

How to handle Time off in Lieu Leave in Totem

A group of our clients in Thailand requested the opportunity to manage Time off in Lieu for public holidays. This is how we do it in the current version of Totem:

You can decide to manage time off in lieu leave credits by adding them to an existing leave type, eg annual leave, or you can create a special type of leave for this. In this example, we'll create a leave type called Compensation leave to which we will add credits.

1. Firstly go to the **Settings | Leave Categories** and create a new type of leave called Compensation Leave. Create an abbreviation for this, eg COMP (this abbreviation will show on the calendar and various other places in the system).

Here is a picture of what the result should look like

The screenshot shows the 'New Leave Category' form in the Totem system. The form is titled 'New Leave Category' and is located in the 'Settings' section. The left sidebar shows a navigation menu with 'Leave Categories' highlighted. The main form fields include:

- Name:** Compensation Leave
- Abbreviation:** COMP
- Colour:** Black
- Filter When Not Used:** no
- Primary Annual Leave Classification:** no
- Associate With Dubious Leave Taking:** no
- Leave Send Mail Notification:** payroll, hr, other
- Leave Policy:** (empty text area)

There is also an 'add' button at the bottom right of the form.

2. Decide which profiles have users who will be eligible for this type of leave.

Dashboard Request Leave Leave History Pending Approval Calendar Employees Reports Mass Adjustments Settings

add record Leave Profiles leave profile report

Name: search clear

< > 1 show 10 results manage columns

Name	Active Employees	Options
Customer Service Profile	active (4)	
Default leave profile default	active (33)	
IT Support Profile	active (9)	
Sale Profile	active (9)	

< > 1 results: 1-4 out of 4

Organisation
» Overview
» Departments
» Locations

Employees
» Overview
» Employee Details
» Access Permissions
» Calendar Teams

Leave
» Overview
» Leave Categories
» Leave Profiles

Processes
» Overview

3. Edit the Profile and go to Compensation Leave

1. Make it active
2. Include Holidays: No
3. Required field: Probably no, but your internal policies may require this
4. Not limited
5. Leave on Probation: Up to your company policy
6. Balance Renewal: None
7. Leave Entitlement: 0
8. Check whether staff in other Profiles will need a similar adjustment.

