



DataByte
DYNAMIC SOLUTIONS

LEAVE MANAGEMENT SYSTEM USER GUIDE

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Welcome !

This user guide will help you get started with **DataByte Leave™**, our Leave Management system module which lives within **DataByte Fusion™**.

More information about Fusion, can be found on a document available for download [here](#).

DataByte Leave™ forms part of **DataByte WorkForce™**, a suite of HR Management and Front Desk software which comprises of our fully integrated [Payroll](#), [Time & Attendance](#) and [Visitor Management](#). Learn more about **DataByte WorkForce™** [here](#).

We hope you like **DataByte Leave™** and please feel free to contact us via email on support@databyte.com.mt.

Regards

The DataByte Team

Configuration

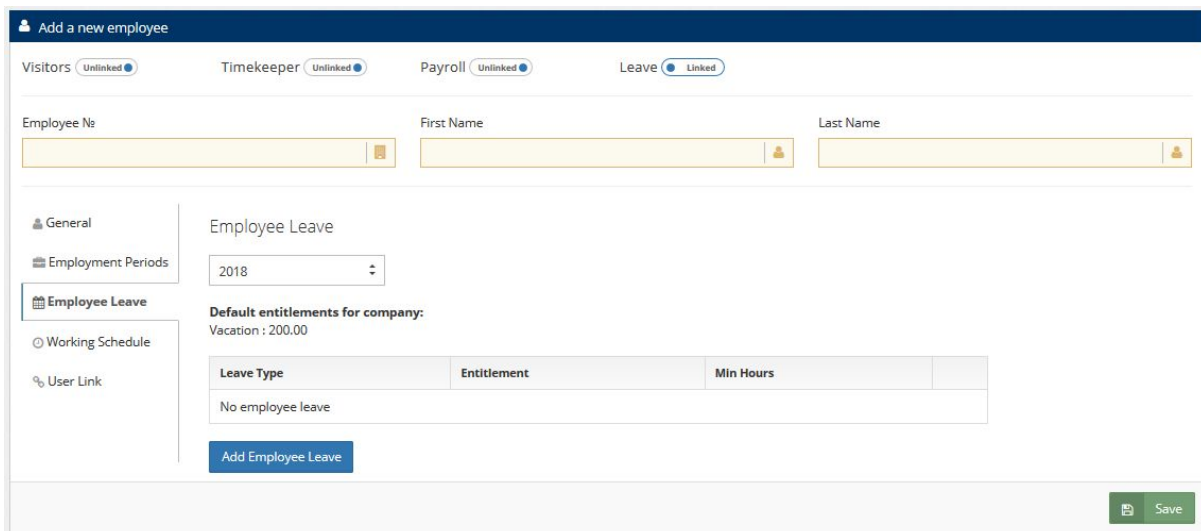
After [setting up your Fusion account](#), select **'Maintain Product'** for DataByte Leave™ on the Fusion Dashboard.



You can now provide yourself with **Administrator** access that will allow you full privileges within the system.

Setting up Employees

The first step to enrolling employees for Leave is to create employees in the system, this can be done by clicking 'Manage Employees', followed by 'Add Employee'. Should you already have employees listed and wish to link them to DataByte Leave™, simply click the toggle switch labelled 'Leave' and click 'Save'.



The screenshot shows the "Add a new employee" form. At the top, there are tabs for "Visitors (Unlinked)", "Timekeeper (Unlinked)", "Payroll (Unlinked)", and "Leave (Linked)". Below the tabs, there are input fields for "Employee No", "First Name", and "Last Name". On the left side, there is a sidebar with menu items: "General", "Employment Periods", "Employee Leave", "Working Schedule", and "User Link". The "Employee Leave" section is active, showing "Employee Leave" with a dropdown menu set to "2018". Below that, it says "Default entitlements for company: Vacation : 200.00". There is a table with columns "Leave Type", "Entitlement", and "Min Hours". The table currently has one row with "No employee leave". At the bottom of the form, there is a blue button "Add Employee Leave" and a green "Save" button.

Setting up User Accounts

User accounts can be setup for DataByte Leave™ which will allow employees to be able to request Leave. This can be achieved by clicking 'Manage Users', followed by 'Add User' or 'Invite User'. The Add User facility allows you to create a user account by providing a Name, Surname, Email address and Password. The Invite User facility allows for a user

to be created with just a Name, Surname and Email address. Upon adding or inviting a user, they will receive an email notification with instructions on finalising their account setup. After user accounts have been created, the Fusion Administrator would need to log in to Fusion and set user access for DataByte Leave™ by clicking 'Maintain Product' on the DataByte Leave™ product box and by selecting privileges.

