

# Leave Management

How to manage leave transactions and balances

## Navigation Path

To access the Leave parameter screen:















- Click on **Config**
- Go to **Human Resources**
- Go to **Leave Scheme Parameters**

## Leave Scheme Parameters

Capture the required details and then click on **Save**

### Company Leave Scheme Parameters

Details
[Click here to view audit trail](#)

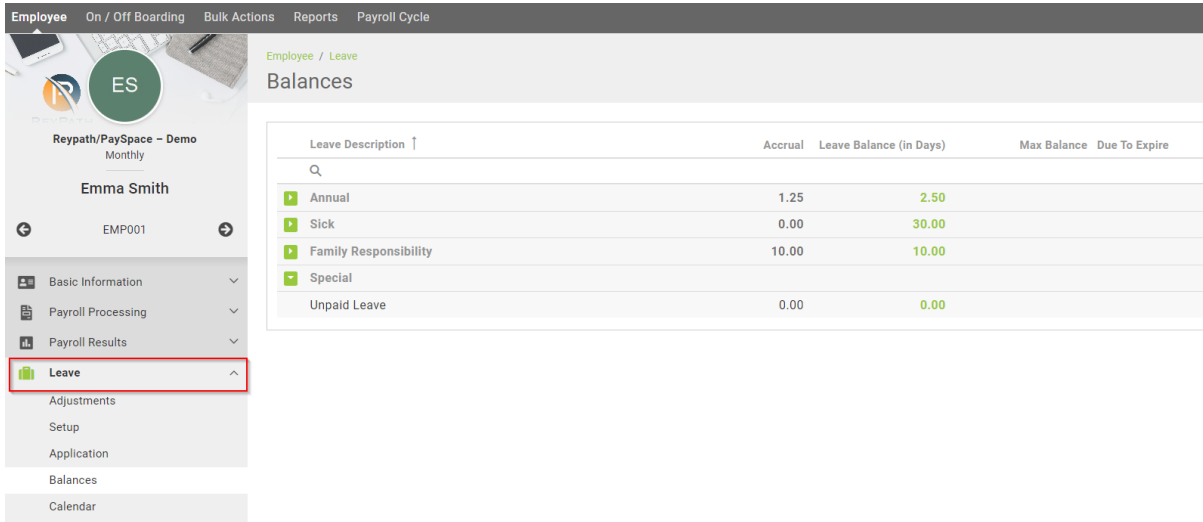
* leave scheme:	--select one--	 
* effective date:	4 October 2022 	 
* leave type:	--select one--	 
* leave description:		
* stipulate the order in which leave is taken for this leave type:		
is length of service or grade bands applicable for this leave type?	<input type="checkbox"/> length of service <input type="checkbox"/> grade bands	 
* this leave type accrues at:	<input type="text"/> --select or v per <input type="text"/> --select one v <input checked="" type="radio"/> Accumulative <input type="radio"/> Non-Accumulative	
+ advanced options		 

Field:	Description:
Leave Scheme:	Select from the dropdown list what leave scheme this leave type is linked
Effective date:	It is important to capture an effective date, prior to when the first employee was linked to this leave scheme.
Leave type:	Select from the dropdown list the leave type
Leave description:	Type in the description of the leave type for example: Annual Leave
Stipulate the order:	If you have more than one leave line under a leave type, select the order in which leave line must be taken first
This leave type accrues at:	Select how many days/hours the leave type must accrue per year/day/month

## Employee Leave Screen

To access the employee leave screen:

- Select an Employee
- Go to the leave menu option left of the screen



The screenshot shows the 'Employee / Leave Balances' screen for Emma Smith (EMP001). The sidebar menu on the left includes options like Basic Information, Payroll Processing, Payroll Results, Leave (highlighted with a red box), Adjustments, Setup, Application, Balances, and Calendar. The main content area displays a table of leave balances.

Leave Description	Accrual	Leave Balance (in Days)	Max Balance	Due To Expire
Annual	1.25	2.50		
Sick	0.00	30.00		
Family Responsibility	10.00	10.00		
Special				
Unpaid Leave	0.00	0.00		

### Menu Option: Description:

Adjustments: Select a specific leave type and adjust the leave type by a no. of days/hours

Setup: Link the employee to a leave scheme

Application: Capture a transaction on a behalf of an employee

Balances: View the leave type and balances linked to the employee

Calendar: View the leave taken on a calendar screen