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## Amendment History

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<td>August, 2017</td>
<td>5.7.7</td>
<td>Admin Manual</td>
<td>eOffice Project Division</td>
</tr>
<tr>
<td>February, 2018</td>
<td>5.8</td>
<td>Admin Manual</td>
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Introduction

The manual system requires an employee to manually fill the leave-request form and submit it to their Reporting/Controlling/Approving authority. After the approval from forwarding authority, request sometimes moves up to three channels i.e., approving and controlling, which later submitted to the Admin/Establishment section of a department for sanctioning. The department’s Admin/Establishment section currently maintains employee leave records in registers or local system depending on the individual department. The complete process takes time and after following the cumbersome practice data discrepancy remains in many cases.

Also, the manual system is limited to the geographical boundaries, as the process does not provide the convenience to apply and approve leave anywhere and anytime.

Therefore, the present system requires an automated system which will provide a quick and efficient validation system.
**Objective**

The primary objective of Leave Management System is to ensure a centralized system for the maintenance of leave records. Leave management system (eLeave) application allows creating, monitoring, and routing of the leave applications from the user to the Reporting/Controlling/Approving authority of the department and to the Administrator/Establishment of the department. The Leave Management System application enables the user to

- Submit leave requests online
- Check their leave balances
- Generate various types of report at every level
- View the status of the requested leave anytime.

Also, enabling the Reporting /Controlling/Approving authority to approve leave requests online. The application calculates and maintains balances of each type of leave and gives administrators the ability to review, edit and sanction leave. Thus, the application simplifies the leave process, makes it more maintainable, standardizes the processing and lowers the amount of data maintenance and verification activities.
Leave Management System

To start using Leave Management System application, log into the portal and follow the below steps:

Login

- Enter the Username and Password in eOffice portal, as shown in Fig.1:

![Login Screen](image1)

Fig.1

- Click on the Login button to submit the details As a result, a screen appears as shown in Fig.2:
To open the Leave Management System (eLeave) application, click on the link mentioned in the left panel (Fig.2).

As a result, Leave Management System application is displayed as shown in Fig.3:
Administrator Role

Admin account comprises of fifteen modules:

- Dashboard
- Exceptional Workflow
- Apply LTC Encashment
- Delegate
- Consolidated Report
- Apply LTC Encashment
- Administration
- Apply
- Sanction Leave
- Pending Leave Request
- Reports
- My Leave status
- Notification Reports
- Approval Workflow
- Work Flow Manager
- Alert Settings

Let’s have a quick overview of these modules one by one.
Dashboard

It displays all those leave applications which are due for approval by Reporting/Controlling/Approving or by Sanctioning authority. By default, Dashboard page opens in the case when leave requests are pending for approval.

Steps for dashboard are as follows:

- Click on the Dashboard module and click on the Request ID, as shown in Fig.4:

![Fig.4](image)

- A new window will open as shown in Fig.5:

![Fig.5](image)

- The user can see the status of their leaves along with the Approve/Reject time stamp.

Note:

1) User can click on the Request Id to view the leave movement of their applied leaves.
2) User can view information related to the Leave Balance/ Upcoming Public Holidays/Employee on Leave.
3) User can check the official name to whom the request is pending for approval as shown in Fig.5.
4) In case if officer had send any message, then the discussion box appears along with the leave id. The officer clicks on leave link, as a result the leave page appears. Click on Discuss link, as result the message pop-up window
appears along with the message send by the officer, the user can view the message and enters the reply and sends it to the officer, as shown in Fig.6:
Exceptional Workflow

Exceptional Workflow is created by the Admin for approval of leaves (CL, RH, Compensatory Leave and Station Leave) at multiple levels (Reporting, Controlling and Approving) unlike approval of leaves only at the Reporting level. By default, CL, RH, Compensatory Leave and Station Leave are approved at Reporting level. This workflow is created in the case where the department wants to forward the leave requests at multiple levels.

Steps to create exceptional workflow are as follows:

- Click on the **Exceptional Workflow** module, as shown in **Fig.7**:

  ![Fig.7](image)

- Click on the **Add New Exceptional Workflow** button to define the process flow for the particular user. As a result, a new page appears as shown in **Fig.8**:

  ![Fig.8](image)
• An Admin can search the employee by **Employee Code, Employee Name** or **Designation** as shown in **Fig.9**:

![Fig.9](image)

• Click on the checkbox corresponding to the employee name for whom workflow needs to be created as shown in **Fig.10**:

![Fig.10](image)

• Select the **Leave type** and the **Authority Levels** (Fig.10).
- Define the officer’s name, approval workflow level number corresponding to the roles as shown Fig.11:

![Fig.11](image)

- Click on the Save Exceptional Workflow button (Fig.11).

Note:

1) Admin can search and view the exceptional workflow of an employee by **Employee Code, Employee Name, Designation** or by clicking on **Show All** button (Fig.8).

2) A department can sanction leaves at Approving level. It is configurable as per the department requirement.

3) Admin can delete the workflow by using **Action button**.

4) PDF can be generated using **Generate PDF link**.

5) If the employee is assigned with Exceptional Workflow along with any Approval workflow, then the application will select the Exceptional workflow.
Apply LTC Encashment

A user can apply for LTC encashment using this interface. The interface specifies the Earned Leaves (EL) encashed during a particular LTC period.

To apply for LTC encashment, perform the following steps:

- Click on the **Apply LTC Encashment** module as shown in Fig.12:

![Fig.12](image)

- Enter the details and click on the **Send Request** button as shown in Fig.13:

![Fig.13](image)
• A message will appear as shown in Fig. 14:

![Message](image1)

**Fig. 14**

• Click on the OK button to send the request (Fig. 14).

---

Note:

1) A message will appear, in the case of already applied LTC for the same block year.
2) User can apply a maximum of **10 days** for their LTC encashment as shown in Fig. 14.
3) A balance of at least **30 days** of earned leave is required to apply for LTC encashment.
4) User can avail **60 days** of LTC encashment during the entire career.
5) User can edit the number of leaves for encashment by selecting ‘Yes’ Radio button in ‘Edit No. of Days’ field with remarks.
6) User has the provision to **Upload Document** at the time of applying LTC for himself/herself or for the spouse.
7) The Block Year is fetched from the PIMS module. If the department does not have PIMS module, in that case, Admin applies for LTC on behalf of users from “Apply for LTC encashment” from “Admin/Establishment” module.
Delegate
This module is available to the employee who is assigned to represent another employee as reporting/controlling/approving in the absence of the respective authority.

It has following links as shown in Fig.15.

Let’s learn about them one by one.

- Add Delegate
- Delegate Uploads
- Delegate Report
- Delete Delegate

Add Delegate
This option facilitates the Admin to Add and remove delegates assigned to employees.

To add delegate, perform the following steps:

- Click on the Delegate module and then click on the Add Delegate Link, as shown in Fig.15:

Fig.15
Select the **Employee Name** for whom the delegation is required, select the delegated employee name in **Delegate Name** and select the To and from Date period for which duties are delegated as shown in **Fig.16**:

![Add Delegate Form](image)

**Fig.16**

Click on the **Submit** button to assign a delegate (**Fig.16**).

**Note:**
The delegated roles automatically expire after completion of delegation period.

**Delegate Uploads**
This option facilitates the Admin to view reference documents uploaded by the delegated person for the corresponding leave request.

To view delegate uploads, perform the following steps:

- Click on the **Delegate Uploads** link, as shown in **Fig.17**:
Enter the data in required fields, and click on the **Submit** button as shown in **Fig.18**:

```
Delegate Reports

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<tr>
<td>To</td>
<td>30-09-2017</td>
</tr>
<tr>
<td>Delegate Name</td>
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</tr>
</tbody>
</table>
```

**Delegate Report**

This option facilitates the Admin to view delegates assigned to employee(s).

