

# Employee Perspective

The employee has the ability to request leave from the Leave Portal. The leave history, summary, calendar and leave balance are available for the employee to view.

## Leave Portal

The Leave Portal can be accessed under the Main Menu | Leave.

As seen below, the various sections can be found on the Leave Portal.

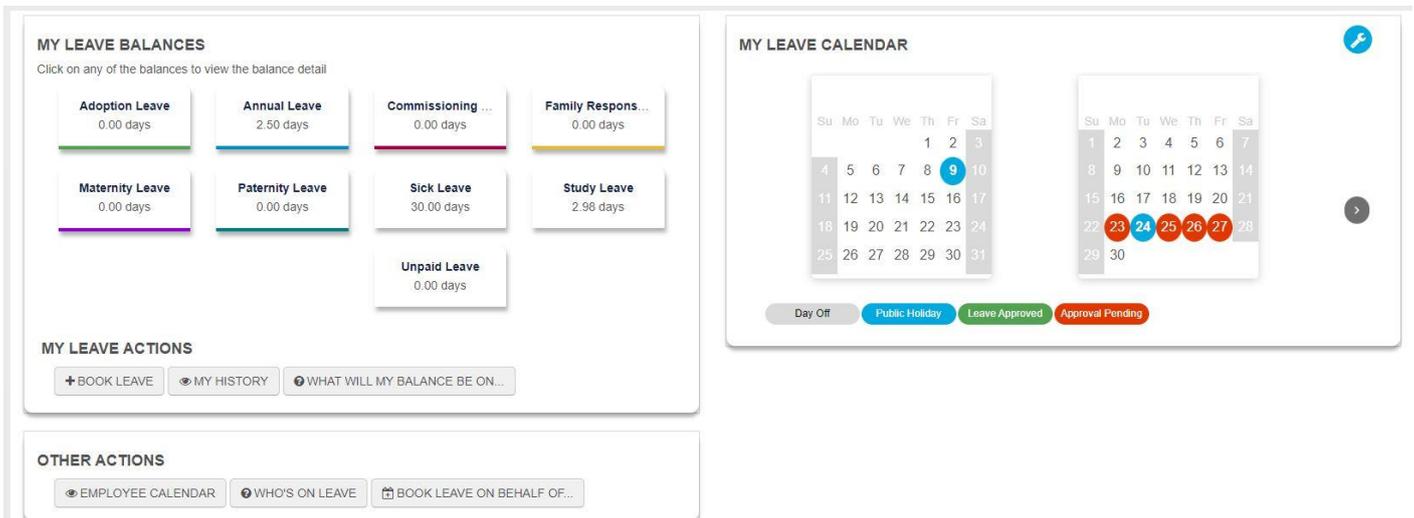


Image not found or type unknown



Each item will be discussed next.

## 1. Book Leave

Employees needing to apply for leave can book leave themselves and managers can approve the leave submitted by their employees. The process in applying for leave is very intuitive and user-friendly.

Navigate to the + Book Leave icon and click on it.

The + Book Leave consists of sections. Some sections are informational and others needs to be completed. These sections are:

- Your current available leave balances
- Indicate the type of leave you would like to request
- Leave Details
- Supporting Documentation

## 1.1 Your current available leave balances

In this section, all leave balances that are applicable to the employee are displayed here:

**Request Leave** ? 📄 ✉️ 👤

[Leave Portal](#) » [Request Leave](#)

### Your current available leave balances

Leave Type	Available Balance ⓘ
SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	19.00

[View Balance Statement/s](#)

### Indicate the type of leave you would like to request

Leave Type \*

Request Details	
Employee Number	23Leave10
Name	Erica
Surname	Crook
Start Date In Company	2019/06/23
Leave Group	SCH 23 Annual Leave Group (Start Date in Company, Accrual Comparison also Start Date in Company)
Status	Not Submitted Yet

Each employee will be able to view their own leave balance statement to indicate what transactions have occurred on a specific leave type for a specified period.

The employee's leave balance statement can be viewed by selecting the *View Balance Statement/s* button:

## Leave Balance Summary Statement

Leave Type: SCH 23 Annual Leave S  
From: 2020/06/23  
To: Transaction Date

Excel PDF Search

Reference	Transaction Type	Transaction Date	Leave Type	Leave Sub Type	Days Gained	Days Deducted	Balance
	Opening Balance	2020/06/23					1.92
1444	Accrual	2020/07/23	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	Accrual	1.92		3.83
14769	Accrual	2020/08/23	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	Accrual	1.92		5.75

### Leave Balance Summary For SCH 23 Annual Leave Start Date in Company (created 2020-06-24) (2020/06/23 - 2021/06/22)

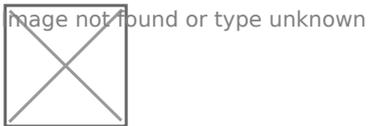
Total Entitlement	23.00
Approved Past and Current Records	0.00
Approved Future Records	4.00
Leave Days Awaiting Approval	0.00
Total Forfeited	0.00
Other Adjustments	0.00
Leave Balance Summary For SCH 23 Annual Leave Start Date in Company (created 2020-06-24) as at 2021/06/22	19.00

Close

The employee has the option to export the leave balance summary statement information to either Excel/PDF.