What are the different levels of access in DataByte Leave™?

Administrators have full access to DataByte Leave™. They can:

- Request Leave on behalf of any employee listed within the system as well as see Leave Entitlements for each employee
- Approve or reject Leave requested by any employee listed within the system
- See all Leave Bookings
- Add and create different Leave Entitlements and assign them to employees
- Select Stop Leave Periods for the whole company or different teams and departments
- Set Team request limits
- Generate Reports
- Close Leave Types for the year.

Users are allowed access to:

- Request Leave on their own behalf
- See their own Leave Entitlements for the year
- See all Leave Bookings.

Approvers have access to:

- Request Leave on behalf of any employee listed within their department or team as well as see Leave Entitlements for each employee listed within their department or team
- Approve or reject Leave requested by any employee listed within their department or team (as well as receive email notifications when a leave request is made)
- See all Leave Bookings.

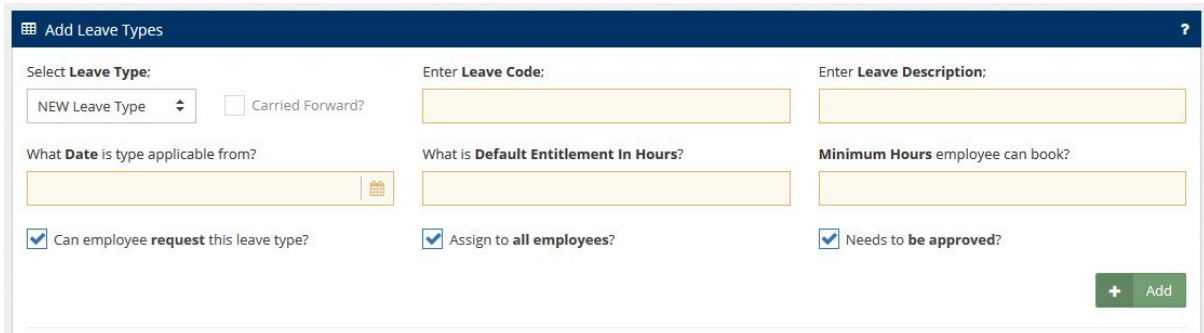
HR have access to:

- Request Leave on their own behalf
- Add and create different Leave Entitlements and assign them to employees
- Select Stop Leave Periods for the whole company or different teams and departments
- Set Team request limits
- See all Leave Bookings
- Generate Reports
- Close Leave Types for the year.

Yearly processes

Starting off a new year

At the beginning of the year, the main action for the administrator of Leave would be to provide all employees with their Leave Entitlements accordingly. These can be setup from **Setup > Leave Types** when in DataByte Leave™.



A number of Leave Types are already available in the 'Select **Leave Type**;' drop down menu, however the option is also available to create additional Leave Types if needed. The Leave Types available do not require a Leave Code or Description when being set up, however they would require a Date that the Leave is applicable from, a default entitlement in hours and a minimum amount of hours an employee can book.

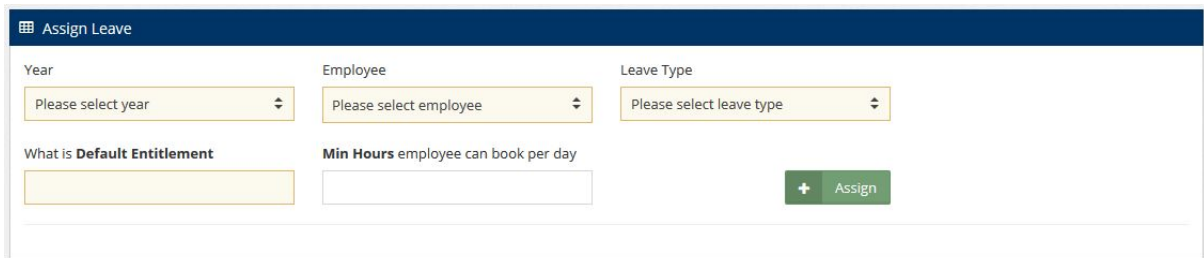
Further to these options, DataByte Leave™ also allows for:

- Certain Leave Types to not be requested by employees
- Assigning of Leave Types to all employees
- The option for Leave Types not requiring approval

Assigning Leave

Aside from the '**Leave Types**' section, Employee Leave can also be assigned from **Setup > Employee Leave**. This can be done by actioning the following and clicking the '**Assign**' button once ready:

- Selecting the year, employee and Leave Type
- Listing default entitlement in hours and minimum hours that an employee can book per day.