To view delegate, perform the following steps:

- Click on the **Delegate Report** link, as shown in **Fig.19**:
As a result List of Delegate Report appears, as shown in Fig.20:

**Delete Delegate**

This option facilitates the Admin to delete delegates assigned to employee(s).

To delete delegate, perform the following steps:

- Click on the **Delete Delegate** link, as shown in Fig.21:

- As a result, List of delegates appears, click on **cross (×)** icon to delete the delegates, as shown in Fig.22:
Consolidated Report
This module facilitates the Admin to view the combine leave report of applicants, subordinates and other users of the department in an integrated form.

To view the consolidated report of applicants and subordinate, perform the following steps:

- Click on the Consolidated Report module as shown in Fig.23:

![Consolidated Leave Report for Admin (With Self and Subordinate)](image)

- Click on the Consolidated Leave Report for Admin (With Self and the Subordinate) link (Fig.23).
• A pop-up window appears. Enter the required fields and click on the **Submit** button as shown in **Fig.24**:

![Consolidated Leave Report for Admin (With Self and Subordinate)](image)

**Fig.24**

• The consolidated report will open. Click on the leave count for which details are required as shown in **Fig.25**:

![Consolidated Leave Report for Admin (With Self and Subordinate)](image)

**Fig.25**
Complete details of the selected nature of leave will open as shown in **Fig.26**:

![Fig.26](image)

**Note:**

Admin can also view the consolidated leave report for all employees.
Administration

This module facilitates the Admin to manage the accounts of all employees in an organization. Admin can apply leaves on behalf of the user, upload required documents, manage and update employee leave balance etc.

It has following links as shown in Fig.27.

Let’s learn about them one by one.

Update Leave Balance

This feature facilitates the admin to update leave balance for employees. The admin can add and update CL, RH and Special Casual Leave.

To update the leave balance, perform the following steps:

- Click on the **Update Leave Balance** link, as shown in Fig.27:

  ![Fig.27](image1)

- Enter the required fields and click on the **Submit** button, as shown in Fig.28:

  ![Fig.28](image2)
Enter the **Leave Balance**, select the **Credit Date** and click on the **Save** button to credit leaves into previous leave balance.

Or

Click on the **Edit Balance** button to replace the previous balance with the new balance, as shown in **Fig.29**:

![Fig.29](image)

---

**Note:**

1) EL and HPL cannot be updated using this module *(Refer to PIMS application)*.

2) In case of a Female account, CCL leave balance will also be available.

3) CCL balance cannot be greater than 730.

4) CL and RH shall be credited once a year, **8 for CL** and **2 for RH**. If department has the rule to acquire more than 8 CL’s, in that case, number of CL’s can be configured from ‘**Configure number of leave**’ under ‘Admin Module’.

5) **4 days** of additional **Special Casual Leave** is provided to employees with disabilities for specific requirements relating to the disability.
Leave Update for Complete Organization

This option facilitates the Admin to assign and update leave count simultaneously for all employees in the organization.

To update leave, perform the following steps:

- Click on the **Leave Update for Complete Organization** link, as shown in Fig.30:

![Fig.30](image)

- As a result, two types of cadre choice appear as shown in Fig.31.

Let’s learn about them one by one.

**Update without Cadre**

- Select the **Update without Cadre** option and click on the **Submit** button, as shown in Fig.31:

![Fig.31](image)
• Enter the leave count and click on the **Update for All** button, as shown in **Fig.32**:

![Fig.32](image1)

**Update with Cadre**

• Select the **Update with Cadre** link, and click on the **Submit** button as shown in **Fig.33**:

![Fig.33](image2)
- Leave Update for Complete Organization Cadre wise window appears, as shown in Fig.34:

![Fig.34](image)

- Now, the Admin can update leave count according to the Designation, Organization Unit or by selecting All option for the complete organization.
If Admin selects ALL:

- On selecting ‘All’ checkbox option, it shows the list of employees for whom logged in user is Admin and authorized for, as shown in Fig.35:

![Fig.35](image)

- Select the check box corresponding to the employees for whom leave balance needs updates (Fig.35).

- Select ALL checkbox to update all type of leave or select particular **Leave Type** under **Select Leave Type** section.
• Enter the leave count corresponding to the Leave Type (Fig.35).

• Click on the 'Update for All' button to update the leaves, as shown in Fig.36:

![Fig.36]

**If Admin selects OU Name:**

• On selecting the **OU Name** option, it shows the list of employees that belong to the selected OU and for whom the logged in user is Admin and authorized for, as shown in Fig.37:

![Fig.37]
Select the check box corresponding to the employee for whom leave balance update is required, (Fig.37).

Select **ALL** checkbox to update all type of leaves or select particular **Leave Type** under **Select Leave Type** section (Fig.37).

Click on the ‘**Update for All**’ button to update leaves, as shown in **Fig.38**:
If Admin selects Designation Name

- On selecting the **Designation Name**, it shows the list of respective designation employees for whom the logged in user is Admin and authorized for, as shown in **Fig.39**:

![Fig.39](image-url)
• Select the check box corresponding to the employee for whom leave count balance update is required, as shown in Fig.40:

![Fig.40]

• Select **ALL** checkbox or select **Leave Type** and enter the leave count corresponding to the leave type (EL, HPL).

• Click on the **Update for All** button to update the leave (Fig.40).

**Note:**

1) CL and RH shall be credited once a year.
2) EL shall be credited in advance for **15 days** and HPL for **10 days** in two installments on every **January** and **July**.
3) An Admin can exclude specific employee while updating leaves using the **Exceptions** link.
4) An Admin can check the list of employees whose balance is not updated due to retirement from “**List of Retiring Employees**” link as shown in Fig.40.
Apply Manual Leave Application

This interface facilitates the Admin to maintain the record in Leave Management System (eLeave) application for leaves which are already sanctioned on paper.

To upload manual leave application on behalf of the employee, perform the following steps:

- Click on the **Apply Manual Leave Application** link, as shown in **Fig.41**:

![Fig.41](image1)

- Enter the details and click on the **Submit** button, as shown in **Fig.42**:

![Fig.42](image2)
• Apply leave page appears as shown in Fig.43:

![Apply leave page screenshot](image)

Fig.43

• Enter the metadata and click on the Send Request (Send Request) button (Fig.43).

Note:

In ‘Approved By’ drop-down list, name of only those officers name will appear who are in the workflow of the user.
Apply Manual Joining
This option facilitates the Admin to apply for joining on behalf of the employee who is not able to join through Leave Management System (eLeave) application. This option allows the joining of those leaves which are applied through Apply Manual Leave Joining option.
To upload manual joining report on behalf of the employee, perform the following steps:

- Click on the Apply Manual Joining link, as shown in Fig.44:

![Fig.44](image-url)
• Enter the employee details, and click on the Submit button, as shown in Fig.45:

![Fig.45](image1)

• Select the Request Id of the sanctioned leave for which joining report needs to be uploaded, as shown in Fig.46:

![Fig.46](image2)
Enter the metadata and click on the Send Request (Send Request) button, as shown in Fig.47:

![Fig.47]

**View Employee leave History**

This option facilitates the Admin to view the leave history of employees (Active or Inactive) in an organization.

To view employee leave history, perform the following steps:

- Click on the **View Employee Leave History** link, as shown in Fig.48:

![Fig.48]
• Search the employee and click on the **Submit** button, as shown in **Fig. 49**: 

![Fig. 49](image)

• Click on the **Request ID** link, employee leave history page with complete detail respective to leave will appear as shown in **Fig. 50**: 

![Fig. 50](image)

**Note:**

PDF of employee leave history can be generated using the **Generate PDF** link.
Report by Admin
This option facilitates report generation of leaves applied by users in a particular period with leave status and leave count.

