Edit button.
4. Change the hours applied then Save.

Although the HR Staff is able to change the leave time applied, we still recommend that you follow the normal protocol of having the employee cancel / withdraw a leave request and reapply it whenever there is a clerical error to preserve the data integrity.

i. Request Print Out

Leave requests can be exported for print by the applicants and the approvers, however, it is recommended that you only keep the records that have been signed off on (either approved or rejected).

Request Print Out

1. Click on a leave record.
   - Applicant: See Step-2-c-1.
   - Approver: See Step-2-e-1 (Lists only requests that are pending approvals).
2. It is recommended that you print out an approval when it has been signed, either approved or rejected.
3. Click Export PDF Report (Available to the applicant and the approver).
4. A PDF format of the leave request can now be saved and printed.

j. Overview

The leave overview provides a calendar view of the upcoming leaves applied by other employees so everyone can better manage their tasks and efforts ahead of time.

Who is on Leave?

1. Workplace > Do > Leave > Overview
2. The employees on leave of that day will be displayed.
   - Date range can be toggled for month, week or day.
   - Use the arrow keys to go forward or backward in time.

General Overview Rules

- Employee: The leave overview displays all approved leaves and leaves that are marked Urgent of that day.
- HR Staff: The leave overview displays all leaves approved and applied.
- If Hide Sensitive Data is set in the configuration, the leave details can' t be viewed by every member, and vice versa.

k. Leave Days

Checking the leave days are available to Members and HR Staff to view their leave records, each with its respective functions.

▼ Table STEP 2-k. Leave Days Authorities

Option	Difference	Member	Manager	HR Staff	HR Staff Manager
My Leave Days	Self-applied	●	●	●	●
Workplace Leave Days	All members applied	x	x	●	●

View Leave Days

1. Workplace > Do > Leave
2. Select options listed in Table STEP 2-k.
3. My Leave Days
   - Toggle between This Year and Last Year tabs.
   - Leave records are displayed. Click to view details.
4. Workplace Leave Days lists various leave records based on leave types. Click to view leave details.

I. Leave Summary

Available only to HR Staff using the web version of WorkDo, Leave Summary is a comprehensive leave report with filters that users can use to quickly export customized leave reports.

Report Export

1. Workplace > Do > Leave> Report > Leave Summary
2. Use the filters to search the records for export.
3. Format select
   - Export CSV: Download the Excel format.
   - Export PDF: Download the PDF format for print.