



Leave Pro Tool Manual

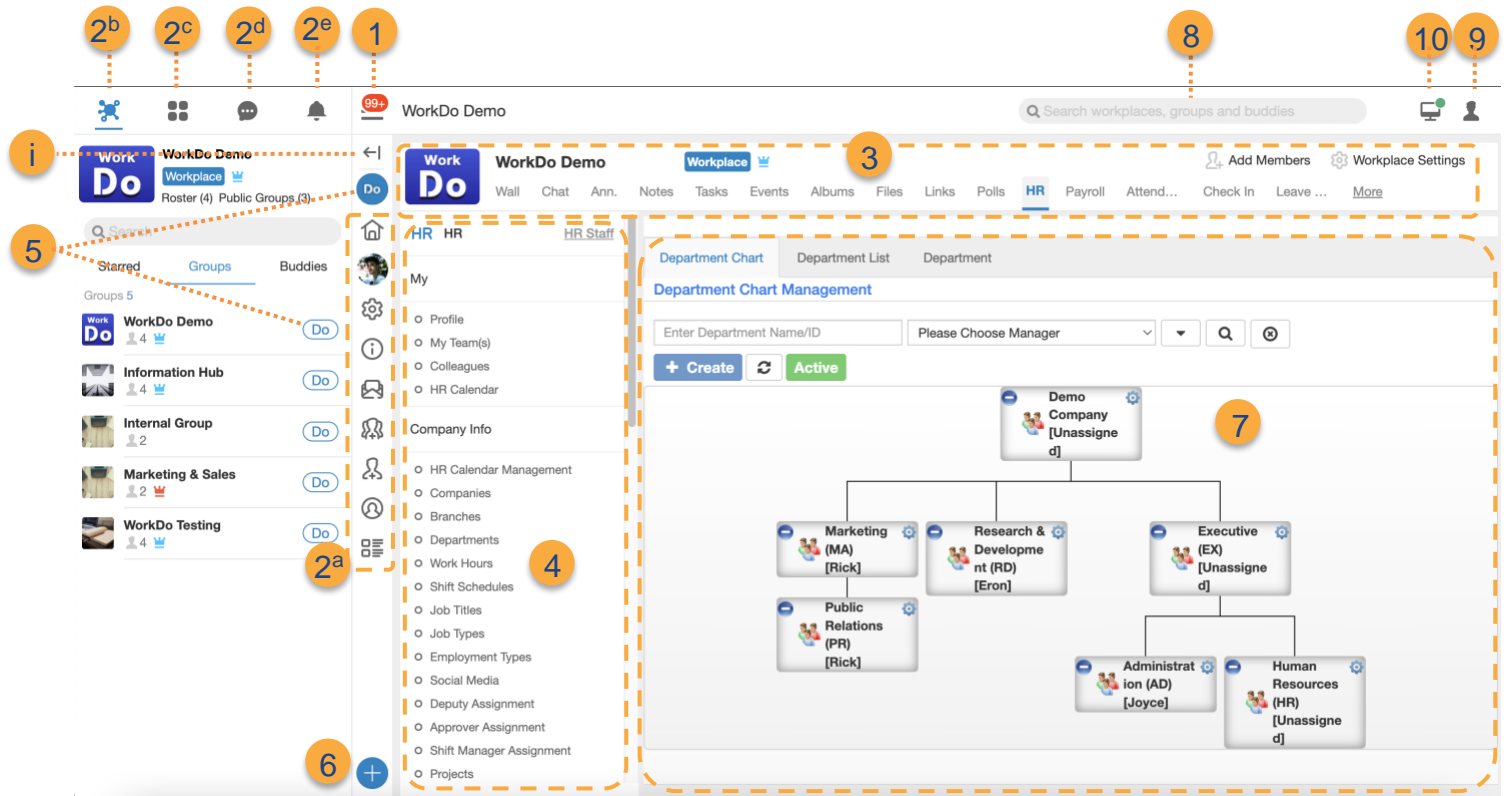
WorkDo Tool Guide

Table of Contents

I	Page Navigation.....	1
II	Advanced Tools	3
III	Automated Leave System	4
IV	Set Up.....	7
STEP 1.	Tool Activation	8
	a. Assign Workplace Admins.....	9
	b. Tool Box.....	10
	c. Set Up Tool Roles	11
STEP 2.	Leave Pro Set Up	13
	a. General Settings.....	13
	b. Leave Types	19
	c. Adjust Current Leave Balance	21
	d. Employment Anniversary Date Auto Grant.....	22
	e. Absence Reminder	23
STEP 3.	Start.....	24
	Addendum 1 : Leave Type Examples	25
	Addendum 2 : Leave Calculation	31

Page Navigation

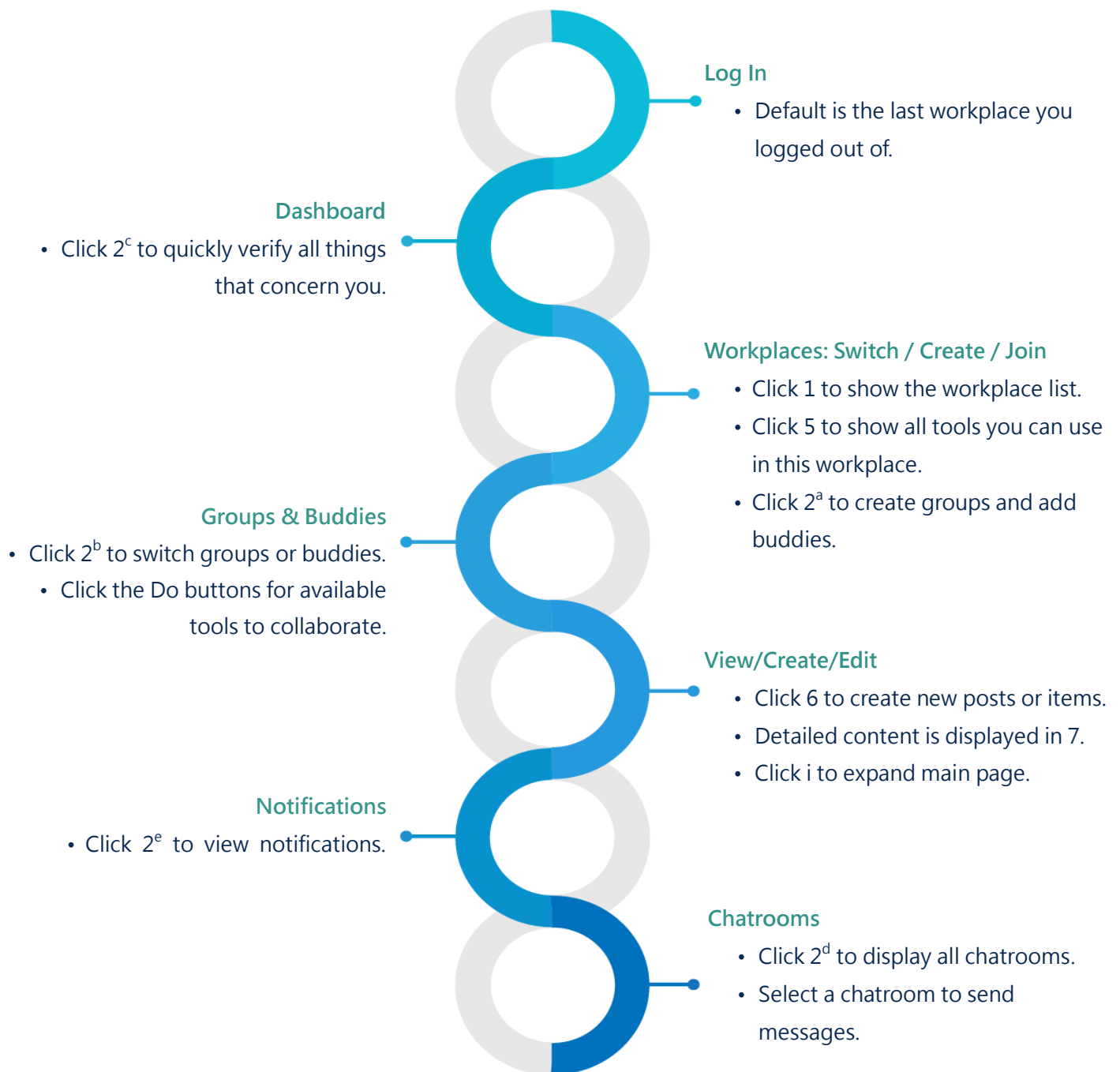
Welcome to WorkDo! This document will guide you through the steps in setting up the Attendance tool using the web interface. We will begin with the basic page navigation!