To view and generate a report, perform the following steps:

- Click on the **Report by Admin** link, as shown in **Fig.51**:

![Fig.51](image1)

- Enter the time period for which report is required and click on the **Submit** button, as shown in **Fig.52**:

![Fig.52](image2)
- The report appears as shown in **Fig.53**:

![Fig.53 leave report](image)

### Update Approval Authority (Individual)

This option facilitates the Admin to replace or update approving authority for an individual.

To update approval authority for an individual employee, perform the following steps:

- Click on the **Update Approval Authority (Individual)** link, as shown in **Fig.54**:

![Fig.54 update authority](image)
• Search the employee and click on the Search button, as shown in Fig.55:

Fig.55

• Select want move pendency option if user leaves are in pending state.

• Select Authority Levels and Employee Name to whom authority will be assigned as shown in Fig.56:

Fig.56

• Click on the submit button (Fig.56)

Note:
1) This procedure is applicable for those users whose workflow is already defined.
2) When Admin selects “want move pendency” option then all the pending data moves to the current officer account for the approval.
Update Approval Authority (All)
This option facilitates the Admin to replace or update a particular approving authority for all employees that are in the workflow of the previous approving authority.

To update approval authority for all employees, perform the following steps:

- Click on the **Update Approval Authority (All)** link, as shown in Fig. 57:

![Fig. 57](image)

- Select the **Authority levels**, **Employee Name Earlier Employee Name** and **Replace with New Employee Name** fields as shown in Fig. 58:

![Fig. 58](image)

- Click on the **Submit** button (Fig. 58). As a result, the entire request will move to the new authority.
Generate Memorandum

Generate Memorandum is used to generate notes in which records of sanctioned leaves (Active or Inactive employees) is maintained along with the policies.

To generate memorandum, perform the following steps:

- Click on the **Generate Memorandum** link, as shown in **Fig.59**:

![Fig.59](image)

- Enter the data and click on the **Submit** button as shown in **Fig.60**:

![Fig.60](image)

- **Memorandum Report for Admin** page appears, including the detail of leave record along with the leave status as shown in **Fig.61**:

![Fig.61](image)
Select the record by selecting the corresponding checkbox and click on **Generate PDF** link as shown in **Fig.62**:

**Note:**

1) The Memorandum will be generated in the form of a PDF.
2) Once the memorandum is generated status changes from “**Not**” to “**Gen**” under **ReportGen** section.
Joining Report

This option facilitates the Admin to generate a report of those employees who have joined their duty.

To generate joining report, perform the following steps:

- Click on the **Joining Report** link, as shown in **Fig.63**:

  ![Fig.63](image)

- Enter the data in the mentioned fields and select **Joining Status** option for the required type of report as shown in **Fig.64**:

  ![Fig.64](image)

- Click on the **Submit** button (**Fig.64**).
• Joining Report for the Admin page appears along with the name, designation and joining details as shown in Fig.65:

![Fig.65]

Note:
1) If the Admin selects **Overshoot** option in **Report Type** (Fig.65) then the report will provide details of those employees who have joined after their joining date.

2) On selecting **Awaiting Approval** option, the report will provide details of those employees whose joining is pending for approval.

3) On selecting **Joined** option, the report will provide details of those employees whose joining request is sanctioned.

4) On selecting **Joining for Pending** option, the report will provide details of those employees who have not submitted their joining request yet.
Combined List of Employees

This option provides leave balance detail of all employees in an organization irrespective of their active or inactive status.

To view the leave balance of all employees, perform the following steps:

- Click on the **Combined List of Employees** link, as shown in **Fig.66**:

![Fig.66](image)

- Enter the data in mentioned fields and click on the **Submit** button, as shown in **Fig.67**:

![Fig.67](image)
The **combined list of Employees** page appears including leave balance of employees as shown in **Fig.68**:

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Employee Code</th>
<th>Name</th>
<th>Designation</th>
<th>Grade Pay</th>
<th>Hrais Pay</th>
<th>Cl.</th>
<th>DFF</th>
<th>HFL</th>
<th>HFA</th>
<th>CL</th>
<th>SCL</th>
<th>MTE</th>
<th>PTA</th>
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<td>UNDER SECRETARY</td>
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<td>2</td>
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<td></td>
<td></td>
</tr>
<tr>
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<td>0.0</td>
<td>7</td>
<td>2</td>
<td>13</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>DEEPA SHARMA</td>
<td>PRINCIPAL DIRECTOR</td>
<td>9.0</td>
<td>0.0</td>
<td>8</td>
<td>1</td>
<td>25</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>0810</td>
<td>CHANDRA GUPTA</td>
<td>ASSISTANT</td>
<td>9.0</td>
<td>0.0</td>
<td>4</td>
<td>2</td>
<td>15</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>07099</td>
<td>HRIT GUPTA</td>
<td>SECTION OFFICER</td>
<td>9.0</td>
<td>0.0</td>
<td>1</td>
<td>0</td>
<td>16</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>070709</td>
<td>KAPIL VERMA</td>
<td>DIRECTOR</td>
<td>9.0</td>
<td>0.0</td>
<td>8</td>
<td>2</td>
<td>30</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Fig.68**

**Note:**
Excel sheet and PDF can also be generated using the **Generate Excel** and **Generate PDF** link.
Apply Exception Leave

This option facilitates the Admin to apply for leave without any validation. Admin can apply leave on behalf of the employee. For example, CL after EL or other combinations can be taken with no validation.

To apply for exceptional leave, perform the following steps:

- Click on the **Apply Exception Leave** link, as shown in **Fig.69**:

![Fig.69](image-url)

- Enter the data in the mentioned fields and click on the **Submit** button, as shown in **Fig.70**:

![Fig.70](image-url)

- **Apply for Exception Leave** page appears and follows the steps of **Error! Reference source not found. Leave process.**
Enter the data and click on the Send Request button, as shown in Fig.71:

Note:
1) Employees who are not entitled to have a week off on Saturday and Sunday can avail CL on Saturday and Sunday (It is configurable as per department requirement).
2) Weekly off and holidays falling during a period of casual leave are counted (It is configurable as per department requirement).
Approve Exception Pending Leave(s)

This option facilitates the Admin to move the pending leaves to another concern approving authority in the absence of assigned approval authority. The assigned authority can approve leave and afterward, the leave request follows the normal workflow.

To move pending leave application, perform the following steps:

- Click on the **Approve Exception Pending Leave(s)** link, as shown in **Fig.72:**

![Fig.72](image)

- Enter the data in the mentioned fields and click on the **Submit** button, as shown in **Fig.73:**

![Fig.73](image)
• Click on the **Request Id** link as shown in **Fig.74**:

![Fig.74](image)

• Select the employee name in **Forward To** field to whom the request will move as shown in **Fig.75**:

![Fig.75](image)

• Click on the **Send Request** button (**Fig.75**).

**Note:**
Admin can also view subordinates leave history and employee Leave balance using **View subordinate Leave History** and **View Employee leave History** link.
Apply for LTC (Leave Travel Concession) Encashment

Admin can apply LTC manually using this interface on behalf of users. This interface specifies Earned Leaves (EL) encashed during a particular LTC period. It facilitates the Admin to apply for the department not having PIMS module.

To apply for LTC, perform the following steps:

- Click on the **Apply for LTC Encashment** link, as shown in Fig.76:

![Fig.76](image1)

- Enter the employee details and click on the **Submit** button as shown in Fig.77:

![Fig.77](image2)
Enter the metadata and click on the **Sanction** button, as shown in Fig.78:

**Fig.78**

**Note:**

1) Net EL Balance, Total number of previous Leave Encashment application and Total Number of Leave Encashment period availed (in days) are auto updated after deduction of every EL request.

2) LTC block year for the home town is **2 years** and for any other place is **4 years**.

3) A balance of at least **30 days** of earned leaves is required to apply for LTC encashment.
LTC Report
This option facilitates the Admin to view the report of LTC encharged by employees in an organization.

