

Leave Management System (LMS)

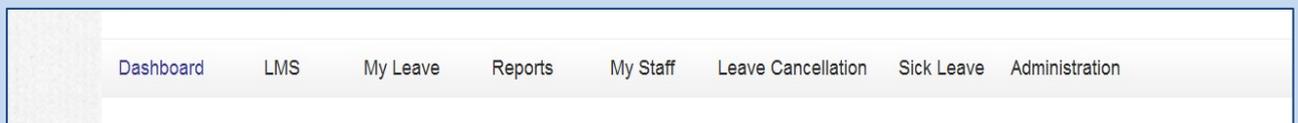
Our Leave Management System allows:

- Annual leave to be requested and cancelled
- Annual leave to be approved by managers
- The automatic calculation of remaining holiday allowance

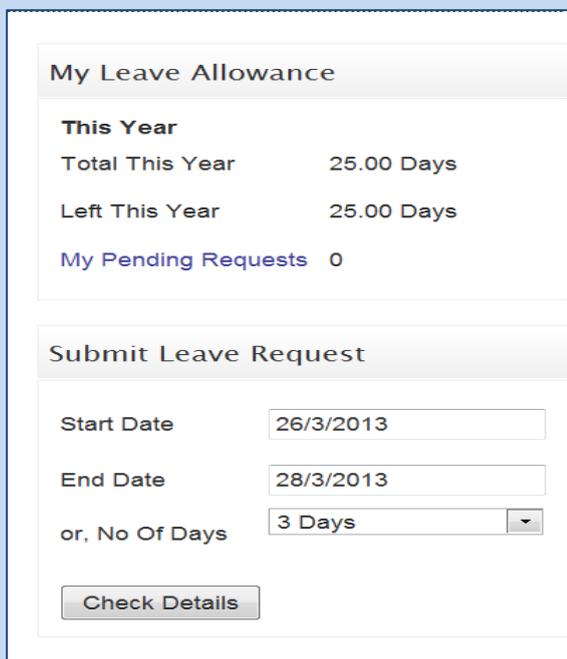
Information for Users

Requesting holiday:

Log in using the username and password which has been emailed, you will be directed straight to the Dashboard:



On the Dashboard annual leave can be submitted using the Submit Leave Request form:



The screenshot shows two sections of the LMS interface. The top section is titled 'My Leave Allowance' and contains the following information:

This Year	
Total This Year	25.00 Days
Left This Year	25.00 Days
My Pending Requests	0

The bottom section is titled 'Submit Leave Request' and contains the following form fields:

Start Date:

End Date:

or, No Of Days:

Under My Leave Allowance, the holiday allocation for the year is displayed and the remaining holiday for the year. Any requests that are pending with the manager are also displayed.

When requesting the holiday, select the relevant start and end dates and this will automatically calculate the total number of working days. Click Check Details which will allow a note to be added to the request (alternatively this can be left blank):

This Year	
Total This Year	25.00 Days
Left This Year	25.00 Days
My Pending Requests	0

Submit Leave Request	
Please check and confirm the following:3 days will be removed from your account on approval.	
Leave Type	Annual Leave
Start Date	26/3/2013
End Date	28/3/2013
Days	3 Days
Working DAYS	3
Allowance DAYS	3
Notes	I am planning on going on holiday between these dates
<input type="button" value="Edit"/> <input type="button" value="Confirm"/>	

Check the dates selected and click Confirm.

The approver will then be sent an email to confirm they have a pending holiday request to approve. Once this has been approved or rejected by the final approver (in some cases this may be the second level approver); an email will be sent to confirm this.

Once the email has been received, log in, go to My Leave and the holiday request will be displayed (and whether or not it has been approved or declined):

The screenshot shows the 'My Leave' page in the Project People LMS. At the top, the logo 'project people putting thought together' is visible, along with the user 'testuser@projectpeople.com' and navigation links for 'My Details / Settings' and 'Sign Out'. Below the navigation bar, there are tabs for 'Dashboard', 'LMS', and 'My Leave'. The main content area is titled 'My Approved / Pending Leave'. It includes a 'View Yearly Calendar' section with filters for 'From' (01/01/2013), 'To' (31/12/2013), 'This Year', and 'Include Pending Leave'. Summary statistics show 'Total this year 25.00' and 'Left this year 22.00'. A table below lists leave requests with columns: From, To, Working, Allowance, Details, Approval Note, Status, Pending From, Leave Type, and Options. One request is shown for the period 26/03/2013 to 28/03/2013, with 3.00 working days, 3.00 allowance, and an approval note from [joanna.stevens@projectpeople.com]. The status is 'Approved', and the leave type is 'Annual Leave'. A 'Cancel' button is present in the options column.