- i** Expand/Close Expand or close general navigation areas, a button panel will appear when the navigation area is closed.
- 1** Workplaces Switch between workplaces/My Upcoming/My Shelf and Join/Create Workplaces.
- 2** Main Menu
 - a. Workplace Settings: The main workplace functions.
 - b. Group/Buddy list: Your list of groups and buddies.
 - c. Dashboard: Your personalized shortcuts.
 - d. Chatrooms: All the chatrooms you are in.
 - e. Notifications: All notifications related to you.
- 3** Level Options The tools, functions, and options are available with respect to your level and your [role](#).
- 4** Sub-Menu Displays 2, 3, and 5 functions respectively.
- 5** Do Button All the tools you can use in the workplace.

- | | | |
|----|---------------|---|
| 6 | Create Button | Create new items. |
| 7 | Main Page | The main working area, it displays contents from 1-6. |
| 8 | Search Bar | Use the search bar for keyword search. |
| 9 | My Settings | User' s personal settings such as preferences, account management and password. |
| 10 | Connection | Your connection status. |

Check Image I-1 to quickly start navigating WorkDo!



▲ Image I-1. Quick Start



Advanced Tools

WorkDo has many tools for different levels within a workplace; this means workplaces, groups, and buddies all have a specific Do button and a set of tools to use. Please see Table II-1 for available tools at each level.

Advanced tools such as Leave Pro, Attendance, Expenses, Leave, and Approvals depend on the HR tool. The HR tool is activated once you have created a workplace. Then you need to manually enable the advanced tool based on your company's needs, which means the HR tool needs to stay activated for the other advanced tools to function correctly.

▼ Table II-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
Shift	●	x	x	HR required for clock in/out
Overtime	●	x	x	HR
Timesheet	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	

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

Automated Leave System

The Leave Pro tool is a simple leave management tool for employees to apply for leave, managers to approve them, and the HR Staff to keep the leave records. The purpose of Leave Pro is to simplify HR's operational workflow and automatically grant leave days based on the set rules, including carryover leave calculations and leave balance.

Leave Pro provides flexible leave-granting settings to accommodate different leave policies of most companies; integrated with the Payroll tool, it further simplifies the payroll calculation process for the HR department.

The request approval process is connected to the HR tool, so please use the [HR Tool Manual](#) to set up the HR tool beforehand.

For differences between Leave and Leave Pro, please see Table III-2 below.

▼ Table III-1. Leave Pro-HR Dependencies

HR Setting	Dependency (* Must set)
*System Settings	Sets the leave approval escalation rule.
*Work Hours	Set the fixed work hours to calculate employee attendance.
*Departments	Department structure and hierarchy decide how approvals are processed.
*Employment Types	Affect what leave types employees are entitled to.
*HR Calendar Management	Set workdays and holidays to calculate employee

HR Setting	Dependency (* Must set)
	attendance.
*Employee Profiles	Work Hours, Employment Types and Deputy Assignment can all be set in the Employee Profiles. Employees' hire dates can also affect certain leave types that are doled out based on seniority.
Deputy Assignment	Designate up to two persons to be the deputies when the employee takes a leave. It is possible to deny leave applications when deputies are on leave at the same time.

Master the Leave Pro tool, and you will soon realize that its flexible settings can satisfy almost all corporate leave rules.

▼ Table III-2. Leave Vs. Leave Pro

Function	Authority	Leave	Leave Pro
My leave records	All ^[1]	●	●
Leave overview	All	●	●
Auto exclude non-working days	All	x	●
View leave balance	All ^[2]	x	●
View leave type information	All	x	●
Check deputy status	Manager, HR Staff	●	●
Multi-level approval	Manager	●	●
Dotted-line manager approval	Manager	●	●

¹ Depending on your tool role, different data will be made available to you. Employees may view their own records, while Managers can view records of everyone in their managing departments, and HR Staff can view all members' records.

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.

Function	Authority	Leave	Leave Pro
Leave stats export	Manager	x	●
Leave type configuration	HR Staff	●	●
Set minimum leave length	HR Staff	● ^[3]	●
Adjust leave request lengths	HR Staff	●	x ^[4]
Annual employee leave stats report	HR Staff	●	●
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 time	HR Staff	x	●
Apply/Cancel/Withdraw leave on behalf of employees	HR Staff	x	●
Set absent reminder and post-application reminder notification frequency	HR Staff	x	●
Employee leave balance report	HR Staff	x	●
Employee leave balance report (Before grant)	HR Staff	x	●
Leave statistics report	HR Staff	x	●
Payroll tool integration ^[5]	HR Staff	x	●

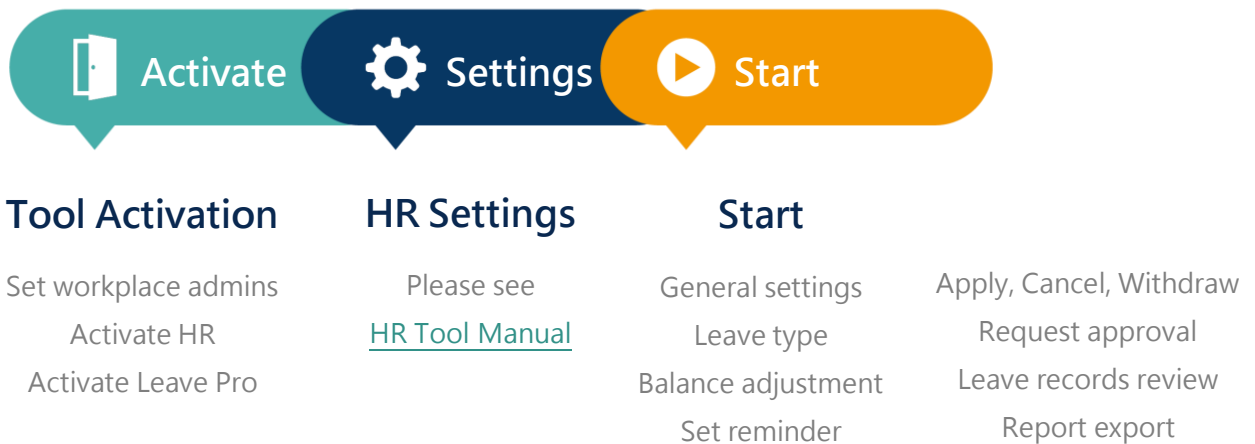
³ Half-hour leave are allowed in the hourly leave base unit setting.

