

Changes in the “August Eclipse” version of Totem

We’ve been hard at work at GainPlus providing some extra functionality to our award winning Totem Leave Management software. Following user feedback we now cover the following:

How many hours a day?

Firstly, we’ve rejigged our database backend so that we now handle times by the hour! Previously we handled full days, half days and quarter days but some of our companies using Totem (you know who you are!) requested the ability to handle leave by the hour, and so this release brings it to you. To deliver these changes, we’ve had to update lots of screens and reports, but now it’s done, and it’s awesome!

Your users will see these changes when they apply for leave. They can select a specific time for leave and they can then choose the starting time and the number of hours requested.

The screenshot displays the leave request form in the Totem software. It includes the following elements:

- Select Your Leave Category:** A dropdown menu set to "Annual Leave" with a "current balance 7 day(s) 4 hour(s)" indicator. Below it, a note states "Annual leave need to submit at least 7 days in advance".
- Input The Duration:** Three radio buttons: "single day", "multiple days", and "specific time" (which is selected and highlighted with a blue box).
- Select Leave Period:** A date picker showing "2017/09/01".
- Time Selection:** A section with a "start time" label, a clock icon, a dropdown menu set to "1", and the text "Hour(s)". Below this is a grid for selecting the time of day:

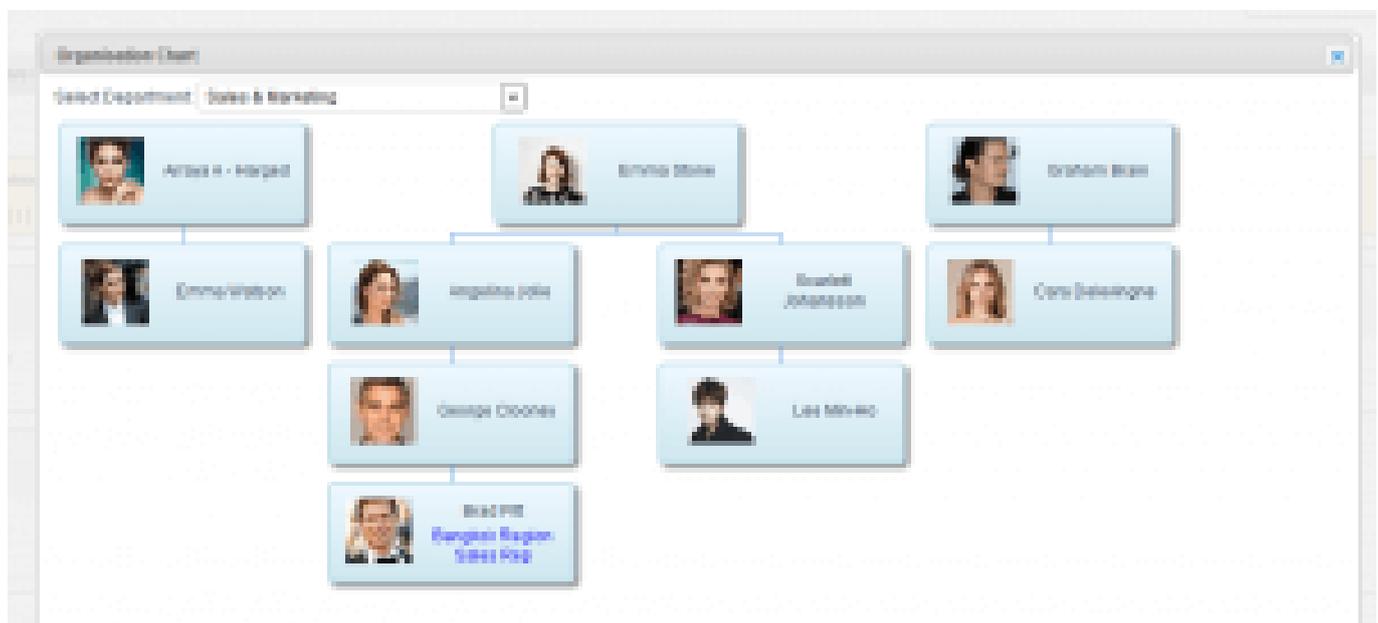
	Hour						Minute
AM	12	01	02	03	04	05	00
	06	07	08	09	10	11	15
PM	12	01	02	03	04	05	30
	06	07	08	09	10	11	45
- Supporting Document:** A section with a "Browse..." button and the text "No file selected."
- Buttons:** At the bottom right, there are two buttons: a green "request" button and a grey "cancel" button.

