# Leave Management System

<table>
<thead>
<tr>
<th>Sr.No</th>
<th>Release Date</th>
<th>Release Desc.</th>
<th>Version No.</th>
<th>Released By</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>24-March-08</td>
<td>Leave System</td>
<td>1.0</td>
<td>PyramidCore Team JC, Bhanu and Uma</td>
</tr>
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**Leave System**

The **objective** of Leave System is to automate Leave management. With the help of this system users can apply leave online, supervisors can approve or escalate to higher levels, and HR can update leave status online.

The users can see the status of all Leave Transactions and their Leave Balances from this system. Admin can manage all Leave Transactions with the help of this system.

The work flow is designed in such a way the Leave System generates email messages as alerts to respective users, supervisors and to HR to enable them to act upon.

Raise Help Desk Ticket on PyramidCore in case you face any technical issues. Alternately you can contact the following people in case you face problems:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Ext No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jagdish Chandra</td>
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<td>181</td>
</tr>
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Part – I USER VIEW

Users have three Menu Options in Leave Module.

a) Apply  
b) Leave Transaction  
c) List

Apply:

- Click on Leave  →  Apply
- Fill all Mandatory & other fields as required.
- Fill-in Leave details (Leave balances are available top right hand side)
- Click on Add
- Click on Edit Button and Update the same in case you want to make changes, if any.
- Click on the ‘Send’ Button for forwarding your leave application to your immediate Supervisor.
- The message “Leave Application has been forwarded to Supervisor” is displayed.
- System generates email, which is sent to your supervisor.
Leave Transaction:

Click on Leave → Leave Transaction

Here Users can see

- All Leave (Leave Transactions) availed till date.
- Balance Leave.
List:

Click on Leave → List

Here Users have 3 tabs

a) **Pending** Tab
b) **Approved** Tab
c) **Applied** Tab

a) **Pending Tab**: Click on Leave → List → Pending Tab

- You as Supervisor can see all leave transactions applied by users reporting to you.
- Click on Application No
- After clicking on Application No. New window appears as shown below.
• Fill up Remark, which is mandatory.
• Click one of the following three buttons.
  1. **Send HR**: Click in case you **approve** the leave.
  2. **Send Back**: Click in case you **reject** the leave.
  3. **Send Supervisor**: click in case you want to **escalate** to your supervisor.
• In each of the above options, email is automatically sent to the respective users and leave transaction moves to “Approved” Tab.

b) **Approved Tab**: Click on Leave ➔ List ➔ Approved Tab

• Here you can see all the Leave Transactions, which were approved by you as supervisor.

c) **Applied Tab**: Click on Leave ➔ List ➔ Applied Tab

• Here you can see your own applications / transactions.
Part – II ADMIN VIEW

Admin has following Menu Options in Leave Module.

a) Presets
   • Unit
   • Status
   • Leave Type
b) Leave View
c) Apply
d) Leave Transaction
e) List

a) Presets: Unit: Click on Leave Æ Presets Æ Unit

Four Types of Leave units are available
1. Annual
2. Monthly
3. Once
4. Twice
a) Presets: Status: Click on Leave → Presets → Status

- Admin can see balance Leave of the employees
- Admin can use this feature in entering leave balances of employees through this screen. Typically the leave balances are entered in the beginning of a calendar year.
a) Presets: Leave Type: Click on Leave → Presets → Leave Type

- Admin can use this feature in entering all leave types, as per company leave policy.
- The eligibility of each type of leave is entered such as EL is eligible to new joiners after completion of six months.
- No. of units denote the units available to employees for availing leave.
b) Leave View: Click on Leave → Leave View

- Here Admin can see Leave transactions taken place by all employees.
- Admin can see all the leave transactions taken place by Branch wise and Department Wise.
- Export To Excel tab can facilitate to export the leave transactions to Excel Sheet.

c) Apply: Click on Leave → Leave Apply

- This is already explained in Part-I USER VIEW

d) Leave Transaction: Click on Leave → Leave Transaction

- This is already explained in Part-I USER VIEW
e) **List: Click on Leave → List**

Here Admin has 3 tabs

- **I. Pending Tab**
- **II. Approved Tab**
- **III. Applied Tab**

### I. Pending Tab: Click on Leave → List → Pending Tab

- Admin can see all leave applications/transactions applied by users.
- Click on Application No.
- After clicking on Application No. A new window appears as shown below.
Admin has to fill Remarks, which is mandatory.
Admin has 2 options
  Approve: Click on ‘Approve’ Button in case you approve the leave.
  Reject: Click on ‘Reject’ Button in case you reject the leave.
In each of the above options, email is automatically sent to the users who applied leave and his supervisor.
Leave Status is updated on click of Approve Button.

II. Approved Tab: Click on Leave ➔ List ➔ Approved Tab
  This is already explained in Part-I USER VIEW

III. Applied Tab: Click on Leave ➔ List ➔ Applied Tab
  This is already explained in Part-I USER VIEW