The *Leave Balance Summary Statement* provides a summary of the Leave Balance for the selected leave type for the current leave cycle.



## 1.2 Indicate the type of leave you would like to request

Here the employee chooses the type of leave he wants to apply for.

### Indicate the type of leave you would like to request

#### Leave Type \*

Please select a leave type

- Please select a leave type
- Annual Leave
- Sick Leave
- Family Responsibility Leave
- Study Leave
- Unpaid Leave

Once the Leave Type is selected, the employee has the option to select the booking type for example, Full day, Half day or Short time

**Booking Type \***

Please select a booking type

Please select a booking type

Full Day

Half Day

## 1.3 Leave Details

Here, the employee specify the leave details such as the reason applying for leave, which date the employee is applying for leave, when the employee will be back at work and who to contact while on leave.

On the right, the employee can see who will be approving the leave applied for.

**Leave Details**

I will be on leave:

**From Date \*** 2020/09/25

**Until Date \*** 2020/09/25

**Will be back at work on** 2020/09/28

**Number of Days \*** 1

**During my leave, please contact**

Show More Options

Level	Who will approve my leave request	Approval Date	Approved
1	Mondli Msomi(Leave Manager), (),		✘

## 1.4 Supporting Documentation

If applying for Sick Leave, Family Responsibility etc., the supporting documentation can be uploaded.

## Supporting Documentation

Drop files here to upload

## 2. My History

Employees need to have a history of all leave applied for. This can be seen under My History.

The leave history section shows all the employee's leave history and requests which still need to be actioned.

Leave requests can be viewed or cancelled.

### Leave Requests

Action	Status	Leave Type	Reference	Start Date	End Date	Number of Days	Requested Date
 View / Cancel	Awaiting Manager Approval	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	452	2020/09/25	2020/09/25	1.00	2020/09/22

### Leave History

Status	All	Leave Type	All	Start Date		End Date	
--------	-----	------------	-----	------------	--	----------	--

 Search

Action	Status	Leave Type	Id	Start Date	EndDate	Number of Days	Requested Date
 Open	HR Approved	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	450	2020/09/01	2020/09/01	1.00	2020/09/22 01:28:51 PM
 Open	HR Approved	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	451	2020/07/08	2020/07/10	3.00	2020/09/22 01:29:39 PM

## 2.1 Leave Requests

This section displays all leave records not yet approved. You are able to view the record and/or cancel the leave applied for.

## Leave Requests

Action	Status	Leave Type	Reference	Start Date	End Date	Number of Days	Requested Date
 View / Cancel	Awaiting Manager Approval	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	452	2020/09/25	2020/09/25	1.00	2020/09/22

When viewing the record, the following information are displayed:

- Leave Balance
- Leave Details
- Request Details
- Supporting Documentation
- Approval Workflow

### 2.1.1 My Leave Balances

The leave balance has the available balance and balance summary for the cycle.

Leave Portal > My Leave Summary									
Leave Balance Summary									
Items	Annual Leave	Sick Leave	Family Responsibility Leave	Maternity Leave	Paternity Leave	Commissioning Parent Leave	Adoption Leave	Study Leave	Unpaid Leave
Opening Balance	0	0	0	0	0	0	0	0	0
Total Entitlement	15	30	5	0	0	0	0	2.98	0
Approved Past and Current Records	0	0	0	0	0	0	0	0	0
Other Adjustments	0	0	0	0	0	0	0	0	0
Approved Future and Non-Processed Records	0	0	0	0	0	0	0	0	0
Leave Days Awaiting Approval	4	0	0	0	0	0	0	0	0
Total Forfeited	0	0	0	0	0	0	0	0	0
Available Balance for Cycle	11	30	5	0	0	0	0	2.98	0
Actual Balance for Today	2.50	30	0	0	0	0	0	2.98	0

When selecting the information icon next to each *Leave Balance Summary* item, the information per item is displayed.

Image not found or type unknown



### 2.1.2 Leave Details

The leave details specified by the employee are displayed.

## Leave Details

---

<b>Leave Type</b>	Annual Leave
<b>Leave Type Reason</b>	
<b>Status</b>	Awaiting Manager Approval Main Manager: Gawie Lotter (gawie.lotter@signify.co.za)
<b>From</b>	Monday, 09/23/2024
<b>To</b>	Friday, 09/27/2024
<b>Returning on</b>	09/28/2024
<b>Days</b>	4.00

### 2.1.3 Request Details

The employee's details who submitted the leave request are displayed.