To view the LTC report, perform the following steps:

- Click on the **LTC Report** link, as shown in **Fig.79**:

![Fig.79](image)

- Enter the employee details and click on the **Submit** button as shown in **Fig.80**:

![Fig.80](image)
As a result, **LTC Encashment Report** page appears including the detail of employees as shown in Fig.81:

![LTC Encashment Report](image)

**Note:**
1) PDF of LTC Encashment Report can be generated using the **Generate PDF** link
2) ‘**LTC Report**’ shows those LTC records which are applied from the ‘**Apply for LTC Encashment**’ from Admin module.
PIMS Module Link
This option allows the Admin to update EL and HPL of employees. When the Admin clicks on the PIS Module Link two leave account appears. Leave Account I, updates EL and HPL of users and Leave account II provides the detail of sanctioned and canceled leaves.

- Click on the PIMS Module link, as shown in Fig.82:

![Fig.82](image)

- Enter the employee details and click on the Submit button as shown in Fig.83:

![Fig.83](image)
Leave Accounts page appears as shown in Fig.84:

Fig.84

Leave account I - This option allows the Admin to add and edit employees leave.

To add and edit leaves, perform the following steps:

- Click on the Leave account I link, Enter the data and click on the Submit button.
- As a result, employee leave data gets updated as shown in Fig.85:

Fig.85
Note:
1) A user may enter 0 in EL if the user doesn’t know the EOL and LTC detail; similarly for HPL same process is followed.
2) Total EL at credit in days and Total HPL at credit in days fields are auto calculated.
3) EL Credited at the beginning of Half-year and HPL Credited at the beginning of Half-year can be edited using Edit (Edit) button.
4) eLeave Balance Master link updates other type of leaves as shown in Fig.85.
5) Admin cannot update leave balance for the employee whose age is more than 60 years. (It is configurable as per department requirement)

Leave Account II - This option facilitates the Admin to view leave record of Sanctioned and Cancelled Leave of a particular employee.

- Click on the Leave Account II link as shown in Fig.86:

![Fig.86](image)
• Enter details and click on the **Submit** buttons shown in **Fig.87**:

![Fig.87]

**Note:**
Admin can search the leave by using **From** and **To** date, **Type Of Leave** or **Leave Status** option.
Extend/ Curtail Report
This option allows the Admin to view employees Extend/Curtail leave report. Extended leave report provides the report of those employee’s detail who have extended their leave request. Curtail leave report provides the report of those employees details who have joined the office before the end of leave period.

To view the extended and curtail report, perform the following steps:

- Click on the Extend/ Curtail Report link, as shown in Fig.88:

- Enter the Employee Name, From and To date and select the Leave Type as shown in Fig.89:

- Click on the Submit ( ) button (Fig.89).
• Extend/ Curtail Report for Admin page appears as shown in Fig.90:

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Employee Code</th>
<th>Name</th>
<th>Designation</th>
<th>Request ID</th>
<th>Nature of Leave</th>
<th>Submitted Date</th>
<th>From Date</th>
<th>To Date</th>
<th>NO. of Days</th>
<th>Leave Status</th>
<th>Dept/Sec/Div</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>07113</td>
<td>Ajay Shay</td>
<td>ASSISTANT</td>
<td>E0708</td>
<td>EL</td>
<td>02-03-2017</td>
<td>01-04-2017</td>
<td>06-04-2017</td>
<td>5</td>
<td>Approved</td>
<td>IT SECTION</td>
</tr>
<tr>
<td>2</td>
<td>07113</td>
<td>Ajay Shay</td>
<td>ASSISTANT</td>
<td>E0699</td>
<td>EL</td>
<td>13-02-2017</td>
<td>05-02-2017</td>
<td>14-02-2017</td>
<td>10</td>
<td>Sanctioned</td>
<td>IT SECTION</td>
</tr>
</tbody>
</table>

Fig.90

Note:
1) Request ID with CUR prefix is Curtail Leave and with E prefix is Extended leave.
2) PDF can also be generated using the Generate PDF link.

View Login History
This option facilitates the Admin to view employee’s login history in a specific duration.

To view the login history of employees, perform the following steps:

• Click on the View Login History link, as shown in Fig.91:
- Enter the **Employee Name** and click on the **Submit** button as shown in **Fig.92**:

![Fig.92](image)

- **View Login History Report** page appears as shown in **Fig.93**:

![Fig.93](image)

**Note**

The Admin can view the history of all employees in an organization on clicking **List All** button.
Configure Number of leave
This option facilitates the Admin to configure and provide the maximum number of leaves that can be availed during a calendar cycle with the validation of maximum number of leaves that can be used altogether.

Steps to configure leaves are as follows:

- Click on the **Configure Number of leave** link, as shown in **Fig.94**:

![Fig.94](image)

- Search the **Nature of leave you want to make configurable** field and click on the **Submit** button, as shown in **Fig.95**:

![Fig.95](image)

- **Configure Number of Leave** page appears as shown in **Fig.96**:

![Fig.96](image)
- Enter the total number of leave count for a calendar cycle in **Enter Total Number of Leaves** field.

- Enter the number of leaves that can be availed all together in **Enter Maximum Number of leaves that can be availed in one shot** field (Fig.96).

- Click on the **Submit** button (Fig.96).

**Note:**

**Maximum Number of Leaves that can be availed in one shot** and **Enter Total Number of Leaves** fields are configurable and can be provided depending on the individual department requirement.
Monthly Leave Update Report
This option facilitates the Admin to view month wise report. The option will provide the report of those employees whose leave balance is updated in the selected month.

Steps to generate monthly leave update report are as follows:

- Click on the Monthly Leave Update Report link, as shown in Fig.97:

  ![Fig.97](image)

- Select the From Date and To Date and click on the Submit button, as shown in Fig.98:

  ![Fig.98](image)
Monthly Leave Update Report of the employee appears as shown in Fig.99:
Cancellation of Joining Request

This option facilitates the Admin to cancel the joining request of the sanctioned joining leave request.

To cancel the joining request, perform the following steps:

- Click on the **Cancellation of joining Request** link, as shown in **Fig.100**:

![Fig.100](image)

- Search the employee and click on the **Submit** button, as shown in **Fig.101**:

![Fig.101](image)
Select the checkbox and click on the **Cancel Joining** button, as shown in Fig.102:

![Fig.102]

**Note**

Once the Admin clicks on the **Cancel Joining** button no workflow is followed, Leave gets canceled and old Leave request link gets enabled i.e. **extend, curtail and cancel.**
Update Leave Balance for Upcoming Year
This option facilitates the Admin to update the leave balance of CL and RH for the upcoming year.

Steps to update leave balance for the upcoming year are as follows:

- Click on the **Update Leave Balance for Upcoming Year** link, as shown in **Fig.103:**

![Fig.103](image)

- Select the **Employee Name** and **Upcoming Year** to update leave balance of CL and RH as shown in **Fig.104:**

![Fig.104](image)

- Click on the **Submit** button (**Fig.104**).
Enter the leave balance, select the credit date and click on the **Save** button to credit the leaves into previous leaves.

Or

Click on the **Edit Balance** button to replace the previous balance with new leave balance count as shown in **Fig.105**:

![Figure 105](image)

**Note:**
On using **Update Leave Balance for All** link, CL and RH will be updated for all employees except those employees who are updated from **“Update Leave Balance for Upcoming Year”** link.
Apply Exceptional Joining Request

This option facilitates the Admin to change the joining date of the employee from the actual joining date. In such case, employee requests to the Admin for a change in the joining date.

For example, A user applies for a leave on Friday and the actual joining date is on Monday but user joins the office on Saturday, in that case, Admin shall use ‘Submit Exceptional Joining Request’ link.

Steps to submit exceptional joining request link are as follows:

- Click on the **Apply Exceptional Joining Request** link, as shown in **Fig.106**:

![Fig.106](image)

- Search the user by **Name, Employee code** or **Applicant ID** and click on the **Submit** button as shown in **Fig.107**:

![Fig.107](image)
- Click on Request ID for which joining is required as shown in Fig.108:

![Fig.108]

- Enter the 'Joining Date' and 'Joining Remarks' and click on the Send Request ( ) button as shown in Fig.109:

![Fig.109]

- A message will appear for the confirmation.