It has been approved, this will also be updated on the Leave Allowance on the Dash Board:

The screenshot shows the 'My Leave Allowance' section, which displays the following information:

- This Year**
- Total This Year: 25.00 Days
- Left This Year: 22.00 Days
- My Pending Requests: 0

Below this is the 'Submit Leave Request' section, which contains the following form fields:

- Start Date: 15/3/2013
- End Date: 14/3/2013
- or, No Of Days: --Select--

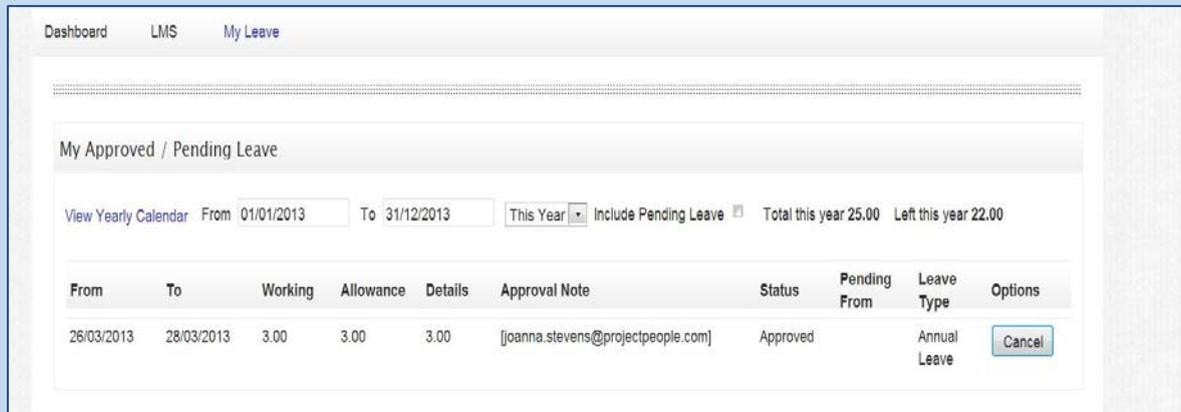
A 'Check Details' button is located at the bottom of the form.

Cancelling Holiday

There are various stages at which you can cancel any leave (Future and past):

- Before it has been approved by first approver
- Once it has been approved by first approver and before it reaches the second approver
- Once it has been approved by the second approver

To cancel any leave, go to My leave on the top toolbar. All previously requested leave will then be displayed:



To cancel, please click the Cancel button.

For approvers the following actions will need to be taken for the below three options.

Before it has been approved by first approver

No action is required by the approver.

Once it has been approved by first approver and is with the second approver

As this holiday request has not been confirmed, no further action by the approver is required.

Once it has been approved by the second approver

The only action required will be that of the final approver who will receive an email to approve the cancellation.

The holiday will then be removed from My Leave:

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Signed in as testuser@projectpeople.com My Details / Settings Sign Out

Dashboard LMS My Leave

My Approved / Pending Leave

View Yearly Calendar From 01/01/2013 To 31/12/2013 This Year Include Pending Leave Total this year 25.00 Left this year 25.00

There are no staff members reportedly off today.

This cancelled holiday will then be added to the annual leave entitlement on the Leave Allowance on the Dash Board:

My Leave Allowance

This Year

Total This Year	25.00 Days
Left This Year	25.00 Days

My Pending Requests 0

Submit Leave Request

Start Date 15/3/2013

End Date 14/3/2013

or, No Of Days --Select--

Check Details

Please note past leave is also able to be cancelled if it was not taken.

[Information for Approvers](#)

Approving and Cancelling Leave

Once an employee requests a period of leave, the first level approver will receive an email alerting them to this with a link to the request. The link will then prompt the login details to be entered and will then bring up the request:

Dashboard LMS My Leave Reports My Staff Leave Cancellation Sick Leave Administration

Pending Leave Request Details

[View Diary](#) [View Staff Member's yearly Calendar](#)

Staff Details		Staff Allowances	
Staff Member	Test User	Opening balance for year	25.00
Department	Sales	Remaining balance for year	25.00DAYS (does not include time from this pending request, if applicable)

Leave Details		Leave Request Notes (from Staff Member)	
Leave Type	Holiday / Vacation	Leave Request Notes (from Staff Member)	
From	27/03/2013	Approver Note	
To	28/03/2013		
Days	2 Days		
Working DAYS	2.00		
Allowance DAYS	2.00		
Free Days	0.00		
Non working Days	0.00		
Requested on	26/03/2013		

Process Request

Decision:

Approver Notes:

These notes appear on your approved / declined message

The approver can then choose to accept or decline the request:

Process Request

Decision:

Approver:

These notes appear on your approved / declined message

If this has been approved, the second level approver will then receive the same email prompting them to login and either approve or decline the request.

