

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 application. The left sidebar contains a navigation menu with the following sections: Organisation, Employees, Leave, Processes, and System Settings. The 'Leave' section is expanded, and 'Leave Categories' is highlighted. The main form area is titled 'New Leave Category' and contains the following fields and options:

- Name:** A text input field containing 'Compensation Leave'.
- define different label for other languages:** A checkbox that is unchecked.
- Abbreviation:** A text input field containing 'COMP'.
- Colour:** A color selection field showing a black color.
- Filter When Not Used:** Radio buttons for 'no' (selected) and 'yes'.
- Primary Annual Leave Classification:** Radio buttons for 'no' (selected) and 'yes'.
- Associate With Dubious Leave Taking:** Radio buttons for 'no' (selected) and 'yes'.
- Leave Send Mail Notification:** Checkboxes for 'payroll' and 'hr', both unchecked. An 'other:' label is present below these checkboxes.
- select email:** A text input field.
- Leave Policy:** A large text area for entering the leave policy.
- define different policy for other languages:** A checkbox that is unchecked.
- add:** A green button with a checkmark and the text 'add'.

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

Organisation
» Overview
» Departments
» Locations

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

Leave
» Overview
» Leave Categories
» Leave Profiles

Processes
» Overview

+ 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

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: 0 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

- o/Overview
- o/Department
- o/Location

Employees

- o/Employee Details
- o/Access Permissions
- o/Computer Setup

Leave

- o/Leave Categories
- o/Leave Profile

Processes

- o/Import Process
- o/Export Process

System Settings

- o/Setup Details
- o/Config
- o/Module Management
- o/Company Documents
- o/Communications
- o/System Preferences
- o/Alternate Access File
- o/About

Import Process

Sub-Adjustment

Employees

Process

Leave

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

1. The spreadsheet (or all spreadsheets) for the update is selected. The type of leave for which adjustments will be made is selected in start date is selected. The spreadsheet(s) are downloaded.
2. The file type of leave must be a leave type selected under leave categories (see items 2a below) as compensation leave type. Otherwise leave categories are available for Compensation leave, they will show up as the (not) leave selected item.
3. Adjustments follow employee file (or 2a entered) in the spreadsheet in leave requests with 1 decimal point if needed. Negative amounts are needed, then the amounts should be preceded with a minus. Note that if decimals are used, they are percentage amounts, not minutes.
4. The completed spreadsheet should be saved with the additional file, which is created using the Import file button. A message box should be used to notify the data administrator.

(1) Export File

Select a Department

all

Select a Leave Category

Compensation Leave

Select a Start Date

10 May 2017

Export

(2) Import File

Upload a Document

Browse

No file selected.

Selected Process

update holiday replacement

Record Type

☐ Adjustment
 ☒ Leave record

Requires approval

☒ Yes
 ☐ No

File

Import add Winkha Bucha Day credit

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 Winkha Bucha Day credit

Employees	Department	Date	Hour(s)
Bella Loren	Direct Sales	10 May 2017	8 Hour(s)
Chris Brown	Admin	10 May 2017	2 Hour(s)
Dakota Swanson	Admin	10 May 2017	8 Hour(s)
Jennifer Lopez	Direct sales	10 May 2017	2 Hour(s)
Natalie Jagarick	Direct sales	10 May 2017	4 Hour(s)
Ryan Ribeiro	Direct sales	10 May 2017	8 Hour(s)

approve all

reject all

review

Dashboard	Request Leave	Leave History	Pending Approval	Calendar	Employees	Reports	Leave Adjustments	Settings
	Adjustment Date	Leave Category	Employee Name	Department	Adjustment	File	Approver	Status
<input type="checkbox"/>	20170514	Compensation Leave	Bella	Direct Sales	10 1h	Import add Winkha Bucha Day credit	Emma	Pending
<input type="checkbox"/>	20170514	Compensation Leave	Chris	Admin	2h	Import add Winkha Bucha Day credit	Emma	Pending
<input type="checkbox"/>	20170514	Compensation Leave	Dakota	Admin	10 1h	Import add Winkha Bucha Day credit	Emma	Pending
<input type="checkbox"/>	20170514	Compensation Leave	Jennifer	Direct Sales	2h	Import add Winkha Bucha Day credit	Emma	Pending
<input type="checkbox"/>	20170514	Compensation Leave	Natalie	Direct Sales	4h	Import add Winkha Bucha Day credit	Emma	Pending
<input type="checkbox"/>	20170514	Compensation Leave	Ryan	Direct Sales	10 1h	Import add Winkha Bucha Day credit	Emma	Pending

approve adjustment

reject 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 tabs like Dashboard, Request Leave, Leave History, Pending Approval, Calendar, Employees, Reports, Mass Adjustments, and Settings. The 'Employees' tab is selected. On the left, there's a profile card for Dakota Fanning with fields for Direct Manager, Department, E-mail, Position, Date join, Length of Service, and Leave Profile. On the right, the 'Leave Balances' tab is active, displaying a table with columns: Entitlement, Taken, Balance, and an Edit icon.

	Entitlement	Taken	Balance	
Annual Leave	120.0h	0h	120.0h	
Sick Leave	360.0h	0h	360.0h	
Business Leave	60.0h	0h	60.0h	
Maternity Leave	80.0h	0h	80.0h	
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 a 'Leave Entitlement Adjustment' dialog box. It contains the following fields and options:

- 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

Below these fields, the 'Adjustment Result' is shown:

- 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.