Note:
When a user fills the joining different from the actual joining date then the application prompts a message for confirmation.
Previous Half Year Leave Balance

This report shows the leave record of those employees whose leaves are credited up to 30th June and 31st December for the previous half year.

Steps to view previous half year leave balance are as follows:

- Click on the **Previous Half Year Leave Balance** link, as shown in **Fig.110**:

  ![Fig.110](image)

- Select the **Employee Name** and click on the **Submit** button, as shown in **Fig.111**:

  ![Fig.111](image)
- **Previous Half Year Leave** report appears as shown in **Fig.112**:

![Previous Half Year Leave Balance Table](image)

**Fig.112**
Add Nature of Leave
This option facilitates the Admin to add nature of leave into the application as per the department requirement.

Steps to add nature of leave are as follows:

- Click on the **Add Nature of Leave** link, as shown in **Fig.113**:

  ![Fig.113](image)

- Select the checkbox corresponding to the required nature of leave and click on the **Save** button as shown in **Fig.114**:

  ![Fig.114](image)

**Note:**
Admin of the department can enable /disable the leave type as per the department requirement.
Update PIMS Service Book

This option facilitates the Admin to Update the Leave Balance Transaction and Leave Balance Credit data manually in Centralizes Personal Information Management System (PIMS).

Steps to update the Leave Balance Transaction are as follow:

- Click on the Update PIMS Service Book link, as shown in Fig.115:

![Fig.115](image)

- Click on Leave Balance Transaction link, as shown in Fig.116:

![Fig.116](image)
• Search the employee using employee name, Employee Code, etc and **Submit** the details or Click on **List All** button, as shown in **Fig.117**:

![Fig.117](image)

• As a result the List of employee(s) appears, select the employee for whom details need to be updated and click on **Update Service Book** button, as shown in **Fig.118**:

![Fig.118](image)
As a result message appears “The data is successfully processed”, Fig.119:

![Fig.119](image)

Steps to update the Leave Balance Credit are as follow:

- Click on the Update PIMS Service Book link, as shown in Fig.120:

![Fig.120](image)
Click on **Leave Balance Credit** link, as shown in Fig.121:

![Fig.121](image121)

Search the employee using employee name, Employee Code, etc and **Submit** the details or Click on **List All** button, as shown in Fig.122:

![Fig.122](image122)
As a result the List of employee(s) appears, select the employee for whom details need to be updated and click on **Update Service Book** button, as shown in Fig. 123:

![Fig. 123](image)

As a result message appears "**The data is successfully processed**", Fig. 124:

![Fig. 124](image)
Edit Alert Text
This option facilitates the Admin to edit the Alert message which is sent as email/SMS to employee(s) when any action is taken against leave request.

Steps to edit Alert messages are as follow:

- Click on the **Edit Alert Text** link, as shown in **Fig.125**:

  ![Fig.125](image)

- Select the **Process Name** and **Action Name**, the default message appears in text box, admin can edit the Alert message as per the requirement and click on the **Save Changes** button as shown in **Fig.126**:

  ![Fig.126](image)

**Note:**
**Start Again** button: To reset all the fields.
Update Employee Leave Combination Data

This option facilitates the Admin to update/create the combination of leaves.

Steps to update/create are as follow:

- Click on the **Update Employee Leave Combination Data** link, as shown in **Fig.127**:

  ![Fig.127](image1)

- Select the **Leave Type** and **No. of combination**, and click on the **Submit** button as shown in **Fig.128**:

  ![Fig.128](image2)
Select the combination leave and click on **Save** button as shown in **Fig.129**:

**Fig.129**

As a result the message appears “**Combination Save Successful**”. The created combination appears in list is shown in **Fig.130**:

**Fig.130**

---

**Note:**

1) To view the list of leave combination; click on **Show Leave Combination** button.

2) Admin can activate and deactivate the saved combination by selecting the particular combination and clicking on **Active** and **Inactive** buttons respectively.

3) The status “**True**” indicates the combination is **Active** whereas the status “**False**” indicates combination is **Inactive**.
Add Exceptional Weekly Off
This option facilitates the Admin to create new exception week off’s (i.e. shift duty).

Steps to save shift duty/ exceptional weekly off are as follow:

- Click on the **Add Exceptional Weekly Off** link, as shown in **Fig.131**:

![Fig.131](image1)

- Enter the Weekly off Name, select the Weekly off Days and click on **Save** button, as shown in **Fig.132**:

![Fig.132](image2)
As a result message appears “Save Successfully”, shown in Fig.133:

![Add Weekly Off](image)

**Fig.133**

Note:

1) Admin can activate and deactivate the saved Shift Duty/ Exceptional off by selecting the particular off by weekly off Name and click on **Active** (Active) button and **Inactive** (Inactive) buttons respectively, as shown in Fig.133.

2) The status “True” indicates the Shift duty/ Exception Off is **Active** whereas the status “False” indicates combination is **Inactive**.
Assign Weekly Off to Employee

This option facilitates the Admin to assign shift duty (i.e. exceptional weekly off) created under Add Exceptional Weekly Off link.

Steps to assign shift duty/ exceptional weekly off are as follow:

- Click on the Assign Weekly Off to Employee link, as shown in Fig. 134:

![Fig. 134](image_url)

- Select the Checkbox for whom Admin needs to assign the weekly off. Select the Weekly off Days and From Date and To Date for which the weekly off is valid and click on Save button. Admin can also search the employee using Employee Code, Employee Name, Designation or OU Name as shown in Fig. 135:

![Fig. 135](image_url)
• As a result message appears “Data Save Successfully” and appears in the list, **Fig.136:**

![Image of screen showing Data Save Successfully]

**Fig.136**

**Note:**

1) Admin can assign and de-assign the saved Shift Duty/ Exceptional off by checking the check box and click on **Active (True)** button and **Inactive (False)** buttons respectively, as shown in **Fig.136.**

2) The Active Status “**True**” indicates the assigned Shift duty/ Exception Off is **Active** whereas the status “**False**” indicates the assigned off is **Inactive.**
Apply
This module facilitates a user to apply for leave/leaves. The leave application form consists of following fields:

- **Select Language:** User can view and enter the details in the Hindi language by selecting the language as Hindi in the application.

Note:
This feature is configurable at eOffice Administrator level.

- **Leave Type:** This feature refers, whether the user is applying for Single Leave or Combination leave.

Note:
Refer User Manual Annexure 1 for all types of leaves in detail.

- **Nature of Leave:** This feature refers to the different types of leaves available in the respective department, as mentioned below:
  1. Casual Leave (CL)
  2. Restricted Leave (RH)
  3. Earned Leave (EL)
  4. Half Pay Leave (HPL)
  5. Commuted Leave
  6. Paternity Leave
  7. Child Care Leave (CCL)
  8. Station Leave
  9. Compensatory Leave
  10. Duty Leave

Note:
Refer for Annexure 1 Leave Types in User Manual.

- **From/To:** This option allows the user to set the duration for which the applicant is applying for leave.

- **Prefix Days:** Shows the weekly off date(s) coming before the selected leave period.

- **Suffix Days:** Shows the weekly off date(s) coming after the selected leave period.

- **No. of Days:** This feature reflects the count of leaves applied by the applicant.

- **CC Mail To:** This feature facilitates the same purpose as CC in an email. It is for subordinates whom applicant wants to inform.
- **Delegate**: This feature facilitates the user to assign their subordinates leave request to another user. The leave request is redirected to the delegated user account for the time period the user is on leave.

- **Station Leave**: This feature states if the applicant will be in the station or out of station during their leave period.