⁴ For Leave, the leave request duration can be adjusted, while for Leave Pro, only the balances can be adjusted.

⁵ The Payroll integration will deduct pays when employees take unpaid leave.

IV Set Up

This section will guide you on how to use the Leave Pro tool; the process includes three stages. The request approval process and deputies depend on the HR tool. Hence please see the [HR Tool Manual](#) for the HR tool settings.



▲ Image IV-1. Setup Process

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

▼ Table IV-1. Required Data

Procedure	Requirement		Note
Tool Activation	✓	Activate the HR tool	✓ By workplace admins
Set Tool Roles	✓	Set tool admins	
Tool Setup	✓	Complete the HR tool settings	✓ By HR Staff
Leave Pro Setup	✓	Set leave types and rules	✓ By HR Staff
	✓	Set leave quotas	

STEP 1 .Tool Activation

WorkDo has two types of admins that help your workplace manage and control information access, they are Workplace admins and tool admins, as seen in Table Step 1-1.

Workplace admins include an owner and multiple admins that can adjust workplace settings. Normally, the workplace admins are management or IT employees. The tool admins control the data others see per tool. Different tools can have different members as the tool admins. The tool activation is done by the workplace admins.

▼ Table Step 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Transfer workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●
Maintain tool records and reports	x	x	●

STEP

1

a

b

c

2

a

b

c

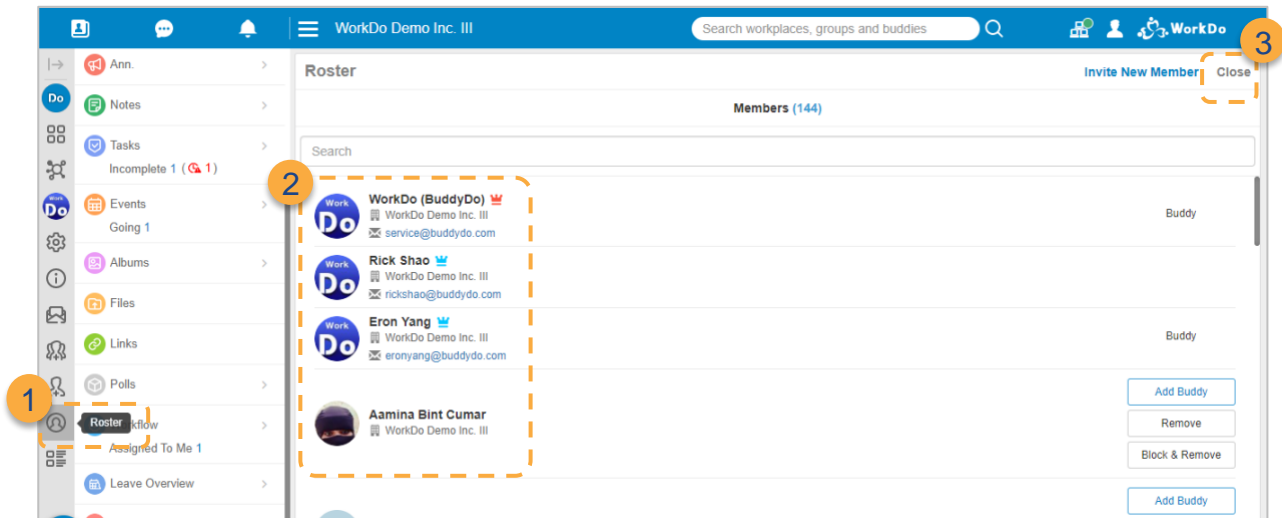
d

e



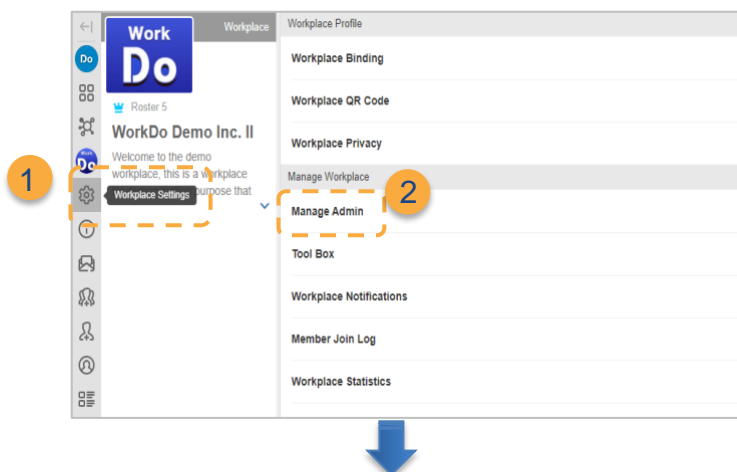
a.Assign Workplace Admins

Based on the [Page Navigation](#), you can verify your workplace admin status by following the steps below.

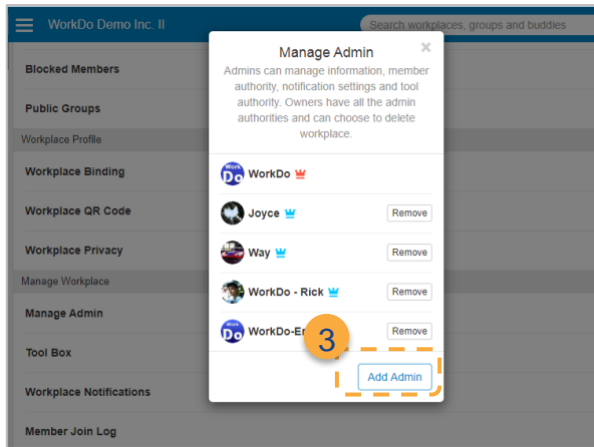


- 1 Click on the Roster to view all workplace members.
- 2 The Workplace Owner is marked with a red crown while the workplace admins are marked with a blue crown.
- 3 Click Close to return to the Dashboard Wall.

According to [Table Step 1- 1](#), workplace admins are an integral role to maintain all the settings in the workplace. You will need to ask the owner or another admin to assign you the [workplace admin](#) role if need be.



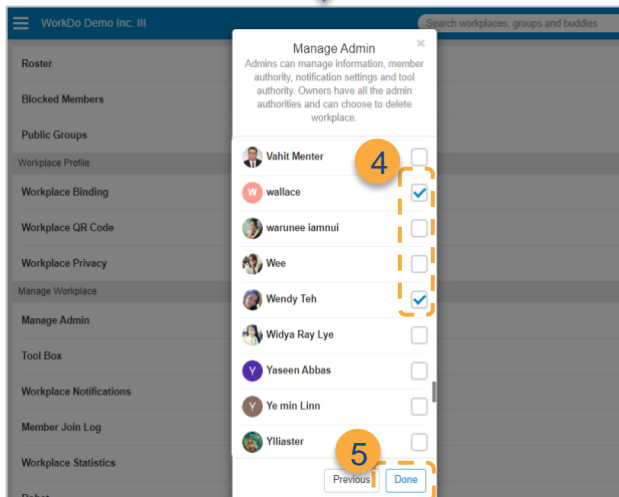
- 1 ► Click the gear icon for Workplace Settings.
- 2 ► Manage Admin.



Red crown = Owner.

Blue crown = admin.

3 ▶ Add Admin.



4 ▶ Member select.

5 ▶ Click Done to finish.

6 ▶ New admins will see the new options available once they refresh the browser.

