Leave Management

Simplify leave processes with tools for requesting, approving, and tracking leave. This feature ensures compliance and transparency while maintaining productivity.

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Chapter 1: Introduction to Leave Management

Discover the purpose of the **Leave Management** module, its key capabilities and how it streamlines leave administration for employees, managers and HR teams.

Overview of Leave Management



Effective leave management keeps records accurate, supports workforce planning, and ensures consistent policy application. The **Leave Management** module simplifies administration, entitlement setup, requests, transactions, and balance tracking within a structured framework.

The module lets administrators set **leave rules** to meet organisational requirements, including how leave accrues, carries over between cycles, and is deducted when taken. These settings define the entitlements and rules for employees in the relevant **leave groups**.

The module provides **employees, managers,** and **administrators** with tools to manage the following:

- **Leave requests:** Submit, review, and manage requests for time away from work.
- **Leave approvals:** Apply configured approval workflows to leave requests.
- **Leave balances:** View available leave entitlements and changes affecting an employee’s balance.
- **Leave configuration:** Define leave types, accrual rules, leave groups, and related settings.
- **Leave processing:** Process leave records, accruals, and adjustments according to the configured rules.
- **Leave records and history:** Maintain records of leave requests and transactions affecting employee leave balances.

A comprehensive solution to manage employee leave, support workforce planning, and ensure consistent application of leave policies across your organisation.



WHAT IT SUPPORTS

Supports a complete leave management process from entitlement to approval and record-keeping.

- Leave types and entitlements
- Leave accruals and leave cycles
- Leave requests and approvals
- Leave balances and adjustments
- Leave groups and employee assignments
- Leave history and transaction records

WHAT ADMINISTRATORS MANAGE

Centralised tools to configure, administer and monitor leave in line with your organisational policies.

- Leave types and leave settings
- Leave groups and employee assignments
- Accrual rules and leave cycles
- Carry-over policies and expiration dates
- Approval hierarchies and multi-tier workflows
- Public holiday groups and blackout dates
- Leave processing and adjustments
- Reporting and audit trails

WHAT EMPLOYEES AND MANAGERS DO



Employees can:

- Submit leave requests
- View leave balances
- View leave history
- Cancel requests (if permitted)



Managers can:

- Review and approve or reject leave requests
- View team leave balances
- View team leave calendars
- Receive notifications and manage approvals

CONNECTED HR ENVIRONMENT

Works with key system components to apply the correct entitlements and calculations.

Employee records
Employee information and assignments

Work schedules
Determines how leave is calculated (e.g. half days)

Leave configurations
Applies leave groups, accrual rules and policies

This chapter provides an overview of the **Leave Management** module, highlighting its **key features**, **purpose,** and **role** in the broader human resources environment. Understanding the module’s core functionality helps users manage leave processes consistently, maintain accurate records, and apply configured leave rules effectively.



Purpose of Leave Management

The **Leave Management** module helps make leave administration simpler by managing the processes and guidelines that support employee time off.

The module enables organisations to:

- Define and manage leave types and entitlements.
- Calculate leave accruals according to configured rules and employee work schedules.
- Allow employees to submit leave requests and monitor their leave balances.
- Enable managers to review and action requests according to configured approval workflows.
- Apply rules for negative balances, carry-over, and leave forfeiture.
- Maintain leave records, adjustments, accruals and historical transactions.
- Manage public holiday calendars for different locations.
- Provide administrators with tools to manage individual employee leave configurations.

Key features of Leave Management

Chapter 2: Roles and Permissions

Understand the responsibilities and permissions of employees, managers and administrators, and how their roles work together to support an effective leave management process.

Chapter 3: Setup and Configuration of Leave Management

Learn how to configure leave groups, leave types, accrual rules, carry-over policies, work schedules and approval workflows to align the module with your organisation’s leave policies and requirements.

Chapter 4: Using the Leave Management module

Learn how to view leave balances, submit and manage leave requests, approve or reject requests, and navigate the everyday workflows available to employees and managers.

Chapter 5: FAQs

Find answers to common and complex questions about using, managing and configuring **Leave Management**, with practical guidance to help resolve issues and troubleshoot unexpected behaviour.

Chapter 6: Glossary

Explore definitions of key terms used throughout the guide to build a clear understanding of leave management concepts, system functionality and configuration terminology.