Configuration of Leave Management System for National Institute of Educational Planning and Administration (NIEPA)

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Prerequisites

Following configurations need to be done before initiating the leave management module:
- Employee details
- Configuration of user roles

Roles in Leave Management System

Roles of Leave Management System		
S.No	Names	Responsibility
1	leave_admin	Employee/Administrative post, an employee who handles all leave records in the university.
2	leave_admin_view	Administrative post, any administrative employee who is supervising all leave records in the university.
3	leave_employee	Employees post all employees in the University.
4	leave_recommending_authority	Administrative post any administrative employee who recommends the leave application of the employees.
5	leave_reviewing_authority	Administrative post any administrative employee who reviews the leave application of the employees.
6	leave_sanction_authority	Administrative post any administrative employee who sanctions the leave application of the employees.

Step 1: Leave Settings:

Leave_admin can do the configuration of leave settings by following the below-mentioned steps:

Settings

Name	Action
Leaves	⚙
Authorities	⚙
Leave Type	⚙
Employee Leave Mapping	⚙
Leave Account	⚙
Leave Ledger	⚙
Assign Authorities to Employees	⚙
Compensatory Leaves	⚙
Holidays	⚙
Import Leaves	⚙
Leave Configuration	⚙

LTC Configuration	⚙
Employee Week-off	⚙
Leave LTC Travel Mode	⚙
Leave LTC Block Period Settings	⚙
Leave LTC Approval Settings	⚙
LTC Allowed Country Settings	⚙
Leave PDF Template	⚙
Special leave rules	⚙
Add Post Facto Leave	⚙

Custom mail Template	⚙

Step 1.1 Add New Leaves

By clicking on the action button of Leaves, the admin can add a new leave type one by one by adding the following details:

Name: Earn Leave/Casual Leave/Half Pay Leave

Short Code: EL/CL/HPL

Status: Active/Inactive

Kind: Select option from the dropdown

LTC Applicable: Yes/No

Do you want to send a sanction letter at the time of Sanction Leave?: Yes/No

Step 1.2 Authorities

Here, *Leave_admin* can assign the Authorities and update the authorities one by one.

Step 1.3 Leave Type

Here, *Leave_admin* can add all the following leave types by clicking on the **action** button:
- Teaching,
- Non-teaching
- Pwd,
- Non-Pwd)

Leave_admin can assign them to all the following authorities
- Recommended
- Review
- Sanction Authority

Step 1.4. Employee Leave Mapping

Here the ***Leave_admin*** can update the status and use it to change the flag in employee leave mapping.
The flag decides whether the default workflow will be followed for the employee or custom added authorities workflow will be followed for the employee specified in add authorities to the employee.
Leave_admin can assign leave to employees, select the employee from the given list by clicking on the checkbox. Click on the **bulk assign** button prompting you to choose the leaves assigned to the selected employees.

Step 1.5 Leave Account

Here ***Leave_admin*** can add all leaves in the employee Leave Account and add fill in the leaves details one by one also. We can see all leave record likes; Leaves, Years, Opening leave balance, Closing balance, Current balance, etc.

Step 1.6 Leave ledger

Here ***Leave_admin*** can view all leaves' actual debits and credits and shows their current balances and ledger records classified and summarized for financial information.

It helps employers showcase their actual monthly leave credit as per rules & leave type with utmost transparency; further, it even shows the consumption of leaves by the employees.

Step 1.7 Assign Authorities to Employees

Here the ***Leave_admin*** can assign authority to all employees one by one.

If we assign authority to all the employees, then they will select and click on bulk assign and fill in the details:-

Leaves:

Recommending Authority: The authority will recommend the leaves and respond to the note added by the higher authority.

Review Authority: The authority who will review the leaves and will respond to the note added by the higher authority.

Sanction Authority: The authority who will sanction the leaves.

Step 1.8 Compensatory Leaves

Here the *Leave_admin* can view/add all employees working overtime; that is, it is taken as a leave(time off), working extra on a working day, weekly off, and a holiday.

Step 1.9 Holidays

Here *Leave_admin* can view prefixes and suffixes.

Suppose, If an employee has applied for LEAVE and just before the LEAVE dates there has been a holiday, in that case, the applicant/employee will get any privilege of the week off or holidays is configured here. They will add holiday details to click on **Assign Compensatory Leaves** and fill in the required details.

Step 1.10 Import Leaves

Here the *Leave_admin* can bulk import the leave balance of the employees. The **leave_admin** can download the excel format and fill in the leave balance details and can upload the file.

Step 1.11 Leave Configuration

Here *Leave_admin* can choose the different types of leaves options that are applicable in the University. The **leave_admin** can also mention the maximum limit and maximum leaves at a time, and set assigned duties are required or not (this will work for every employee) after this admin can select the designation where assigned duties are not required. admin can select change assigned duties authority (recommending, sanction) from given option, admin can set send reminder email frequency in hr.(once a reminder is sent from the admin again it can be sent after frequency manually).

Step 1.12 Employee Week-off

Here **Leave_admin** has the option to map the week-off for all employees.

Step 1.13 Special Leave Rules

Here *Leave_admin* can configure special leave rules for a particular leave. If these special leave rules are specified for any leave, then the special leave rules will be utilized while calculating the number of leaves credited to the employee during the next credit cycle of that leave.

If **leave_Admin** needs to add a new Special Leave Rule to click on Add New Rule and fill in the required details.

Step 1.14 Add Post Facto Leave

Here *Leave_admin* can add a Post Facto Leave on behalf of an employee who needs no further approval.

Step 1.15 Custom Mail Templates

Here the *Leave_admin* can view/add a new custom Mail Template for Sanction Mail, Rejoining mail, Mail to Authority. If not specified, then the default mail templates of the system will be used.

Modules Acceptance Form

University/HEI Name :
Name of the module:
Demonstration and training date :
URL of Portal:
Deliverables:

S.No.	Deliverables	(Yes/No)
1	Demo provided (through web Conferencing/Face to Face)	
2	Link to Admin User Manual provided	
3	Admin access provided	
4	Settings configured	
5	Complete Testing	
7	Usage started of the module	

Comments (If any): _____
Acknowledgement/Document Signatories:

Admin/s	Admin Username in Samarth	Admin Signature
Name Designation Department		
Name Designation Department		

By Signing off this document, I acknowledge that training and handholding* of _____ (Name of the module) has been provided by Team Samarth in _____ (Name of the University/HEI) and that the University/HEI hereby provides acceptance of the system on _____ (Date of acceptance)		
Nodal Officer		

	Signature with Name	dd//mm/yyyy
Competent Authority	Signature with Name	dd//mm/yyyy

Instructions

1. Each change submitted by the University after acceptance will take a minimum of 2 weeks to reflect in the portal.