STEP

1

a

b

c

2

a

b

c

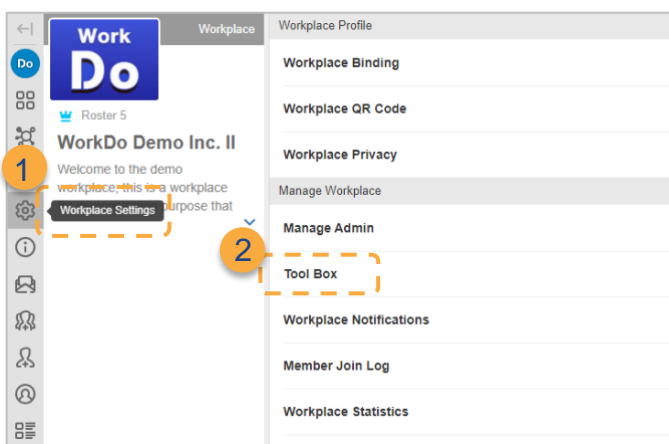
d

e

✓

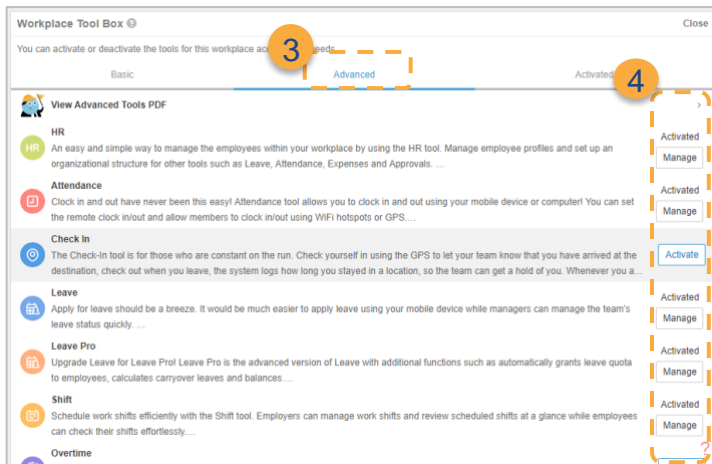
b.Tool Box

Congrats on becoming an admin, you can now go to Tool Box in workplace settings to activate or manage tools and to manage members' tool roles, simply follow the steps below.



1 ▶ Click the gear icon for Workplace Settings.

2 ▶ Click Tool Box.



Default is set to the Activated tool page.

3 ► Click Advanced to enable or disable tools.

4 ► Click Manage to begin assigning roles.

STEP

1

a

b

c

2

a

b

c

d

e

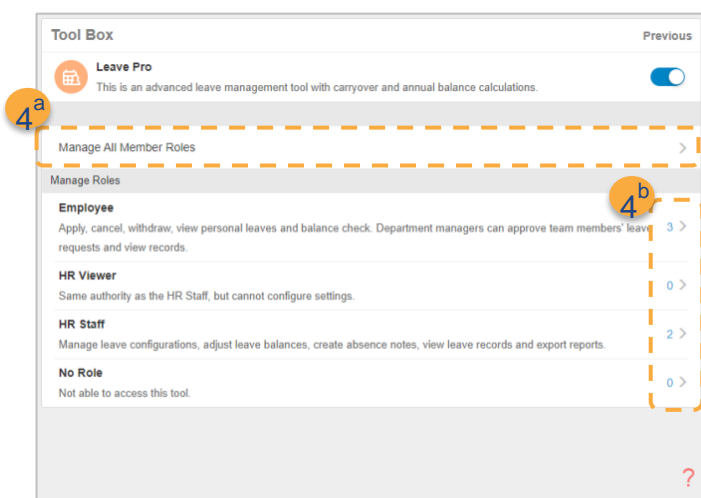
✓

c.Set Up Tool Roles

To safeguard sensitive workplace information, many of WorkDo's tools require some members to take on administrator roles to limit access. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

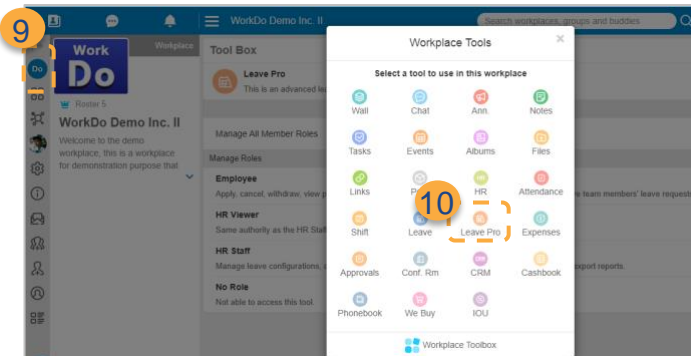
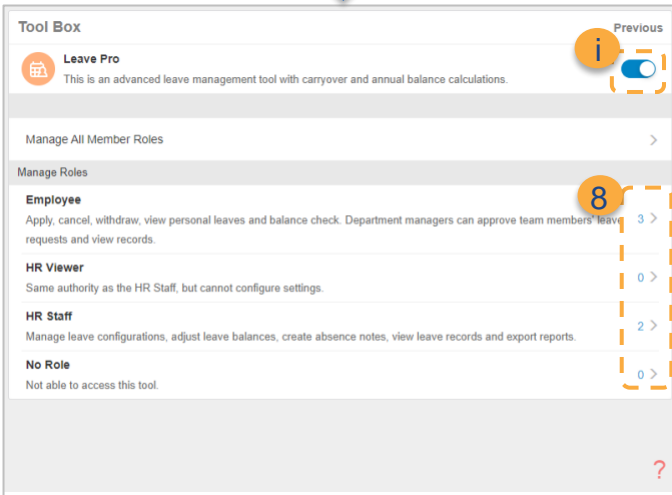
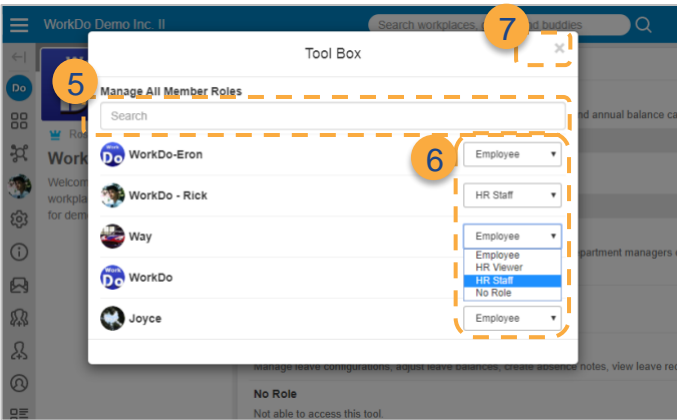
There are three types of roles in Leave Pro: No Role, Employee, and HR Staff. Once Leave is activated, the new members will automatically be assigned the Employee role.

Furthermore, no matter what role you are in, 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 Pro is dependent on the HR tool, hence, please activate the HR tool first.



Following step 3, click Manage button to see tool and role info.

4 ► Change tool roles.
a. Click Manage All Member Roles.
b. Click Employee.



- 5 ▶ Enter member display name in the search bar.
- 6 ▶ Choose a role in the drop down menu.
- 7 ▶ Press X to close the window.
- 8 ▶ Confirm member count is correct, click to for list view.
- i ▶ The blue switch means the tool is activated; toggle the button to deactivate (grey).
- 9 ▶ Click the Do button to open up the workplace tool box.
- 10 ▶ Click Leave Pro.

STEP

1

a

b

c

2

a

b

c

d

e

✓

STEP 2 .Leave Pro Set Up

Congrats on being an HR Staff of Leave Pro! Leave Pro’ s flexibility in providing different types of leave grants based on tenure, seniority, or accommodating different labor laws. Before we begin Step 2, a reminder that you need to set up the HR tool first for Leave Pro to take effect. Please follow the [HR Tool Manual](#) instructions to set up the HR tool.