**Note:**
On selecting Station Leave, the applicant has to select After/Before office hours.

- **Avail LTC (Leave Travel Concession)**: This option serves as an information for the Reporting/Approving/Controlling or Administrator/Establishment officer. If the applicant is going on LTC, then the radio button should be marked.

**Note:**
If the user selects LTC while applying for leave, the request Id can be viewed in **LTC taken against leave request** as a drop-down in **Apply LTC encashment** module.

- **Ex-India**: Ex-India leave may be provided if the user is leaving India during his leave period either for the office purpose or for personal purpose.

- **Reason/ Remark for Leave**: This field is to provide the reason for which the applicant is applying for leave.

- **Previous Leave Details**: This feature shows applicant last sanctioned leave details.

- **Address during Leave**: This refers to the destination address for which the applicant is applying for leave.

- **Send Request**: This action button sends the leave request to their Reporting Officer.

- **Reset**: This feature helps the applicant to reset the entered data.

**Note:**
1) If the user reporting officer is on leave, the leave directly goes to the next level for approval as mentioned in the Approval Workflow.
2) If the officer has selected ‘Delegate’ while applying for leave, the leave request of their subordinates directly goes to the delegated officer for approval.
3) If the link officer is updated in EMD while the officer is on leave, the leave request of subordinates directly goes to the link officer account.
To apply for leave, perform the following steps:

- Click on the **Apply** module, Enter the essential data into fields and click on the **Send Request** button, as shown in **Fig.137**:

![Fig.137](image)

- A message appears, click on the **OK** button to send the request as shown in **Fig.138**:

![Fig.138](image)
A user can view the status of their leaves from the Dashboard as shown in Fig.139:

Note:
1) The applicant can upload the supporting documents by clicking on the Choose File button. In the case of Commuted leave, it is mandatory to upload the supporting document.
2) In the case of CL (Casual Leave), RH (Restricted Holiday) and CH (Compensatory Leave), leave is approved by the Reporting Officer and does not require Controlling officer permission.
3) Click on the Combination Leave→Add More combination to apply more than one combination leave, as shown in Fig.140:
Upcoming Holidays

This feature facilitates the applicant to check the upcoming holidays on the same screen as shown in Fig.141:

Note:
The Gazetted (Red color) and Restricted holidays (Green color) will be highlighted if the holiday calendar is mapped in EMD application as shown in Fig.141.
Leave Balance Detail
This feature facilitates an applicant to check their updated leave balance detail as shown in Fig.142:

Note:
For the first time, the eLeave Administrator has to enter the leave details for all users. Afterwards, the application will automatically manage the leave balance according to leaves availed by the applicants (Fig.142).
Employee on Leave
This feature facilitates an applicant to check the list of users who are currently on leave as shown in Fig.143:

Note:
The list of users will appear only if they have applied for leave through Leave Management System Fig.143.

My Workflow Detail
This feature facilitates the applicant to check their approval workflow, i.e. the hierarchy through which their leave moves as shown in Fig.144:

Note:
The workflow will appear after the eLeave Administrator updates the workflow for all respective users Fig.144.
Sanction Leave

This module comprises of all those leave requests which are approved by the respective Reporting/Approving/Controlling authorities and are pending with Admin to sanction.

To sanction the leave application, perform the following steps:

- Click on the **Sanction Leave** module, the list of all leaves pending for sanctioning appears, as shown in Fig.145:

![Fig.145](image)

- Click on the **Request ID**, the details of applied leaves detail appears, as shown in Fig.146:

![Fig.146](image)
Click on the **Sanction** button to sanction the applied leave as shown in **Fig. 147**:

![Sanction Image]

**Fig. 147**

- The applied leave will be sanctioned with an automatic confirmation email sent to the applicant.

**Note:**

1) Admin can also generate a memo by using the **Sanction with Memo** button. The memo will be generated for sanctioned leaves.

2) On using the **Forward** button, the leave request will move to the Admin assistant’s account for further approval.

3) Admin can also reject the applied leave by using **Not-Recommend** button, the status will be updated in the applicant’s account along with a rejection mail.

4) Admin can also use the **Cancel** button, in the case when the Admin does not want to perform any action on the leave request.

5) Admin can define the email id In CC option at the time of sanctioning leave, for notification alert to any authority.
Pending Leave Request

This module comprises of those leave requests which are applied by the subordinates and are pending with Reporting/Controlling/Approving role for the required action. This option appears in the Admin account only if the Admin has additional roles other than Admin role.

To perform necessary action, perform the following steps:

- Click on the **Pending Leave Request** module as shown in **Fig.148**:

![Fig.148](image)

- Pending leave requests appear (**Fig.148**).

- Click on the checkbox corresponding to leaves under **Pending as Reporting/Controlling/Approving Officer** section (**Fig.148**).

- Add **Remarks** and click on the **Recommend/Not Recommend** button (**Fig.148**).

  OR

- Click on the **Request ID**, as a result, **Pending Leave Status** page will open as shown in **Fig.149**:
- Click on the **Approve /Not Recommend** button for the required action (Fig.149).
• A pop-up window appears for the confirmation as shown in Fig.150:

![Fig.150](image)

**Fig.150**

**Note:**
In case if officer had send any message, then the discussion box appears along with the leave id. The officer clicks on **leave** link, as a result the leave page appears, as shown in **Fig.151**:

![Fig.151](image)

**Fig.151**

Click on **Discuss** link, as result the message pop-up window appears along with the message send by the officer, the officers enters the reply and send it to the officer, as shown in **Fig.152**:
Fig. 152
Reports
There are nine types of reports generated by Reports module:

- My Leave History
- Subordinate History
- Leaves Approved
- Seven Days Report of Subordinates
- Action Taken By Subordinate
- Employees List whose Balance not Updated in Current Session
- Retiring Employees List
- Update Leave balance for Complete Organization
- Subordinate Balance Report

My Leave History
This option facilitates the Admin to view leave history report. An Admin can track the complete movement of their applied leaves.

To view leave history reports, perform the following steps:

- Click on the Reports module, click on the View Leave History link as shown in Fig.153:
• View Leave History page appears along with the status of applied leave as shown in Fig.154:

![Fig.154](image1)

• Click on the Request ID (Fig.154). As a result, a new window Leave Movement page appears as shown in Fig.155:

![Fig.155](image2)
**Subordinate History**

This option facilitates the user to view their subordinates leave history.

To view the report of subordinates, perform the following steps:

- Click on the **Reports** module, click on the **Subordinate History** link as shown in **Fig.156**:

![Fig.156](image1)

- **Subordinate History page** appears. Click on the **View Leave Details** link as shown in **Fig.157**:

![Fig.157](image2)
- Select the duration for which user wants to see the details and click on the Submit button shown in **Fig.158**:

![Fig.158](image)

- Click on the **Request ID**, as a result, leave movement detail page will appear as shown in **Fig.159**:

![Fig.159](image)
Leaves Approved
This option provides the detail of subordinates applied leaves which are approved by the reporting authority in the selected duration.