– Compensation Leave 0 days

? Active: yes no

? Include Holiday: yes no

? Required Field: Reason
 Supporting Document

? Limited: not limited specific

? Leave on Probation: yes no

? Balance Renewal: annual topup none

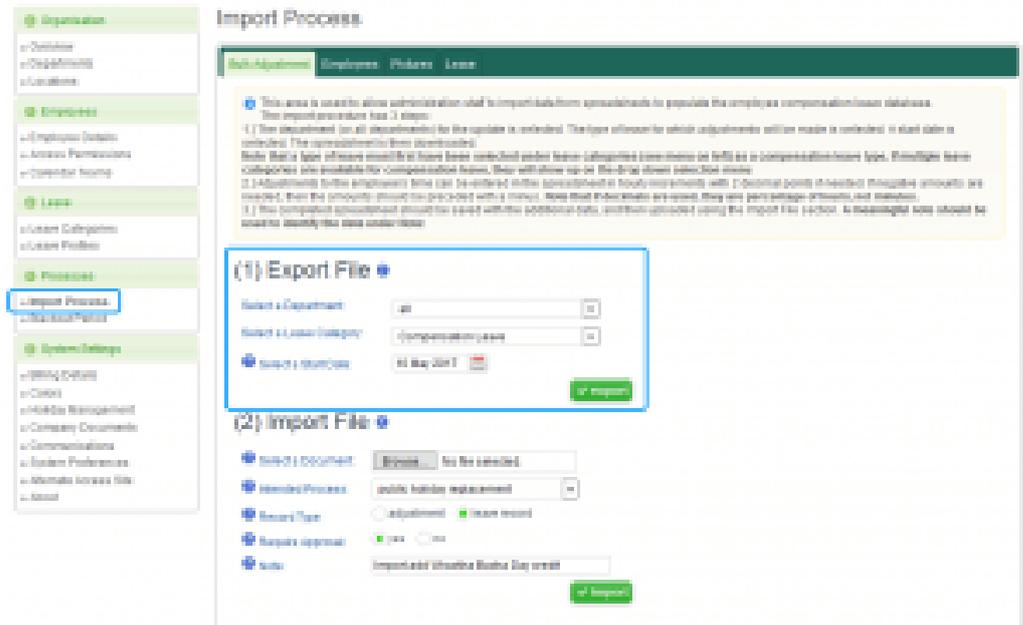
? Leave Entitlement: days

4. OK, so far so good. This leave entitlement will now be available to see for staff whom the leave policy applies to.

Stage 2. How do we get staff entitlements to show when they apply for leave? Well this is not difficult, and there are two different approaches. In our example, let's say a group of employees worked on 10 May Wisakha Bucha Day, a gazetted public holiday. Your company wants to give them a day off in lieu of working on the holiday. Here are the steps:

1. Go to **Settings | Import Process**.
2. Choose the tab **Bulk Adjustments**

3. Select one Department, or all departments.
4. Select the **Leave Category** Compensation Leave (or whatever you have called it).
5. Select the start date (in our example 10 May).
6. Export the spreadsheet file



7. Open the file and add the number of hours worked on the day (eg 8) in the correct column which shows next to the employees who worked on that date. If you want to provide a multiplier to the leave, eg double time, you could insert 16. This will be up to your Company's policy.

	A	B	C	D	E
1	Department	all			
2	Leave category	Compensation Leave			
3					
4	ID User	Staff Full Name (EN)	Staff Full Name (TH)	Staff Number	10 May 2017
5	1	Bella Lanee		4722	8
6	2	Chris Brown		2602	2
7	3	Dakota Swanepoel		3144	8
8	4	Jennifer Lopez		3568	2
9	5	Natalie Jagaciak		3636	4
10	6	Ryan Ribeiro		2374	8
11					

8. Save the file.
9. Now import the file.
10. Indicate the reason for the import at the Intended Process prompt: **Public Holiday Replacement**
11. Indicate whether this is an adjustment or a leave record: **Leave Record**
12. Indicate whether the details are forwarded to respective managers for approval, or whether the HR Admin can indicate no approval needed. This will depend on your Company's policy.
13. Add a note: **Import add Wisakha Bucha Day credit** or something that will help you in future identify what the leave credit was about.

- Organization
 - Departments
 - Locations
- Employees
 - Employee Details
 - Access Permissions
 - Company Name
- Leave
 - Leave Categories
 - Leave Profile
- Processes
 - Import Process
 - Export Process
- System Settings
 - System Details
 - Cities
 - Company Management
 - Company Documents
 - Communications
 - System Preferences
 - Admin Access File
 - Asset

Import Process

Sub-Adjustment
Employee
Process
Leave

ⓘ This area is used to allow administration staff to import data from spreadsheets to populate the employee compensation leave database. The import process has 3 steps:

1) The spreadsheet (an excel spreadsheet) to be updated is selected. The type of leave for which adjustments will be made is selected in start date is selected. The spreadsheet is then downloaded.

Note: Both file upload methods allow leave categories (compensation leave) to be left as a compensation leave type. However leave categories are available for Compensation leave, they will show up as Working time, which will mean:

2) Adjustments for employees will be calculated into spreadsheet in local spreadsheet with 1 column per employee (negative amounts are needed, then the amounts should be provided with a minus. Note that float values are used, they are percentage amounts, not integers.

3) The completed spreadsheet should be saved with the additional file, which will be used using the import file button. A message box will be shown to verify the data is correct.

(1) Export File

Select a Department:

Select a Leave Category:

Select a start date: Export

(2) Import File

Select a document:

Selected Process:

Leave Type: adjustment leave credit

Require approval: yes no

Note: Import

You're finished.

