

Leave Management System

Introduction

The Leave Management System 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.

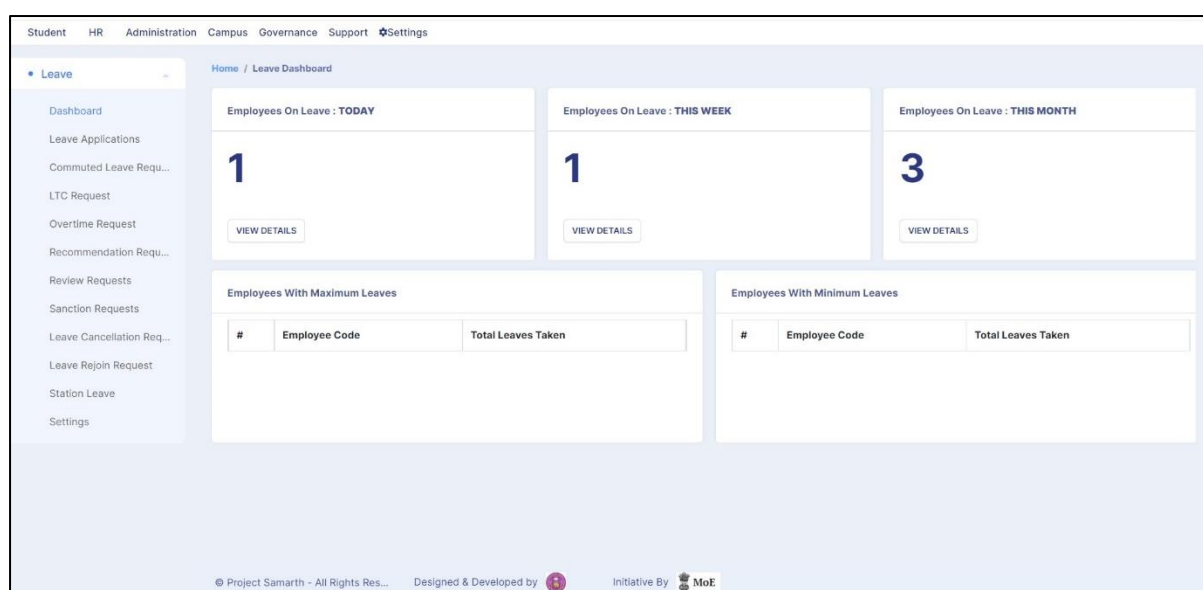
This module maintains all relevant information related to the Leave Management System (LMS), including leave settings configuration, leave application, and leave approval process.

The 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 has accessibilities to Leave Applications, Commuted Leave Request, Recommendation Request, Review Request, Sanction Request, Leave Cancellation Request, Leave Rejoin Request, and Station Request. The dashboard is used to get an overview of the Leave Management for all the employees working in the University Organisation Unit.



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, and leave rules and assign the number of leaves to the employee under the settings menu. Settings have the following sections:

- Leave
- Leave Type

- Employee Leave Mapping
- Leave Account
- Leave Ledger
- Authorities
- Assign Authorities
- Compensatory Leaves
- Holidays
- Import Leaves
- Special Leave Rules
- Leave Configuration
- Employee Week-off
- Custom Mail Template
- Leave PDF Template

Settings		
Showing 1-18 of 18 items.		
Id	Name	Action
1	Leaves	
2	Authorities	
3	Leave Rules	
4	Employee Leave Mapping	
5	Assign Authorities to Employees	
6	Employee Station Leave Authority Mapping	
7	Leave Account	
8	Leave Ledger	
9	Compensatory Leaves	
10	Holidays	
11	Import Leaves	
12	Leave Configuration	
13	Leave PDF Template	
14	Employee Week-off	
15	Special leave rules	
16	Custom mail Template	

Leave

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

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

Admin can add a new leave name by clicking on the **Add New**

Leave Type

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

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

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

Leave type configurations are automatically fetched according to employees' cadre and gender, we can 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 filling in the required details.

The **Approval Mechanism** rules can be define by selecting/clicking on the **ON** button and then filling in the details like:-

- Default Sanction Authority
- Recommending Authority
- Recommending Designation
- Additional Reviewers

Can define Notification on leave performed action

- **Notification On Submit:** admin can set to whom notification will be sent at the time of leave submit
- **Notification On Recommend:** admin can set to whom notification will be sent at the time of leave submission.
- **Notification On Review:** admin can set to whom notification will be sent at the time of leave submission.
- **Notification On Sanction:** admin can set to whom notification will be sent at the time of leave submit
- **Notification On Cancel:** admin can set to whom notification will be sent at the time of leave submission
- **Notification On Rejoin:** admin can set to whom notification will be sent at the time of leave submission.