To view the detail of approved leaves, perform following steps:

- Click on the **Leaves Approved** link as shown in [Fig.160]:

![Fig.160](image1)

- Select the duration for which user wants to see the details and click on the **Submit** button shown in [Fig.161]:

![Fig.161](image2)

- Approved leave list appears as shown in [Fig.162]. A user can also sort the list according to the date.
**Fig. 162**

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Employee Code</th>
<th>Request Id</th>
<th>Name</th>
<th>Designation</th>
<th>Dept/Sec/Div</th>
<th>Nature of Leave</th>
<th>From Date</th>
<th>To Date</th>
<th>Total Days</th>
<th>Submitted Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>E0002</td>
<td>E0070</td>
<td>Arpali Roy</td>
<td>SECTION OFFICER</td>
<td>eOffice</td>
<td>HPL</td>
<td>22-09-2017</td>
<td>23-09-2017</td>
<td>2</td>
<td>14/09/2017 04:00 PM</td>
<td>Approved</td>
</tr>
<tr>
<td>2</td>
<td>E0005</td>
<td>E0061</td>
<td>Indu Chauhan</td>
<td>SECTION OFFICER</td>
<td>eOffice</td>
<td>EL</td>
<td>18-07-2017</td>
<td>00-07-2017</td>
<td>2</td>
<td>08/07/2017 05:45 PM</td>
<td>Approved</td>
</tr>
<tr>
<td>3</td>
<td>E0005</td>
<td>J00034E0062</td>
<td>Indu Chauhan</td>
<td>SECTION OFFICER</td>
<td>eOffice</td>
<td>EL</td>
<td>14-07-2017</td>
<td>14-07-2017</td>
<td>1</td>
<td>08/07/2017 05:47 PM</td>
<td>Approved</td>
</tr>
<tr>
<td>4</td>
<td>E0005</td>
<td>J00041E0068</td>
<td>Indu Chauhan</td>
<td>SECTION OFFICER</td>
<td>eOffice</td>
<td>HPL</td>
<td>14-09-2017</td>
<td>14-09-2017</td>
<td>1</td>
<td>08/09/2017 03:29 PM</td>
<td>Approved</td>
</tr>
<tr>
<td>5</td>
<td>E0005</td>
<td>E0059</td>
<td>Indu Chauhan</td>
<td>SECTION OFFICER</td>
<td>eOffice</td>
<td>HPL</td>
<td>31-08-2017</td>
<td>01-09-2017</td>
<td>1</td>
<td>08/08/2017 05:30 PM</td>
<td>Approved</td>
</tr>
</tbody>
</table>
Seven Days Report of Subordinate

This option provides the details of seven days leave report of subordinates according to the selected date. The report includes the selected date and also provides details of three days before and three days after from the selected date.

To view the report of last seven days, perform the following steps:

- Click on the **Seven Days Report of Subordinate** link, as shown in **Fig.163**:

![Fig.163](image)

- Select the date and click on the **Submit** button as shown in **Fig.164**:

![Fig.164](image)
The report appears as shown in Fig. 165:

![Seven Days Leave Details of the Employees](image)

**Fig. 165**

**Note:**
Red color states sanctioned leaves, Green color states user is available and yellow color states those leaves which are pending for approval.
Action Taken By Subordinate

This option provides the detail of those leaves for which user subordinates have taken action.

To view the report of action taken by subordinates, perform the following steps:

- Click on the **Action Taken By Subordinate** link, as shown in **Fig.166**:

  ![Fig.166](image)

- Select the **Date range**, **Subordinate Name** and **Action Taken** field. Click on the **Submit** button as shown in **Fig.167**:

  ![Fig.167](image)
As a result, the report appears as shown in Fig.168:

![Fig.168](image)

Note:
‘View Action Taken by Subordinate’ is similar to steps of the Reporting officer role.
Employees List Whose Balance Not Updated In Current Session

This report shows the list of those employees whose balance is not updated from the Leave Update for Complete Organization link under Administration module.

- Click on the Employees List Whose Balance Not Updated in Current Session link, as shown in Fig.169:

![Fig.169](image1)

- As a result, Report Choice of Admin page appears with two types of available reports.

Establishment/Admin Wise Report

This report shows the list of those employees whose balance is not updated from the ‘Update With Cadre’ option in ‘Leave Update for Complete Organization’ link under Administration module.

- Select radio button corresponding to the Admin Workflow Employees option and click on the Submit button, as shown in Fig.170:

![Fig.170](image2)
As a result, list of employees appears as shown in Fig. 171:

**Complete Organization Wise Report**

It shows the list of those employees in the organization whose balance is not updated in the current session.

- Select the radio button corresponding to the **Complete Organization Wise** option and click on the **Submit** button, as shown in Fig. 172:
As a result, the list of employees appears as shown in Fig. 173:

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Employee Name</th>
<th>Employee Code</th>
<th>Employee Group</th>
<th>Admin Name</th>
<th>Remark for Exclusion From Leave Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Alex L</td>
<td>AB1</td>
<td>Administration A-CPRM</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>2</td>
<td>Alex M</td>
<td>AB2</td>
<td>Administration A-CPRM</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>3</td>
<td>Alex K.T</td>
<td>NP1101</td>
<td>Accounts B-CPRM</td>
<td>M</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>4</td>
<td>Alex B.M</td>
<td>NP10107</td>
<td>Administration A-CPRM</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>5</td>
<td>Capacitor Dcl.</td>
<td>CD11</td>
<td>Capacitor Division</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>6</td>
<td>Cold</td>
<td>CD3</td>
<td>Centre for Collaborative Advanced Research (CCAR) CPRM</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>7</td>
<td>Cold</td>
<td>CDD01</td>
<td>Cannabis &amp; Orthognathics Division</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>8</td>
<td>Cold</td>
<td>CDE01</td>
<td>Civil Engineering Electrical (CED) CPRM</td>
<td>-</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
<tr>
<td>9</td>
<td>Creative MTR</td>
<td>E30009</td>
<td>UASGL-HPC/ENHAD</td>
<td>Enhance/Train</td>
<td>Please check duplication and post details of the employee or retirement issue</td>
</tr>
</tbody>
</table>

Fig. 173
Retiring Employees List
This report provides the list of retiring employees.

Steps to view the list of all retiring employees are as follows:

- Click on the **Retiring Employees List** link, as shown in **Fig.174**:

![Fig.174](image)

- As a result, the list of employees appears as shown in **Fig.175**:

![Fig.175](image)
Subordinate Balance Report
This report provides the Balance report of subordinate employees.

Steps to view the Subordinate Balance Report are as follows:

- Click on the **Subordinate Balance Report** link, as shown in Fig.176:

![Fig.176](image1.png)

- As a result, the Subordinate Balance Report list of employees appears as shown in Fig.177:

![Fig.177](image2.png)
**My Leave Status**

This module facilitates the user to check the status of their applied leaves. It also facilitates a user to take action on their applied leaves. The module is segregated into six sections as follows:

**All**

In this option, a user can have an integrated view of all types of leave (Pending, Approved or Cancelled) along with the details of Submitted date, Nature of Leave and Leave Period.

**Pending**

This option facilitates the applicant to filter those leave details which are in pending state.

Note:

Under **Pending** tab, the user has the option to withdraw his leave till the time leaves is not approved by Reporting authority.

**Sanctioned**

This option facilitates the user to filter those leaves which are already sanctioned by the Admin.

**Cancelled**

This option facilitates the user to filter those leaves which are cancelled by the applicant after getting sanctioned.

**Approved**

This option facilitates the user to filter those leaves which are in the approved state.

**Joined**

This option facilitates the user to filter those leaves against which user has given the joining.

To view leave status, the user has to perform the following steps:

- Click on the **My Leave Status** module as shown in **Fig.178:**
Click on any option (ALL, PENDING, SANCTIONED, CANCELLED, APPROVED, JOINED) for which details are required or the user wants to perform an action (Fig.178).

Click on the **Click Here to Take an Action** link to view the actions (Extend/ Cancel/ Curtail/ Joining) as shown in Fig.179:

**Fig.179**

Note:

Once the officer had applied for the leave, he/she can discuss with officer about the leave.

Under **My leave Status** click on the leave link, as a result the leave page appears. Click on **Discuss** link a pop window appears enter the message and click on **Submit** button as shown in Fig.180

**Fig.180**

Now, the **discuss** box will appears on the **Dashboard** or **Pending Leave Request** screen of the **Reporting/Reviewing/Accepting/Admin**. The officers can click on the **discuss** link and send the message to the officer while sending the leave to another level.
Leave Actions

Extend

This feature allows applicants to extend their leave duration. This option appears once the leave is sanctioned. To extend the leave, perform the following steps:

- Click on the **Extend** link as shown in **Fig.181**:

![Fig.181](image1)

- As a result, **Extend for leave** page will open as shown in **Fig.182**:

![Fig.182](image2)

- Enter the **To** date for which user wants to extend the leave duration (**Fig.182**).
- Click on the Send Request button to forward the request (Fig.182).