STEP

- 1
- a
- b
- c
- 2
- a
- b
- c
- d
- e
- ✓

a.General Settings

Tool Role

☐ Employee

☐ Manager

☒ HR Staff

☒ HR Viewer

Interface

☒ Web

☐ App

Data Integration

☒ HR tool setup

➔

Overtime: If the Overtime tool is enabled, the Compensatory Leave will be automatically added as one of the leave types. For employees who had worked overtime and chose compensatory leave as their compensation, their overtime hours will be added to the compensatory leave.

➔

Payroll: You can input equations to calculate unused leave to payment if the Payroll tool is enabled.

Key Settings

The semi-automatic system will automatically dole out appropriate leave time to each employee at a specified time per the rules you set to save your valuable time.

In the table below, default values in the fields with the ★ sign are automatically filled, but you can still adjust them as desired.

Field	Description	Note
Basic Settings		Tab
★Leave Unit	The minimum leave unit for leave application.	

Field	Description	Note
Display Format	The leave time display format. Day of the Week HH:MM or HH:MM	
★Advance Notice (General)	<p>Advance notice for leave applications.</p> <ul style="list-style-type: none"> ● 0: Advance notice is not required. All applications are marked "Urgent" . ● Else, applications sent within the limit will be marked "Urgent" . <p>Ex. 3: Leave that start less than the 3-day advance notice period are marked "Urgent" .</p>	
Long Leave Threshold	Define how long qualifies as long leave.	
★Advance Notice (Long Leave)	Advance notice for long leave.	
Auto Escalation (Long Leave)	<p>Do long leave require a send-level manager' s approval?</p> <ul style="list-style-type: none"> ● No: Will not auto escalate the applications to the second-level manager. ● Yes: After the approval of the first level-manager, the applications will be automatically sent to the second-level manager for approval. 	
Auto Escation When Manager on Long Leave	<p>Are applications redirected to the second-level manager for approval when the first-level manager is on long leave?</p> <ul style="list-style-type: none"> ● No: First-level manager for approval. ● Yes: Bypass the first-level manager and redirect applications to the second-level manager for approval. 	
Pending Request Reminder (For Managers)	How many days should the system send reminders to the managers to sign off on pending leave requests?	
Carryover	<ul style="list-style-type: none"> ● Carryover rules for unused leave. 	Tab

Field	Description	Note
Balance Settings	<ul style="list-style-type: none"> It is recommended that you come back to these settings once you have completed the Leave Types. 	
Carryover Balance Model	Default is No Carryover. Once Carry Over All Unused Leave or Carry Over Partially Unused Leave is selected, you can't change back to No Carryover.	
Maximum Carryover Balance	<ul style="list-style-type: none"> Enter the max balance of the carryover leave when Carry Over Partially Unused Leave is selected. <p>The balance unit is based on the Leave Unit set in the Basic Settings.</p>	
Return Carryover Leave	Return the carryover balance to the employees when their leave applications are canceled or withdrawn.	
General Leave Carryover	General leave types that use these carryover rules.	
Carryover Date	Set a date on when to carryover the unused leave balances.	
Carryover Balance Expiry Date	Set a date on when the unused leave balances will expiry.	
Applicable Leave Types	<p>Select which leave types the above carryover rules will apply.</p> <ul style="list-style-type: none"> Applicable to only leave types with the Grant Frequency set to Yearly. 	
Pro-rated Tenure Leave Carryover > Applicable leave Types	<ul style="list-style-type: none"> Applicable to leave types with the Grant Frequency to Employment Anniversary Date. 	HR tool > Employee Profiles > Hire Date.
Application Period	Set the period allowed for backdated leave and future leave applications.	Tab

Field	Description	Note
From - To	Input a number.	
From - To Unit	Day(s), Month(s), Year(s)	
From - To Date	Set a specific date.	
Privacy	The Leave Overview Privacy Settings.	Tab
Enable Leave Overview	Enable/disable Leave Overview.	
Hide Sensitive Data	<ul style="list-style-type: none"> ● Yes: Only applicant name and leave time can be viewed by others. ● No: Applicant name, leave time, leave type, approval workflow, and comments can be viewed by others. 	
Display option	<ul style="list-style-type: none"> ● All Leave: All past and upcoming leave applications can be viewed by others. ● Upcoming Leave: Only upcoming leave can be viewed by others. 	
Request Workflow	Determine whether the HR Staff should get involved in the workflow process.	
HR Staff Approval?	<ul style="list-style-type: none"> ● Bypass HR Staff: HR Staff is not involved. ● HR Staff Takeover: Staff for approval. The request is sent to the applicant's manager for approval if they escalate. ● HR Staff First then Department Manager: The request is first sent to the HR Staff and then to the department manager. If HR Staff rejects, the process ends. ● Department Manager First then HR Staff: The request is first sent to the department manager and then to the HR Staff. If the department manager rejects, the process ends. 	

STEP

1

a

b

c

2

a

b

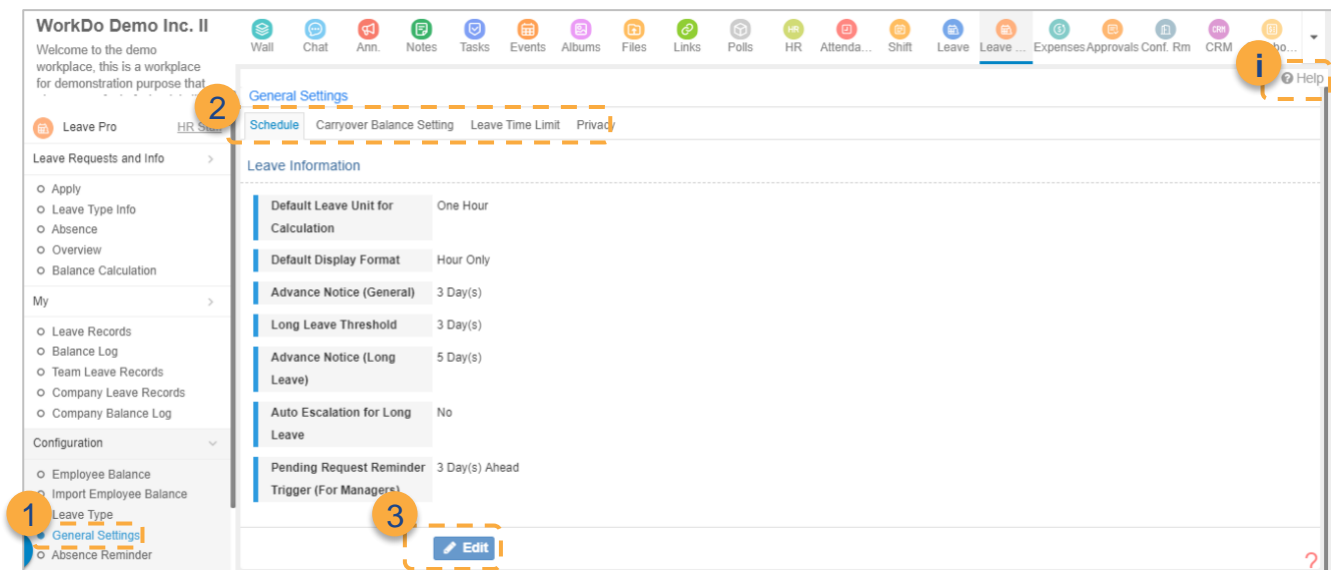
c

d

e

✓

This section contains settings that will be automatically applied to all leave types you create later as a default setting; you can still change the settings of each leave type.