#### Request Details

---

<b>Reference</b>	11
<b>Employee Number</b>	erika.fourie@signify.co.za
<b>Surname</b>	Fourie
<b>Name</b>	Erika
<b>Position</b>	Administrator
<b>Status</b>	Awaiting Manager Approval Main Manager: Gawie Lotter (gawie.lotter@signify.co.za)
<b>Date Submitted</b>	08/26/2024
<b>Date Engaged</b>	07/02/2024

### 2.1.4 Supporting Documentation

Any documentation uploaded as supporting documentations are displayed.

## 2.1.5 Approval Workflow

The approval details will be displayed in this section as soon as the leave approver approved the leave record.



### Approval Workflow

#### Level 1 Status:

Awaiting Manager Approval by:

Main Manager: Gawie Lotter (gawie.lotter@signify.co.za)

## 2.1.6 Cancel Leave Request

The leave record can be cancelled if required.

Cancel Leave Request

Back To List

## 2.2 Leave History

A list of all leave records submitted will be displayed in a list format. Details can be seen by opening a record.

### Leave History

Status All Leave Type All Start Date End Date

Search

Action	Status	Leave Type	Id	Start Date	EndDate	Number of Days	Requested Date
Open	HR Approved	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	450	2020/09/01	2020/09/01	1.00	2020/09/22 01:28:51 PM
Open	HR Approved	SCH 23 Annual Leave Start Date in Company (created 2020-06-24)	451	2020/07/08	2020/07/10	3.00	2020/09/22 01:29:39 PM

## 3. My Leave Summary

A summary is available for the employee in order for them to have a view of changes made to their leave balances.

A leave balance summary for each leave type is displayed, with a description for each item when selecting the information icon:

- **Total Entitlement:** The total amount of leave an employee is entitled to for the current leave cycle. This amount is determined by the assigned leave group and its configuration.
- **Approved Past and Current Records:** This is the sum of all an employee's leave which has already taken place (today and dates in the past), and which has been approved for the current cycle. A leave record is treated as a unit and once the leave record's start date has been reached, all days in the leave record will show as approved and taken.
- **Other Adjustments:** The correction applied to an employee's leave balance for the current leave cycle. This can be a result of the manual adjustment loaded by a leave administrator or automatic adjustments created by the system according to the rules of the assigned leave group.
- **Approved Future Records:** This is the sum of all of an employee's leave which will take place on a future date, and which has already been approved for the current cycle.
- **Leave Days Awaiting Approval:** This is the sum of all of an employee's open leave requests (those which have not yet been approved), both past and future dated falling within the current cycle.
- **Total Forfeited:** The total amount of leave forfeited for the current cycle.
- **Leave Balance Summary For Cycle:** Employee's available balance for the leave type's current cycle: Available Balance = Total Entitlement + Adjustments - (Leave Approved and Already Taken + Leave Approved and Not Yet Taken + Leave Awaiting Approval)

The employee's leave balance statement can be viewed by selecting the *View Balance Statement/s* button, as discussed under the "Your current available leave balances" section above.

#### Leave Balance Summary

Items	SCH 23 Annual Leave Type	SCH 23 Sick Leave - Recurrent	SCH 23 Family Responsibility Leave	SCH 23 Sick Leave - No Recurrence	SCH 23 Study Leave
Total Entitlement	18.47	18.02	2.41	0.00	1.58
Approved Past and Current Records	0.00	0.00	1.00	0.00	0.00
Other Adjustments	6.86	0.00	23.00	0.00	0.00
Approved Future Records	1.00	0.00	0.00	0.00	0.00
Leave Days Awaiting Approval	1.00	0.00	0.00	0.00	0.00
Total Forfeited	0.00	0.00	-22.41	0.00	0.00
Leave Balance Summary For Cycle	23.33	18.02	2.00	0.00	1.58