![Fig.183]

**Note:**
Once the request is sent for leave extension, a new Id is generated against the applied leave request Id as shown in Fig.183. Here E prefix denotes the extension of the leave request.

**Cancel**
This feature allows applicants to cancel their sanctioned leave. A user will provide the reason for the cancellation of leave. This option appears only after the leave is sanctioned.

To cancel the sanctioned leave, perform the following steps:

- Click on the Cancel link as shown in Fig.184:
• As a result, Cancellation for leave page will open as shown in Fig.185:

![Cancellation for Leave Page](image1)

**Fig.185**

• Enter the mandatory remarks in **Reason for Cancellation** field (Fig.185).

• Click on the **Send Request** button (Fig.185) to forward the request.
Note:
Once the request is sent for cancellation, a new Id is generated against the applied leave request Id as shown in Fig.186. Here C prefix denotes the cancellation of the leave request.
Now, in case when leave request is rejected by reporting officer then user can **Re-apply** the leave request against the cancelled leave request.

**Curtail**
This feature allows an applicant to withdraw leave before the completion of the leave period. For e.g. if a user has availed leave for three days and joins the office in two days then the remaining one day leave can be curtailed. This option appears only after the leave is sanctioned.

To curtail a sanctioned leave, perform the following steps:

- Click on the **Curtail** link as shown in Fig.187:
- **Curtail for leave** page will open as shown in Fig.188:

![Curtail for Leave form](image)

**Fig.188**

- Enter the **To** date (Fig.188), for which user wants to curtail the leave duration.

- Click on the **Send Request** button (Fig.188) to forward the request.
Note:

1) Once the request is sent for curtail leave, a new Id is generated against the applied leave request Id as shown in Fig.189. Here CUR prefix denotes the extension of the leave request.

2) The user can curtail leave only for future dates unlike for cancel leave option. When the cancel option is used, the complete leave duration gets cancelled. However, in case of curtail option partial leaves are deducted.

Note:

Refer to My Leave Request module of User Manual for the details of metadata fields.
Notification Reports

This module generates employees leave report of sanctioned and canceled leaves for a particular period with leave balance detail.

To generate notification reports, perform the following steps:

- Click on the Notification Reports module, as shown in Fig.190:

- Enter the Order No., From/To Date and Notification Type detail. Click on the Submit button, as shown in Fig.191:
• Leave Notification Report will be generated, as shown in Fig.192:

![Fig.192](image1)

• To edit the Government, Ministry or Department field, click on the link as shown in Fig.193. This will also reflect in Memorandum report.

![Fig.193](image2)

• Enter the data and click on the Submit button as shown in Fig.194:

![Fig.194](image3)
Department Name/Ministry name will be changed as shown in Fig.195:

Note:

1) PDF can also be generated using the **Generate PDF** link. In case officer needs to generate the pdf of some employee, select the checkbox for those employee(s) and click on Generate PDF link, as shown in Fig.195.

2) By default, all leave types notification is generated except CL and RH.

3) To add multiple recipients **Copy To** link is used.

4) The **Authorized Signature** link is used in the context of who will sign.
Approval Workflow

This module allows the Admin to create approval workflow for an employee. Approval workflow defines the approval sequence in which the leave request will be forwarded. The flow is in the order of Reporting Officer > Controlling Officer > Approving Officer > Admin > Admin Asst.

- Click on the Approval Workflow module, as shown in Fig.196.

![Fig.196](image)

- To add the workflow for an employee, click on the Add New Work Flow (Add New WorkFlow) button as shown in Fig.197:

![Fig.197](image)

- Search the employee by Employee Code, Employee Name or Designation (Fig.197).

- Select the Authority Level, enter the name corresponding to Roles and level number in the box.

- Click on the Save Workflow (Save Workflow) button as shown in Fig.198:
Note:

1) Admin can view the workflow of an employee by searching Employee Code, Employee Name or Designation or by clicking on the Show All (Show All) button.

2) Admin can delete the workflow using (×) action button.

3) PDF can be generated using Generate PDF link.

4) If the Admin selects 1 as Authority Level then only Approving Role officer will appear.

5) If the Admin selects 2 as Authority Level, Reporting Role officer and Approving Role Officer will appear.

6) If the Admin selects 3 as Authority Level then Reporting Role officer, Approving Role Officer and Controlling Role officer will appear. This is feature configurable as per the department requirement.
Work Flow Manager

Admin can authorize an employee (other than Admin) to create the workflow for other employees in the section, subsection or the organization.

Perform the following steps to assign workflow authority:

- Click on the Work Flow Manager module, as shown in Fig.199:

![Fig.199](image)

- Enter the data and click on the Submit button as shown in Fig.200:

![Fig.200](image)
• Select the organization and click on the Next (Next) button as shown in Fig.201:

```
<table>
<thead>
<tr>
<th>Serial No.</th>
<th>Employee Code</th>
<th>Employee Name</th>
<th>Designation</th>
<th>Global Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>E0008</td>
<td>Indu Chauhan</td>
<td>SECTION OFFICER</td>
<td>USER.DEPT.</td>
</tr>
</tbody>
</table>
```

Fig.201

• Select the Department, Office and Section name from Available column and move the selection to the Selected column as shown in Fig.202:

```
Select Organization unit
Global Organization Name - USER.DEPT.
Entity Name - SECTION
```

Fig.202

• Click on the Submit (Submit) button as shown in (Fig.202).
Perform the following steps to remove workflow.

- Click on the **Remove Workflow** button, as shown in **Fig.203**:

![Fig.203](image)

- Select the check box corresponding to the employee name and click on the **Remove Workflow** button as shown in **Fig.204**:

![Fig.204](image)
Alert Settings

Under this module, the user gets notification regarding sanctioning/approval of leaves via SMS, Email.

Below are the steps to change/view the Alert Settings:

- Click on the Alert Settings module. As a result, the page appears as shown in Fig.205:

![Fig.205](image)

Note:

Refer to Alert Settings module of the User Manual for the details of metadata fields.
Admin Assistant Role

Admin account comprises of fifteen different module:

- Apply LTC Encashment
- Exceptional Workflow
- Dashboard
- Consolidated Report
- Administration
- Apply
- Sanction Leave
- Pending Leave Request
- Reports
- My Leave status
- Notification Reports
- Approval Workflow
- Alert Settings

Let's have a quick overview of the different module one by one.

**Apply LTC Encashment**

*Note:*

**Apply LTC Encashment** is similar to the steps of Admin Role.

**Exceptional Workflow**

*Note:*

**Dashboard** is similar to the steps of Admin Role.

**Dashboard**

*Note:*

**Consolidated Reports** is similar to the steps of the Admin Role.

**Consolidated Report**

*Note:*

**Consolidated Reports** is similar to the steps of the Admin Role.
<table>
<thead>
<tr>
<th>Section</th>
<th>Note</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Note:</td>
<td><strong>Administration</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>Apply</td>
<td>Note:</td>
<td><strong>Apply</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>Sanction Leave</td>
<td></td>
<td><strong>Sanction Leave</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>Pending Leave Request</td>
<td>Note:</td>
<td><strong>Pending Leave Request</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>Reports</td>
<td>Note:</td>
<td><strong>Reports</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>My Leave status</td>
<td>Note:</td>
<td><strong>My Leave Status</strong> is similar to the steps of the Admin Role.</td>
</tr>
<tr>
<td>Notification Reports</td>
<td>Note:</td>
<td><strong>Notification Reports</strong> is similar to the steps of the Admin Role.</td>
</tr>
</tbody>
</table>
Approval Workflow

Note:

**Approval Workflow** module is similar to the steps of the Admin Role.

Alert Settings

Note:

**Alert Settings** is similar to the steps of the Admin Role.