Dashboard

All pending leave requests for employees will appear on the Dashboard of the approver- this would be an alternative method of approval if emails are missed.

Recording Sick Leave

To record sick leave, click on the Sick Leave option and click Sick Leave:



Then use the form on the right and begin typing the employees email address:

Request Form

Emp. Email :

Total this year :

Left this year :

Leave Type :

Start Date :

End Date :

Or, No of days :

Approver :

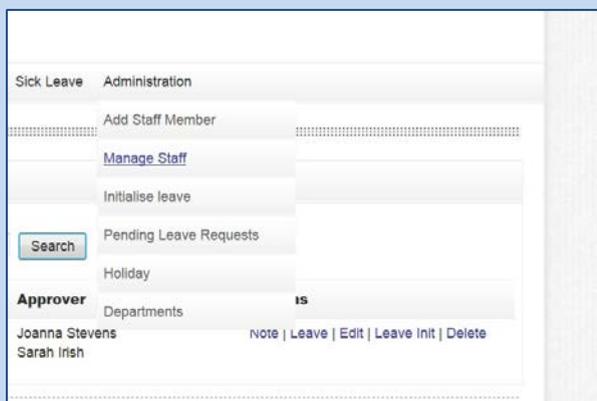
Note :

All details will then need to be entered before clicking Submit.

Converting sick leave

There is an option for a final approver to convert sick leave to holiday. This can be found by clicking Sick Leave and then Convert Sick Leave:

Find the appropriate sick leave to convert, click Convert. This allocation will then be removed from the employee's holiday entitlement.



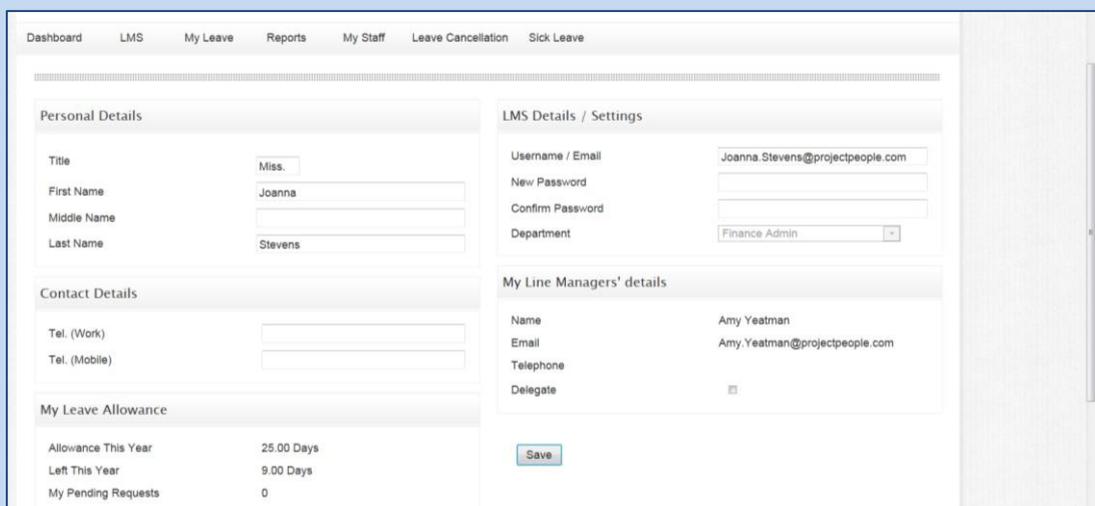
Delegate Authority to an Alternative Approver

As an approver, it is possible to delegate any of your responsibilities to an alternate user whilst you are on holiday (this will be your first level approver).

Click on my details/settings on the top corner.



The following page will then appear:

A screenshot of the "My Details / Settings" page in the LMS. The page has a navigation menu at the top with items: Dashboard, LMS, My Leave, Reports, My Staff, Leave Cancellation, and Sick Leave. The main content area is divided into several sections: "Personal Details" with fields for Title (Miss.), First Name (Joanna), Middle Name, Last Name (Stevens), "Contact Details" with fields for Tel. (Work) and Tel. (Mobile), "My Leave Allowance" with a table showing "Allowance This Year" (25.00 Days), "Left This Year" (9.00 Days), and "My Pending Requests" (0). The "LMS Details / Settings" section includes fields for Username / Email (Joanna.Stevens@projectpeople.com), New Password, Confirm Password, and Department (Finance Admin). The "My Line Managers' details" section shows Name (Amy Yeatman), Email (Amy.Yeatman@projectpeople.com), Telephone, and a "Delegate" checkbox. A "Save" button is located at the bottom of the LMS Details section.

Click Delegate, on your return remove tick.

Help

If you require any help with using the Leave Management System, please contact Srinivas.murthy@projectpeople.com