Setting Stop Leave Periods

Stop Leave Periods may be setup from **Setup > Stop Leave Period**. Setting a Stop Leave Period would appear on the Leave Calendar showing employees that it is not possible to take Vacation Leave during that period.

Stop Leave Period

Stop Leave **valid for:** Input **name of stop leave period:**

Stop Leave **effective between:** **and:** + Add

Name	Effective between	Valid for		
Migration	26/06/2017 and 30/06/2017	Whole Company	Edit	Delete

To apply Stop Leave, simply set who the Stop Leave is valid for (this can be set for the whole company or different departments), input a name for the Stop Leave Period, set to and from dates for the Stop Leave and finally click the 'Add' button. Below the area where the Stop Leave can be set, you will see any Stop Leave Periods that have already been set.

Setting Team Request Limit

DataByte Leave™ allows for limits on leave requests to be set within teams to ensure that you always have the minimum staff needed for your business to continue running smoothly.

Limit Team Requests

Select **Leave Year** Select **Team:** Enter **Number Of Employees:** + Add

You are currently viewing **team requests limit** for year 2018;

No records found!

Team request limits can be set from **Setup > Team Request Limit** within the Leave module.

This can be done by selecting the year and Team, inserting the maximum number of Employees who are allowed to take leave at any given period, followed by a click of the **'Add'** button.

End of Year Process

Close leave types for the year

Select what you want to do with remaining leave at the end of the year. Remaining leave can either be carried forward to the following year or converted as pay in the next payslip.
NB: Once a leave type is closed, users cannot do any more requests, and changes cannot be reverted.