Employee Leave Mapping

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

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.

Leave Ledger

Also called the book of final entry, a **ledger** records classified and summarised financial information from journals as debits and credits and shows their current balances. It helps employers showcase their actual monthly leave credit as per rules & leave type with utmost transparency.

Authorities

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

Assign Authorities to Employees

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

Admin can assign different authorities to individual employees.

Holidays

In this field, all the Leave prefixes and suffixes are taken care of.

Import Leaves

In this section, the admin can bulk import the leave balance of the employees.

Leave Configuration

In this section, the admin can choose the different types of leave options that are applicable in the University.

Special Leave Rules

In this section, the admin can configure special leave rules for a particular leave.

Custom Mail Template

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

Custom Mail Template

In this section, the admin can add a new customized PDF Template for Sanction Letter, and Rejoining Letter.

Leave Application

This section is visible to all the employees where they can apply for 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 filling 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")

e. Finance Obligation

f. Finance Assistance (If Finance Obligation 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

Applicants can view the details by clicking on the **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 duties can be changed by selected authority in his panel.

New Leave Application

Leave *

From Date / Time

To Date / Time

Prefix

Suffix

Reporting Designation

Reason / Description *

Purpose *

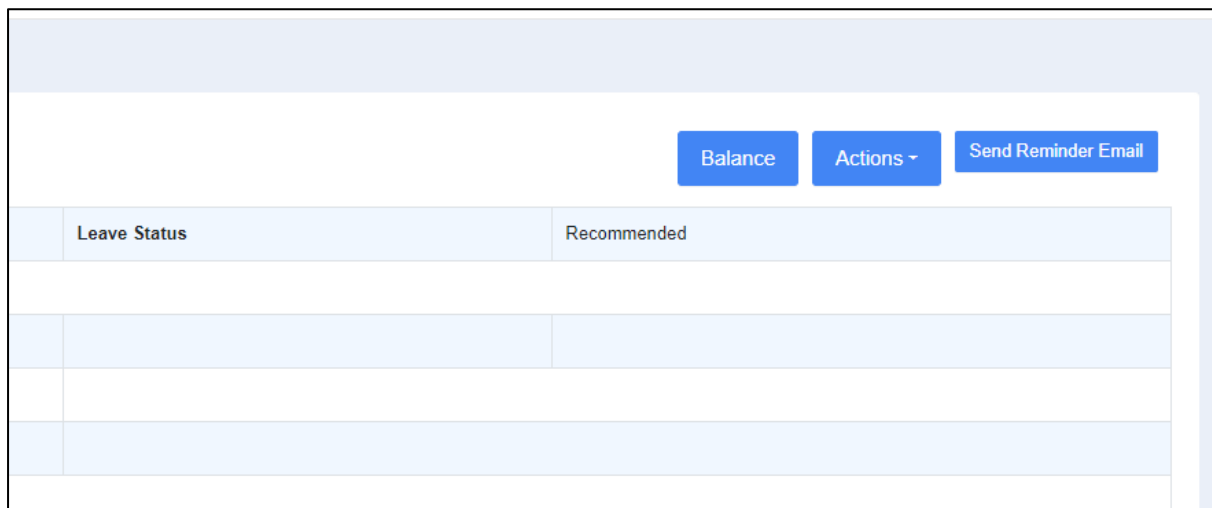
Upload Supporting Document

Drag & drop files here ...

Station Leave ? *

Send Reminder for Approval of Leave

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



Edit

Applicants can update/edit the details by clicking on the **Edit** icon.

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/Employees 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 cancellation if he/she doesn't want to take the leaves for which he has already applied before by clicking on the **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 The mail goes to the employee and the sanctioning authority for actual approval.

Leave Applications												New Leave Application	Export
Employee Code	Employee Details	Service Cadre	Leave Record Number	Leave	From Date	To Date	Days	Status	Pending with	Rejoin	Submission Date	Actions	
	Select Employee			All				All	All				
PT200001079	Tara chauhan , tara chauhan, PT200001079, Professor,DEPARTMENT OF COMPUTER SCIENCE	Teaching	CML1626932836	Commuted Leave	Jul 2, 2021	Jul 2, 2021	1	New Request	REGISTRAR(Administration)	Not required		 	

Commutated 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.

Commutated 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.

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.