Users will also see the new display in their leave balance table, which now shows days and hours.

	Entitlement	Taken	Balance	
Annual Leave	16d 0h	14d 4h	1d 4h	i
Sick Leave	20d 0h	4d 0h	16d 0h	i
Business Leave	10d 0h	1d 0h	9d 0h	i
Buddhist Ordination Leave	10d 0h	0h	10d 0h	i
Compassionate Leave	5d 0h	0h	5d 0h	i
Military Leave	30d 0h	0h	30d 0h	i

Organisation Charts

We've included the ability to display organisation charts under the **Employees** menu option. The idea is that these charts provide overview to senior management to readily view the structure of departments and also to allow HR managers to quickly see any orphaned staff who don't have a manager assigned! We may bring extra functionality to this area in future, so don't forget to give us your feedback.



Two Tier Leave Approval

For those of you that have a multi level approval structure, we've now got you covered.

HR Admins can choose whether the company requires this, and if needed the setting can be managed at the user settings level. When inputting the approval manager, a second level leave approver can be turned on, and if selected this will default to the first leave approver's manager,

but the system will allow any staff member to be selected. A picture being better than a thousand words, so this is what it looks like:

The screenshot shows a user profile form with the following fields:

- Personal Information:** First Name, Last Name, Local First Name, Local Last Name, Login, E-mail, Staff ID, Password (with options for 'user will set it on first login' or 'set password').
- Work Information:** Department (Customer Service), Location (Bangkok), Position, Direct Manager (Rupawan Gasipoka).
- Approval Settings:** Leave Approver #1 (manager), Leave Approver #2 (manager of 1st approver).
- Other Settings:** Allow Access via Alternative Access (Site) (PP, PMS), Status (active, inactive), Nickname, Access Permissions (Staff).

When checking status of a leave application, the table displays progress:

Leave ID	Requester	Period	Leave Category	Reason	Leave Approver #1	Leave Approver #2	Status
20170104	Fajar	14 Dec	Annual Leave		Amber	Green	Pending
20170123 (18:00 - 18:00)	Erick	2h	Business Leave	Impromptu visit	Amber		Pending
20170124 (afternoon)	Caroline	6h	Annual Leave		Amber		Pending
20170125 (morning)	Anisa	6h	Sick Leave	Headache	Green	Amber	Pending
20170127 - 20170128	Jessica	24 Dec	Annual Leave	Family visit	Green	Green	Pending

Next to the leave approver's name is a status light, with four possibilities, green to indicate approved, amber to indicate still pending with the leave approver, white, not yet available to the approver (for instance when the first approver has yet to process it) and finally red, if the application has been rejected.

Leave applicants can see this display in their history, and will receive mail notification on approval. If the approval process is delayed beyond the specified period (the default is 3 days) an email notification is sent to the HR admin.

A final note, this process when selected is not **either / or**, but is sequential, ie **first**, then **second**.

Blackout Periods

Some employers have a requirement to restrict staff from taking leave during specified periods, for instance, perhaps the accounting department may want to limit staff leave during their busy period at the end of a month, or hotels may want to limit leave over the new year's break when they expect to be ultra busy. In most cases all that is required is to remind staff when one of the restricted periods is in place. How does this work? Well firstly a manager would request the HR Admin to set up a blackout period by providing details of the date(s) and the staff affected (individuals or departments).

New Blackout Period



Name:

Blackout Period:

Status: Active Inactive

Location:

Employee List:

add

After this information has been updated to the system it will be shown at the time an employee is applying for leave during a “blackout” period:

Select Your Leave Category:

Annual leave need to submit at least 7 days in advance

Input The Duration:

single day multiple days specific time

Select Leave Period:

August 2017						
Sa	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

request cancel

Two notes:

1. The calendar display will only show for staff affected
2. The existence of a blackout period does not prevent staff from applying for leave, there may be good reasons why leave is needed, however at that point, the employee is aware of the “blackout” period, and ultimately a request for leave will always require the approval or otherwise of the employee’s manager.