Year to process

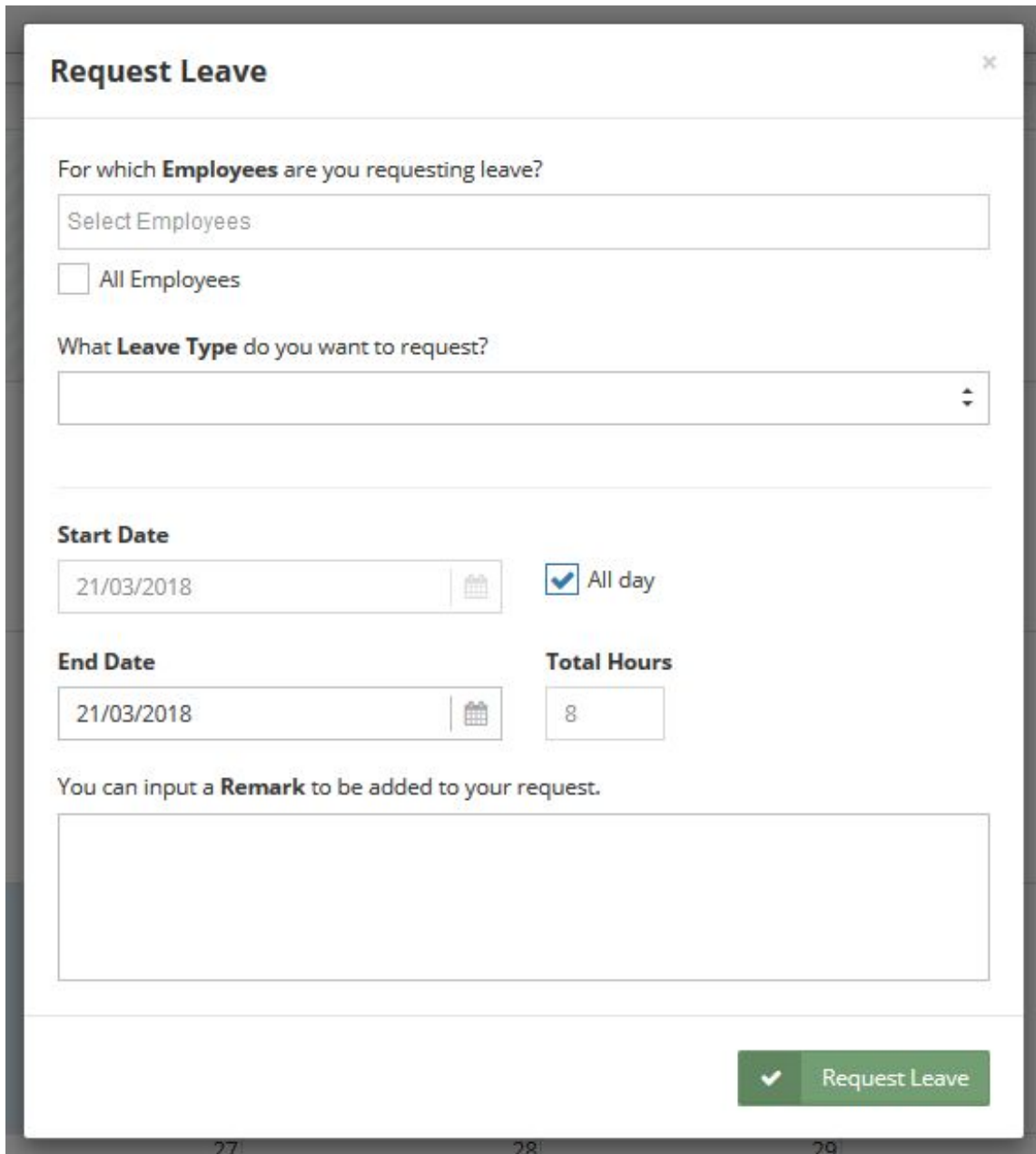
Vacation (19 Employees) v

At the end of the year, this system allows for any remaining leave to be carried forward to the next year or paid to the employee. As some companies have a limit on how much leave can be carried forward or paid, there is the option to include an Hours Limit for

each employee when finalising leave for the year. To end the year, simply check the boxes for Carry Forward or Pay, include an Hours Limit if any, and click the **'Save'** button on the bottom of the page.

Submitting a Leave Request for an Employee

Leave Requests can be made for Employees by accessing the **'Leave Calendar'** within the left hand side menu of DataByte Leave™. Once on the page, select a day for the Leave Entry and you will be presented with the lightbox shown below. Once filled in and submitted, you may proceed to approve the Leave for the employee by clicking on the calendar entry, unless there is an approver for the employee.



Request Leave ✕

For which **Employees** are you requesting leave?

Select Employees

All Employees

What **Leave Type** do you want to request?

Start Date: 21/03/2018 All day

End Date: 21/03/2018 **Total Hours**: 8

You can input a **Remark** to be added to your request.

Request Leave

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Approving Leave

Leave approvals or rejections can be made by accessing the **'Approval List'** within the left hand side menu of DataByte Leave™. Once on the page, click the checkboxes next to each name and click the approve or reject buttons accordingly.

Leave Approval List						
	Employee	Hours Requested	Type	Status	Date Requested	Requested On
<input type="checkbox"/>	Karolina Obara	8.00	Maternity	Waiting approval	31/10/2017	30/10/2017
<input type="checkbox"/>	Karolina Obara	8.00	Maternity	Waiting approval	01/11/2017	30/10/2017
<input type="checkbox"/>	Karolina Obara	8.00	Maternity	Waiting approval	02/11/2017	30/10/2017
<input type="checkbox"/>	Karolina Obara	8.00	Maternity	Waiting approval	03/11/2017	30/10/2017

Leave approvals or rejections can also be made by accessing the **'Leave Calendar'** within the left hand side menu of DataByte Leave™. Once on the page, select the Leave Entry and click the approve or reject buttons accordingly.

Leave Details ✕

Employee <input type="text" value="Caroline Herrera"/>	Leave Type <input type="text" value="Vacation 2018"/>
Date Requested <input type="text" value="21 Mar 2018"/>	Requested On <input type="text" value="20 Mar 2018"/>
Remark <input style="width: 100%; height: 60px;" type="text" value="Remark..."/>	
Available Balance <input type="text" value="186.25"/>	
Approval Remark <input style="width: 100%; height: 60px;" type="text" value="Approval Remarks..."/>	

Leave Reports

2 reports are available within the DataByte Leave™:

- **Leave Report:** Which allows for filtering by Date, Leave Type, Team, Employee and Approval Status
- **Monthly Report:** Which allows for filtering by Year, Leave Type, Departments, Team, and Employees

Leave Home Screen

With DataByte Leave™, you can quickly take a glance at your vacation leave status, Pending leave requests and Remaining Employee Leave Balances by clicking on the 'Home' item in the left hand side menu.