- i** ▶ Click for online help.
- 1** ▶ Enter the General Settings.
- 2** ▶ Click the tabs to verify the information filled, if there are no changes need to be made, please go to [Step 2- b.](#)
- 3** ▶ Click the Edit button to edit each tab if necessary.



- 4** ▶ Fill out all necessary fields in the Basic Settings.



STEP

1

a

b

c

2

a

b

c

d

e

✓

5

► Carryover Balance Settings

- a. The settings can be skipped if unused leave does not carry over into the next calendar year.

b. Example

- ➔ General Leave Carryover - Up to 10 days of Personal Leave can be carried over into the next calendar year on Jan. 1st and expire on Dec. 31st.
- ➔ Pro-rated Tenure Leave Carryover - Up to 10 days of Annual Leave can be carried over on the member's employment anniversary.

General Settings Configuration

Schedule **Carryover Balance** Leave Limit Privacy

Carryover Balance Model **Carry Over Limited Unused Leave**

Max Carryover Balance: 10 Day(s)

Regular Leave Type Carryover

Carryover Date: Jan 1st

Carryover Balance Expiry Date: Dec 31st

Applicable Leave Types (Regular Leave Type)

Annual Leave

Sick Leave

Personal Leave

6

► Application Period

Example: Members can apply for backdated leave from up to 6 months ago and apply for leave up to a year from now.

General Settings Configuration

Schedule Carryover Balance **Leave Time Limit** Privacy

Leave From Limit: 6

Leave From Limit Unit: Month(s)

Leave From Limit Date: Format: MMdd

Leave To Limit: 12

Leave To Limit Unit: Month(s)

Leave To Limit Date: Format: MMdd

General Settings Configuration

Schedule Carryover Balance Leave Time Limit Privacy

Hide Sensitive Data ☒ Yes ☐ No

Save Reset Cancel

7 ▶ Privacy settings controls whether the employees can view the leave information in Leave Overview.

8 ▶ HR Staff for Approval?
If you would like the HR Staff to be involved in the request workflow process.

9 ▶ Click the Save button to finish.

STEP

1

a

b

c

2

a

b

c

d

e

✓

b. Leave Types

The flexibility of Leave Pro is designed to accommodate and retrofit each workplace' s internal leave policies and rules, thanks to the Auto Grant rules. Follow the five steps listed below, and the system will compare the rules with each employee' s profile ^[6] and grant the appropriate amount of leave days accordingly.

● Default Quota Grant

The Default Quota Grant determines the initial leave quota of any leave type for any employee in the Leave Types, and they may be different from employee to employee. Therefore, it is crucial to adjust the initial leave balance when deploying the Leave Pro tool.

● Verify Leave Balances

Please refer to STEP 3-h to adjust each leave type's balance; all changes are not retroactive. The new changes only apply to newly hired employees. And you will need to

⁶ The Job Tenure is based on the [HR tool's](#) Hire Date in the Employee Profiles.

refer to STEP 2-c to adjust other employees' leave days.



The Default Quota Grant only applies to newly hired employees. After that, all leave days will be doled out based on the rules set in the Auto Grant tab.

STEP

1

a

b

c

2

a

b

c

d

e



1 ▶ Click Leave Types.

2 ▶ Click + Create.

3 ▶ Fill out all information. Click the Auto Grant box to see the Auto Grant tab.

4 ▶ Fill out the fields in the Auto Grant tab.

5 ▶ Click the Save button to complete.

- Select Applicable Employees
- Either the rules apply to all employees, or
- Only apply to those who have not been manually edited of this leave type.
- Click Save again to finish.

c.Adjust Current Leave Balance

Upon creating the leave types, adjust the balance of employees who have already applied for leave requests before you activated Leave Pro.

My

Leave Records

Balance Log

Dept. Leave Records

Team Leave Records

Company Leave Records

Company Balance Log

Configuration

Employee Balance

Import Employee Balance

Leave Type

General Settings

Absence Reminder

Report

Employee Balance

Employee Name

Enter Employee Name

Department

Please Choose Department

Employee ID

Enter Employee ID

Total Records : 5

20

Records/Page

Department	Employee ID	Employee Name
Executive		Delores
Public Relations		Wayre
Human Resources		Joyce
Research & Development		Rick
Marketing		Eron

Employee Balance Detail

Department

Human Resources

Employee ID

Employee Name

Joyce

Employment Type

Full-Time

Gender

Female

On Board Date

2018-06-27

Manually Adjust Balance

Activate

Deactivate

Leave Type	Leave Balance	Carryover Balance	Status	Edit Time	Edited By
Personal Leave	20 hours	0 hour	Active	2020-04-17 12:23	Rick
Sick Leave	7 days	0 day	Active	2020-04-17 12:17	Rick
Marital Leave	8 days	0 day	Active	2020-04-17 12:18	Rick
Annual Leave	15 hours	0 hour	Active	2020-04-17 12:18	Rick

Adjust Leave Balance

Employee Name

Joyce

Leave Type

Personal Leave

Original Leave Balance

20 Hour(s)

Leave Value Adjustment

e.g. Enter 8 or -8

Hour(s)

Adjusted Leave Balance

20 Hour(s)

Carryover Balance

0 Hour(s)

Carryover Value Adjustment

e.g. Enter 8 or -8

Hour(s)

Adjusted Carryover Balance

0 Hour(s)

Reason for Adjustment

Save

Cancel

Original Leave Balance	Adjusted Leave Balance	Adjusted Leave Balance Result	Original Carryover	Adjusted Carryover	Adjusted Carryover Result	Reason for Adjustment	Adjusted
10 hours	10 hours	20 hours	0 hour	0 hour	0 hour		2020-04-17 12:23

STEP

1

a

b

c

2

a

b

c

d

e

✓

1 ▶ Employee Balance

2 ▶ Use the search bar to quickly locate employee profiles.

- 3 ▶ Click the Edit button.
- 4 ▶ Select a leave type for editing.
- 5 Fill out the Adjusted Leave Balance (the minus sign means deduction).
 - a. Leave Balance: The balance of this leave type of the year.
 - b. Carryover: Leave days carried over from previous year.
- 6 ▶ Click Save then go to the last page to see the adjustments made.
- 7 ▶ Repeat Step 4 -6 for each employee as needed.

【Special Circumstance】

When the workplace has contracted employees that require different leave types, please follow the steps below to manually grant leave balance to the employees.

From Step 3.

- 4 ▶ Click Manually Adjust Balance.

- 5 ▶ Select leave types and fill out the balances.
- 6 ▶ Click Save to finish.