Leave Applications for Recommendation										
Select Columns Export Showing 1-20 of 29 items.										
#	Employee Code	Employee Details	Leave Record Number	Leave Type	From Date	To Date	Days	Action Required	Status	Actions
	<input type="text"/>	<input type="text" value="Select Employee"/>	<input type="text"/>	<input type="text" value="All"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	
1	PN202201620	asdfgh , asdfgh, PN202201620, Libraryyy, clerkkkk	SCL1232200308	Sanjay casual leaves123	Oct 18, 2022	Oct 21, 2022	4	No	New Request	<input type="button" value="View"/> <input type="button" value="Tick"/>
2	PT202201534	Vivek Yadav, Mr. Vivek Yadav, PT202201534, Deptt of Computer Science, Assistant Professor	EL 2200288	Earned Leave	Oct 14, 2022	Oct 15, 2022	2	No	New Request	<input type="button" value="View"/> <input type="button" value="Tick"/>

View

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

Take Action (Recommend)

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

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

- Recommend status (Select From drop-down)
- Comments

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.

Leave Approval	Earned Leave NT
Approver's Designation and Organization	Leave Record Number
REGISTRAR (University Campus)	Employee Name & Code
Application Status	Employee Organization Unit
Recommended	Designation
	Leave Type
	Reporting Manager
	From
	Total Days applied for :
	Prefix:
	Reason / Description
	Purpose
	Station Leave
	Visiting Country/State Address

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

Leave Approval	Duty Leave
Approver's Designation and Organization	Leave Record Number
REGISTRAR (University Campus)	Employee Name & Code
Reviewer Status *	Employee Organization Unit
Mark for Approval	Designation
Review Remarks	Leave Type
	Reporting Manager
Submit	From
	Total Days applied for :
	Prefix:
	Reason / Description
	Purpose
	Station Leave
	Visiting Country/State Address

Sanction Requests

View:

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

Take Action (Sanction)

Sanctioning Authority can recommend the leave by clicking on the **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 the.

Leave Approval

Approver's Designation and Organization
 REGISTRAR (University Campus)

Sanction Status *

Select ▼

Sanction Remarks

Submit

Casual Leave NT

Leave Record Number

Employee Name & Code

Employee Organization Unit

Designation

Leave Type

Reporting Manager

From

Total Days applied for :

Prefix:

Reason / Description

Purpose

Station Leave

Leave Cancellation Request

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

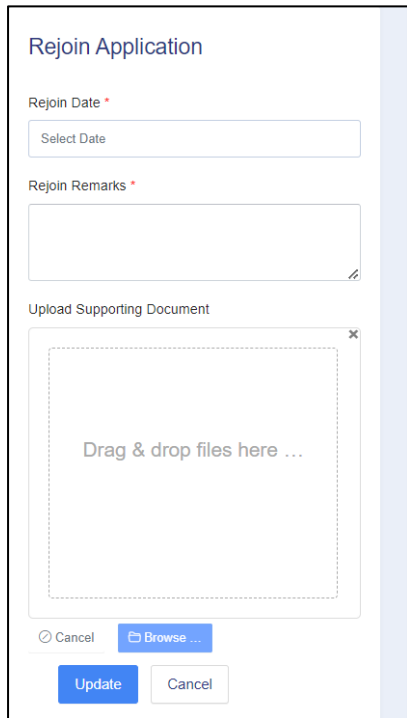
Leave Management > Leave Cancellation Request.

Employee Code	Employee Details	Service Cadre	Leave Record Number	Leave	From Date	To Date	Days	Status	Pending with	Rejoin	Submission Date	Actions
	Select Employee ▼	▼		All ▼				All ▼	All ▼			
PT200001079	Tara chauhan , tara chauhan, PT200001079, Professor DEPARTMEN T OF COMPUTER SCIENCE	Teaching	CML1626932836	Commuted Leave	Jul 2, 2021	Jul 2, 2021	1	New Request	REGISTRAR(Administration)	Not required		

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.



The screenshot shows a web form titled "Rejoin Application". It contains the following fields and controls:

- Rejoin Date ***: A date selection field with a "Select Date" button.
- Rejoin Remarks ***: A large text area for entering remarks.
- Upload Supporting Document**: A section for uploading files, featuring a dashed border and the text "Drag & drop files here ...". Below this area are two buttons: "Cancel" and "Browse ...".
- At the bottom of the form are two buttons: "Update" and "Cancel".

The leave rejoin request will go to the reporting manager that has taken action on it.

Station Leave

If any employee is taking leave and going out of station then he/she can add the out-of-station leave details by clicking the station leave option and this option is there for both employee and module admin.

Leave Management > Station Leave.

Add new Station Leave Information

From Date

To Date

Mobile Number

Address

Reason

Logins

There will be five types of logins and dashboards: -

- **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 **Settings** to configure the holidays, leave, leave type, and authority. Then configure the employee mapping with leaves and authorities, and so on.

To be followed by the *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*

- 1: Login as Recommending authority to recommend the leave of an employee.
- 2: Go to the **Recommend Requests** section from the left side panel.
- 3: To understand the process of how to Recommend leave, go to "Recommend Request".

To be followed by *Reviewing the 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 "Review Request".

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 "Sanction Requests".