1. The manager's of the employee will now be notified of the leave credit and can approve or reject the leave credits.

Dear Emma,

Please review pending approval of compensation time for Compensation Leave as listed below.

Records for Review

Imported by: Loren

Import note: Import add Working Time Day credit

Employee(s)	Department	Date	Hour(s)
Bella Lopez	Direct Sales	30 May 2007	8 Hour(s)
Chris Brown	Admin	30 May 2007	2 Hour(s)
Dakota Swanson	Admin	30 May 2007	8 Hour(s)
Jennifer Lopez	Direct sales	30 May 2007	2 Hour(s)
Natalie Jagarski	Direct sales	30 May 2007	4 Hour(s)
Ryan Ribeiro	Direct sales	30 May 2007	8 Hour(s)

approve all
reject all
review

Dashboard
Request Leave
Leave History
Pending Approval
Calendar
Employees
Reports
Leave Adjustments
Settings

<input type="checkbox"/>	Adjustment Date	Leave Category	Employee Name	Department	Adjustment	Note	Approver	Status
<input type="checkbox"/>	20/05/14	Compensation Leave	Bella	Direct Sales	16 H	Import add Working Time Day credit	Emma	Pending
<input type="checkbox"/>	20/05/14	Compensation Leave	Chris	Admin	2H	Import add Working Time Day credit	Emma	Pending
<input type="checkbox"/>	20/05/14	Compensation Leave	Dakota	Admin	16 H	Import add Working Time Day credit	Emma	Pending
<input type="checkbox"/>	20/05/14	Compensation Leave	Jennifer	Direct Sales	2H	Import add Working Time Day credit	Emma	Pending
<input type="checkbox"/>	20/05/14	Compensation Leave	Natalie	Direct Sales	4H	Import add Working Time Day credit	Emma	Pending
<input type="checkbox"/>	20/05/14	Compensation Leave	Ryan	Direct Sales	16 H	Import add Working Time Day credit	Emma	Pending

Export approval
Export adjustment

2. After approval the leave will be available for staff to draw down on.

3. These adjustments will show in any relevant reports generated from Totem.

Note: The HR administrator can directly edit an employee's leave allowances in the following manner:

1. Go to Employees on the main menu
2. Select the employee to receive the adjustment
3. Under the tab **Leave Balances** edit the type of leave to be adjusted by clicking the **Edit** icon

The screenshot shows the HR system interface for an employee named Dakota Fanning. The top navigation bar includes 'Employees', 'Reports', 'Mass Adjustments', and 'Settings'. The 'Employees' tab is active, showing the employee's profile with a photo and details: Direct Manager (Emma Stone), Department (Dard State), E-mail (dofanning@campus.iaa), Position (ns), Date Join (2016/03/01), Length of Service (5 years 03), and Leave Profile (Default leave profile). To the right, the 'Leave Balances' tab is active, displaying a table of leave types and their balances.

	Entitlement	Taken	Balance	
Annual Leave	120.0h	0h	120.0h	
Sick Leave	240.0h	0h	240.0h	
Business Leave	60.0h	0h	60.0h	
Maternity Leave	60.0h	0h	60.0h	
Compensation Leave	0h	0h	0h	

4. Make the adjustment making sure that a clearly understandable reason is provided (useful in 6 months time!) and make the adjustment.
5. You're done!

The screenshot shows the 'Leave Entitlement Adjustment' dialog box. It contains the following information:

- Date: 2017/09/28 14:08 PM
- Change By: Emma Stone
- Leave Category: Compensation Leave
- Year: 2017
- Entitlement: 0 hour(s)
- Adjustment: add deduct
- Reason: Wisakha Bucha Day credit

The 'Adjustment Result' section shows:

- Old Entitlement: 0 hour(s)
- New Entitlement: 1 day(s) 0 hour(s)
- Reason Logged: Wisakha Bucha Day credit

An 'adjust' button is located at the bottom right of the dialog box.