STEP

1

a

b

c

2

a

b

c

d

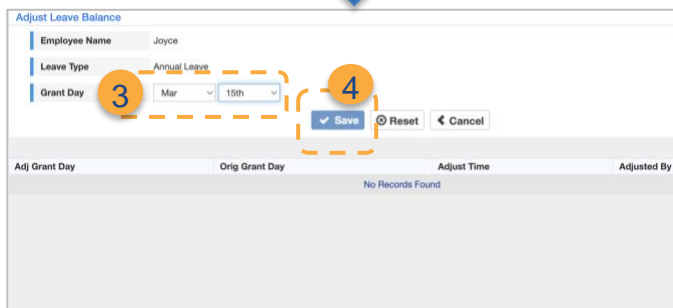
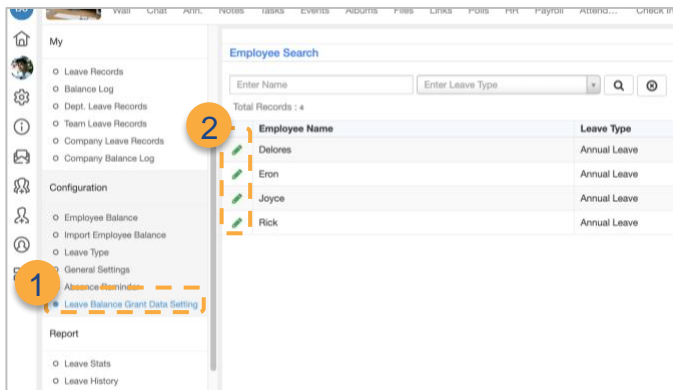
e

✓

d. Employment Anniversary Date Auto Grant

For leave types that auto grant on employees' employment anniversary dates, please

refer to the steps below, else you could skip this section.



- 1 ▶ Click the **Auto Grant Setting**.
- 2 ▶ Click the Edit icon next to the applicable employee and leave type.
- 3 ▶ Grant Day: Enter the employee's employment anniversary.
- 4 ▶ Click Save to finish.

STEP

1

a

b

c

2

a

b

c

d

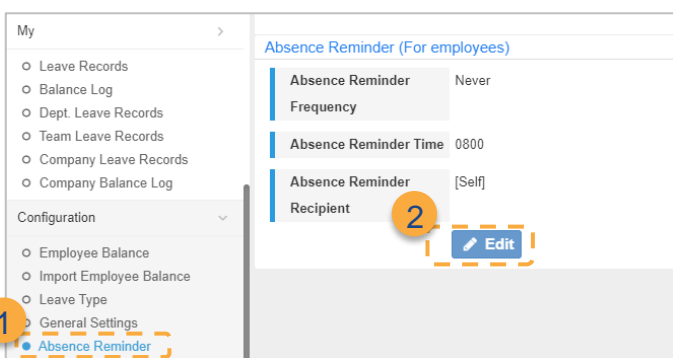
e

✓

e.Absence Reminder

In addition to the Absence function, Leave Pro also has the Absence Reminder function to remind employees to apply for leave when they do not show up for work.

The default setting of the Reminder Frequency is set to Never. You may skip this step if you do not need to set up notifications.



- 1 ▶ Click Absence Reminder.
- 2 ▶ Click the Edit button to begin editing.

The screenshot shows the 'Edit Absence Reminder' form. A dashed orange box labeled '3' encompasses the 'Absence Reminder Frequency' (set to 'Daily'), 'Absence Reminder Time' (set to '1030' with format 'HHmm'), and 'Absence Reminder Recipient' (with checkboxes for 'Dotted-Line Manager', 'Line Manager', and 'Self', all checked). A callout labeled '4' points to the 'Save' button at the bottom of the form.

Example: Send notification at 10:30am every day to employees^[7] and their managers.

- 3 ► Fill out all fields.
- 4 ► Click Save to finish.

STEP 3 .Start

Congratulations on completing the Leave Pro setup! Now you and your team may begin applying for leave online, and the semi-automatic system will track and dole out the appropriate leave days based on each employee's tenure and status accordingly. And if you use the Payroll tool in tandem, it can also keep track of employees' attendance and calculate the correct pay for the whole team, drastically reducing the manual labor needed for these tasks!

⁷ When the frequency is set to One-Time, the notification will be sent on the day after the day of absence. This feature is not retroactive for leave days before the day of setup.

Addendum 1 : Leave Type Examples

Please note that the [HR tool](#) is integral to Leave Pro, so please take the time to complete its settings first before enabling Leave Pro for use.

Every company has its own leave policies, hence this example may not apply to your company, but it will highlight key items for setting up leave types.

Ex.

1

Single Grant

Maternity and bereavement leave are considered single grant leave types as they do not depend on tenure and seniority.

• Leave Type Code

ML

• Leave Type Name

Maternal Leave

• Advance Notice

3

Day(s)

• Leave Day Type

Working Day

• Leave Type Status

Active

• Payroll Policy

Paid

• Auto Grant

☐

• Leave Unit for Calculation

☐ Half Hour ☐ One Hour ☐ Half Day ☒ One Day

Detail

Eligibility

• Leave Type Remark

1. 10 days per year for every permanent employee.
2. Please make an advanced notice to your manager before taking the leave.

• Check Deputy Status

☒ Yes ☐ No

• Allow Advance Leave Quota

Day(s)

• Deduct Carryover First

☒ Yes ☐ No

• Grant/Carryover Execution Order

☒ Carryover first then the granted ☐ Grant first then the carryovers

• Show History Range

☐ All ☒ This year

• Grant Default Quota

☒ Yes ☐ No

• Constrained by Leave Time Limit

☒ Yes ☐ No

• Default Leave Quota By Rule

☐ Yes ☒ No

• Default Leave Quota:

10

Day(s) (Employees will be immediately eligible to claim these days off when on board)

• Default Leave Quota by Proportion

☐ Yes ☒ No (Default leave quota is prorated based on the number of days from the date of employment)

• HR Remark

✓ Save

⌂ Reset

↩ Cancel

- Key Fields

Leave Type Field	Applicability
▶ Auto Grant	Not applicable for single grant leave types.
▶ Leave Unit	The minimum base unit for apply this leave.
▶ Grant Default Quota	Applicable for new employees that join the WorkDo workplace.
▶ Default Leave Quota By Rule	Click No for single leave grant.
▶ Default Leave Quota	Fill in the hours / days for grant or you could set it to 0, and use the Adjust Current Leave Balance for special circumstances.
▶ Default Leave Quota By Proportion	Applicable for employees who have been hired for a certain time.

2

Annual Grant

Annually granted leave types i.e. personal leave, sick leave, etc.

Help

Edit Leave Type

Leave Type Code

PL

Leave Type Name

Personal Leave

Advance Notice

0

Day(s)

Leave Day Type

Working Day

Leave Type Status

Active

Payroll Policy

Paid

Auto Grant

Leave Unit for Calculation

Half Hour

One Hour

Half Day

One Day

Detail

Eligibility

Auto Grant

Leave Type Remark

1. 10 days per year for every permanent employee.
2. Properly assign the tasks to your deputy before taking the leave.
3. Leave days that are over 5 days must be signed off by the director.

Check Deputy Status

Yes

No

Allow Advance Leave Quota

Day(s)

Deduct Carryover First

Yes

No

Grant/Carryover Execution Order

Carryover first then the granted

Grant first then the carryovers

Show History Range

All

This year

Grant Default Quota

Yes

No

Constrained by Leave Time Limit

Yes

No

Default Leave Quota By Rule

Yes

No

Default Leave Quota by Proportion

Yes

No

(Default leave quota is prorated based on the number of days from the date of employment)

HR Remark

Save

Reset

Cancel

Detail Eligibility **Auto Grant**

Grant Frequency ☐ Monthly ☒ Yearly ☐ Year Of Service

Grant Description System will grant all the leave balance for a year to employees on annual grant date based on the GRANT RULE and ADDITIONAL RULE.

Annual Grant Date: Jan / 1st

* Reset To Zero Before Grant ☒ Yes ☐ No

* Calculate Work Experience Type ☒ Total Work Year ☐ Work Year After Hired

Grant Rule

+ Create

Years of Service Lower Limit	Years of Service Upper Limit	Grant Quota	Function
1	Enter Years of Service Upper Limit	40	Hour(s) Delete ?