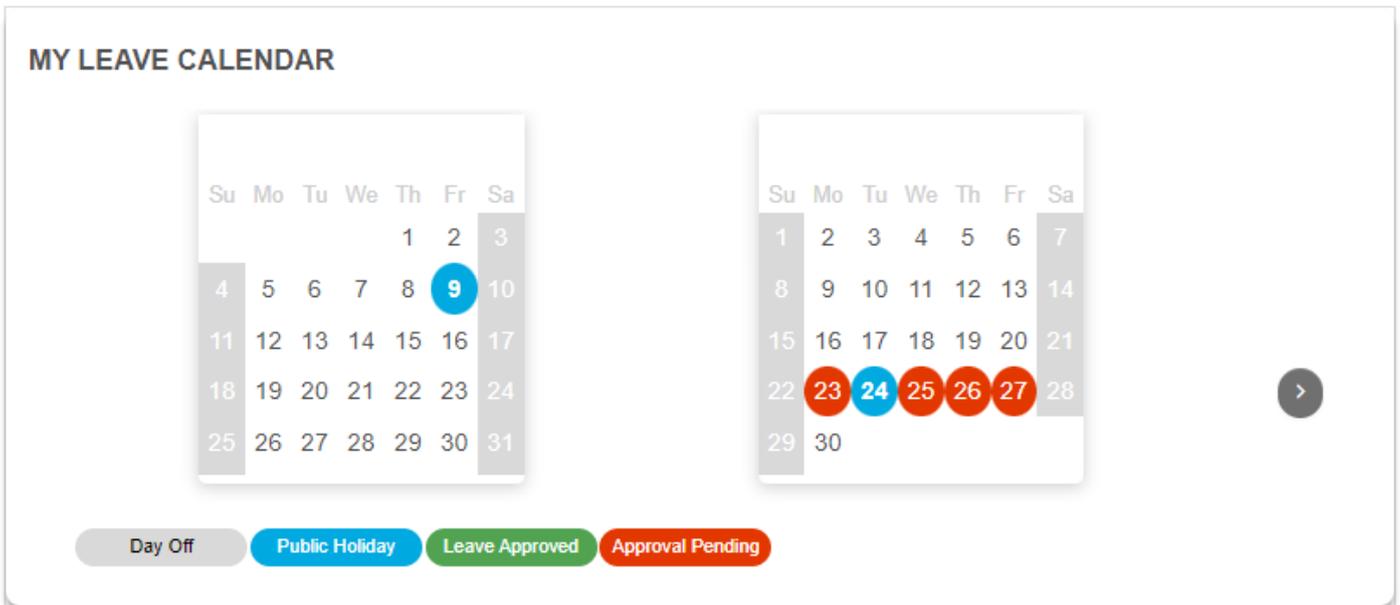
[View Balance Statement/s](#)

#### Leave Requests

Status	Leave Type	Reference	Start Date	End Date	Number of Days	Requested Date
Awaiting Manager Approval	SCH 23 Annual Leave Type	447	2020/11/05	2020/11/05	1.000000	2020/09/22 01:10:25 PM

## 4. My Leave Calendar

A full year calendar is available showing all public holidays and leave that are booked.



## 5. What will my balance be on...

Running future leave in order to see what the leave balance will be on a certain date.

The employee is able to run future leave in order to see what his balance will be on a specified date.

The following search criteria must be completed:

- Leave balances to be calculated for date
- Leave type

What will my balance be on...

Leave Portal » What will my balance be on...

---

Search Hide

Today \*

Leave Balances To Be Calculated For Date \*

Leave Type \*

The search results are displayed as follow:

- Employee information
- Active cycle: *Starting Balance, Cycle Start, Cycle End, Total Entitlement, Pending Changes*
- Future cycle: *Starting Balance, Cycle Start, Cycle End, Total Entitlement, Pending Changes*
- Balance on: *Date that was chosen*

Search
Hide

Today \*

Leave Balances To Be Calculated For Date \*

Leave Type \*

Employee Info			Active Cycle					Future Cycle					Balance On
Employee Number	Full Name	LeaveType	Starting Balance	Cycle Start	Cycle End	Total Entitlement ⓘ	Pending Changes ⓘ	Starting Balance	Cycle Start	Cycle End	Total Entitlement ⓘ	Pending Changes ⓘ	2021/07/01
23Leave4724	Lukhele Aaron	SCH 23 Annual Leave Type	13.83	2020/06/22	2021/04/09	18.47	5.00	5.00	2021/04/10	2022/04/09	23.00	5.75	10.75

A description is provided for the following items:

- *Total Entitlement*: The total amount of leave an employee is entitled to for a specific leave cycle. This amount is determined by the assigned leave group and its configuration.
- *Pending Changes*: The changes that will occur at a future date and is calculated as:  $Accruals + Adjustments - Leave Records + Forfeits$

## 6. Who's on leave

A view to enable an employee to see other employees who is on leave.

An employee is able to see who is on leave per month and day.

Leave Portal > Who's On Leave

ⓘ The active subgroup for your user is Nkngwete IT Solutions. [Click here](#) to change the active subgroup.

7			
Etienne du Toit (etienne.dutoit@signify.co.za)	Unpaid Leave	Full Day	⊙
8			
Etienne du Toit (etienne.dutoit@signify.co.za)	Annual Leave	Full Day	⊙
9			
Etienne du Toit (etienne.dutoit@signify.co.za)	Annual Leave	Full Day	⊙

Image not found or type unknown



---

Revision #5

Created 27 March 2021 22:48:57 by Lizette Lotter

Updated 26 August 2024 10:23:32 by Erika Fourie