● Key Fields

Leave Type Field	Auto Grant
▶ Auto Grant	Click Yes for annual auto grant.
▶ Leave Unit	The minimum base unit for apply this leave.
▶ Allow Advance Leave Quota	Fill in the number of days leave advancement is allowed for employees. 0 means it is not allowed, while blank means there is no limit on the leave advancement.
▶ Grant Default Quota	Applicable for new employees that join the WorkDo workplace.
▶ Default Leave Quota By Rule	Click Yes if there is a rule applied to this leave.
▶ Default Leave Quota	This option is not available due to Auto Grant.
▶ Default Leave Quota By Proportion	✓ Click No is tenure is not irrelevant. ✓ Click Yes if tenure is relevant and the leave will be granted based on proportion ^[8] .

⁸ Ex. If the annual leave is 20 days per year. Employee A' s hired date is July 1st, employee A can have $20 \times (6/12) = 10$ days of annual leave.

Leave Type Field

Auto Grant

- | | |
|------------------------------|---|
| ▶ Grant Frequency | Select Yearly for annual grant. |
| ▶ Reset to Zero Before Grant | Unused leave will not be compensated or carried over to the next year. |
| ▶ Grant Rule | <p>Click + Create to add a rule.</p> <ul style="list-style-type: none"> ✓ No rule: enter 0 for lower limit and leave upper limit blank. ✓ Add rule: enter figures for lower limit and upper limit, unfilled upper limit means no limit. |

Ex.

3

Tenure Grant

Annual leave, paid leave, or vacation leave are given based on employee tenures.

[Edit Leave Type](#)
Help

<div> <div>Leave Type Code</div> <div>AL</div> </div> <div> <div>Leave Type Name</div> <div>Annual Leave</div> </div> <div> <div>Advance Notice</div> <div>3</div> <div>Day(s)</div> </div> <div> <div>Leave Day Type</div> <div>Working Day</div> </div>	<div> <div>Leave Type Status</div> <div>Active</div> </div> <div> <div>Payroll Policy</div> <div>Paid</div> </div> <div> <div>Auto Grant</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Leave Unit for Calculation</div> <div> <input type="radio"/> Half Hour <input checked="" type="radio"/> One Hour <input type="radio"/> Half Day <input type="radio"/> One Day </div> </div>
---	---

[Detail](#)
[Eligibility](#)
[Auto Grant](#)

Leave Type Remark

1. Over 6 months but under 1 year of employment: 3 days.
 2. Over 1 year but under 2 years of employment: 7 days.
 3. Over 2 years but under 3 years of employment: 10 days.

Check Deputy Status

☐ Yes
 ☒ No

Allow Advance Leave Quota

Day(s)

Deduct Carryover First

☒ Yes
 ☐ No

Grant/Carryover Execution Order

☒ Carryover first then the granted
 ☐ Grant first then the carryovers

Show History Range

☐ All
 ☒ This year

Grant Default Quota

☐ Yes
 ☒ No

Constrained by Leave Time Limit

☒ Yes
 ☐ No

HR Remark

Save

Reset

Cancel

Detail Eligibility **Auto Grant** Help

Grant Frequency: ☐ Monthly ☒ Yearly ☐ Year Of Service

Grant Description: System will grant all the leave balance for a year to employees on annual grant date based on the GRANT RULE and ADDITIONAL RULE.

Annual Grant Date: Jan / 1st

Reset To Zero Before Grant: ☐ Yes ☒ No

Calculate Work Experience Type: ☒ Total Work Year ☐ Work Year After Hired

Grant Rule

[+ Create](#)

Years of Service Lower Limit	Years of Service Upper Limit	Grant Quota	Function
0.5	1	24 Hour(s)	Delete
1	2	56 Hour(s)	Delete
2	3	80 Hour(s)	Delete
3	5	112 Hour(s)	Delete
5	10	120 Hour(s)	Delete
10	Enter Years of Service Upper Limit	120 Hour(s)	Delete

Additional Rule

[+ Create](#)

Years of Service Lower Limit	Annual Increase Quota	Maximum Grant Quota	Function
10	8 Hour(s)	240	Delete

● Key Fields

Leave Type Field	Auto Grant
▶ Auto Grant	Enable auto grant so the system grants leave days based on the tenure of each employee.
▶ Leave Unit	The minimum base unit for apply this leave.
▶ Leave Type Remark	Please fill out his part with leave grant rules and allowance for employees to view beforehand and avoid conflicts later on.
▶ Deduct Carryover First	Leave with carryover setup. Click Yes and carryover balances will be deducted first. Please see General Settings for details.
▶ Grant / Carryover Execution Order	<p>Ex.: Carry over 10 days max. By Dec. 31st, still 10 days left. Carryover and grant date is Jan. 1st.</p> <ul style="list-style-type: none"> ● Grant first: employee will have a balance of 10 days. ● Carryover first: employee will have a balance of 11 days.

► Default Grant Quota	Select No since the leave is based on tenure, so it is not applicable for new employees that join the WorkDo workplace.
-----------------------	---

Leave Type Field	Auto Grant
► Grant Frequency	<p>Choose Years Of Service.</p> <ul style="list-style-type: none"> ● Month – Leave days are granted monthly on a set date, fill in a number 1-31. ● Yearly – Leave days are granted yearly on the set date. This option goes by the calendar year. ● Job Tenure – Leave days are granted yearly based on the hire date of each employee, thus, every employee is granted on a different date annually.
► Reset to Zero Before Grant	This depends on your company policy.
► Grant Quota	Click + Create to add grant rules by setting upper and lower limits of tenure and individual grant hours/days.
► Additional Rule	Any additional rules such as years of service exceed certain number would receive an extra annual leave days on top of maximum annual leave days until a specific number of years of service, etc.

Addendum 2 : Leave Calculation

Leave Pro supports 2 types of leave calculations for annual leave i.e. vacation leave depending your company policy.

- Job Tenure: This option is based on each employee's hire date.
- Yearly: This option is based on the calendar year.

The key difference between the two is how one year is being interpreted. For Years of Service, the employees' hire dates determine their tenure. As for Yearly, it operates according to the calendar year; the tenure only accumulates on the date of your choosing, generally, that is the 1st of January of every year.



When Leave Pro is first enabled, the system will grant all available leave days based on employees' tenure, therefore, the HR Staff must manually [adjust the leave balance](#) of each employee beforehand. The newly hired employees will remain unaffected by this. The system will follow the logic and rules you set and dole out the leave on the grant date accordingly hereafter.

Ex. In a hypothetical situation, suppose the labor law of a country mandates that all permanent employees should have 10 days of annual leave days in the first 2 years of service and 14 days in year 3.

Employee A joins the team on April 25th, 2016, and by Jan 1st, 2020, A would have been on the team for 3 years and 8 months.

In 2019, Employee A would have crossed the third-year threshold, thus the correct calculation of his leave days in 2020 would be calculated as below.

Example of Annual Leave Days Calculation

1. Hourly

An 8 hour work day would have 80 hours of leave for the first 2 years and 112 hours in the third year.

2. By Calendar Year

4 months of Employee A' s tenure belong to year 2, and 8 months belong to year 3.

$$80 \text{ hours} \times 4 / 12 \text{ Months} + 112 \text{ hours} \times 8 / 12 \text{ months} \\ = 101.33 \text{ hours}$$



Please enable the use of Attendance, Overtime, Expense, Approval, etc. and let WorkDo remove the daily drudgeries out of your life, so your team can focus on things that matter!



[Contact Us](#)



[WorkDo](#)



[Manuals](#)