The system calendar also shows these “blackout” periods.

Recording Time off in Lieu, or Compensation Time

Many industries allow staff to accrue time off when they have worked beyond their scheduled hours or have worked on a public holiday or other time off periods.

Totem now allows admins to simply import these times and store the periods against a particular defined leave type.

The import process is simple and involves two steps. Firstly a spreadsheet is generated for the type of leave and the department, and then the system generates a spreadsheet containing staff names and information - English / Thai names; Staff ID; and department; and then 7 columns headed by a date allow the timekeeper to fill in the information either for a particular day or a for a full week or a part of a week. After updating, the spreadsheet is re-imported to Totem.

Import Process

Compensation Time Employees Pictures Leave

import compensation guideline

Export File

Select a Department: all

Select a Leave Category: Compensation Leave

Select a Start Date: 2017/06/05

Export

Import File

Select a Document: Browse... No file selected

Note: Import by Papat.com

Import

The text box for the Note takes free form information and will display in the user history details against the changes once they have been approved by the respective manager.

Approval. There are two ways that the imported data can be approved by a manager. Firstly, after import has been completed, an email is sent to the manager indicating details of the imported leave and from this mail, a manager can approve or reject the leave.

Dear Candice,

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

Records for Review

Imported by: Nagasorn

Import note: Import by Nagasorn (30 Aug 2017)

Employee	Department	Date	Hour(s)
Cass Delevingne	Accounting	04 Sep 2017	2 Hour(s)
Cass Delevingne	Accounting	05 Sep 2017	4 Hour(s)
Katy Perry	Accounting	04 Sep 2017	6 Hour(s)
Laura Vasca	Accounting	05 Sep 2017	2 Hour(s)
Selena Gomez	Accounting	05 Sep 2017	2 Hour(s)

approve all

reject all

review

Note that by managing by email, there is no granularity of approval - all records are either approved or rejected. However, a manager may decide to handle the approvals via their browser. Under the menu item **Compensation Leave** any pending approvals can be approved or rejected on a line by line basis:

Table with 8 columns: Selection, Adjustment Date, Leave Category, Employee Name, Department, Adjustment, Approver, Status. Includes rows for Cass Delevingne, Katy Perry, Laura Vasca, and Selena Gomez with their respective leave requests and approval status.

Reports

Well, apart from updating a lot of reports, we've added some new reports as well. Here is a capture of a new report showing hours:

Name	ID	Department	First Approver	Final Approver	Leave Date	Period	Leave Category	Request Date	Review Date	Result
Max Bell	1221	Accounting	ElleParving	ElleParving	27 Aug 2017	20 21	Sabbatical Leave	25 Aug 2017	28 Aug 2017	Approved
Jennifer Lopez	1081	Accounting	ElleParving	ElleParving	28 Aug 2017	21 21	Compensation Leave	28 Aug 2017	28 Aug 2017	Approved
Neil LaBine		Accounting	ElleParving	CassDelevingne	04 Aug 2017	21 21	Annual Leave	20 Aug 2017	28 Aug 2017	Rejected
Selena Gomez		Accounting	ElleParving	CassDelevingne	07 Aug 2017	21 21	Sick Leave	07 Sep 2017	08 Sep 2017	Approved
Troye Sivan		Accounting	ElleParving	CassDelevingne	28 Aug 2017	21 21	Sick Leave	28 Aug 2017	28 Aug 2017	Rejected

We also have the following new reports:

- Department Report

- Location Report
- Access Permission Report
- Leave Profile Report

We encourage you all to run all of these reports and see your data in PDF, Excel or Word format.

Other Import Processes

It is now possible import staff photographs by the HR Admin (if allowed by HR, the user can update their own photos but remember that if staff upload avatars instead of photos, this may not be useful for management purposes). Photographs can be in JPG or PNG format and should use the StaffID of the employee followed by the file extension as the name of each file eg S1234.png

As HR may find it easier to import staff details from a spreadsheet or update leave history by a spreadsheet we've provided for these activities too. All of these are accessed under the **Settings Menu**.

Import Process

Adding Staff to Groups

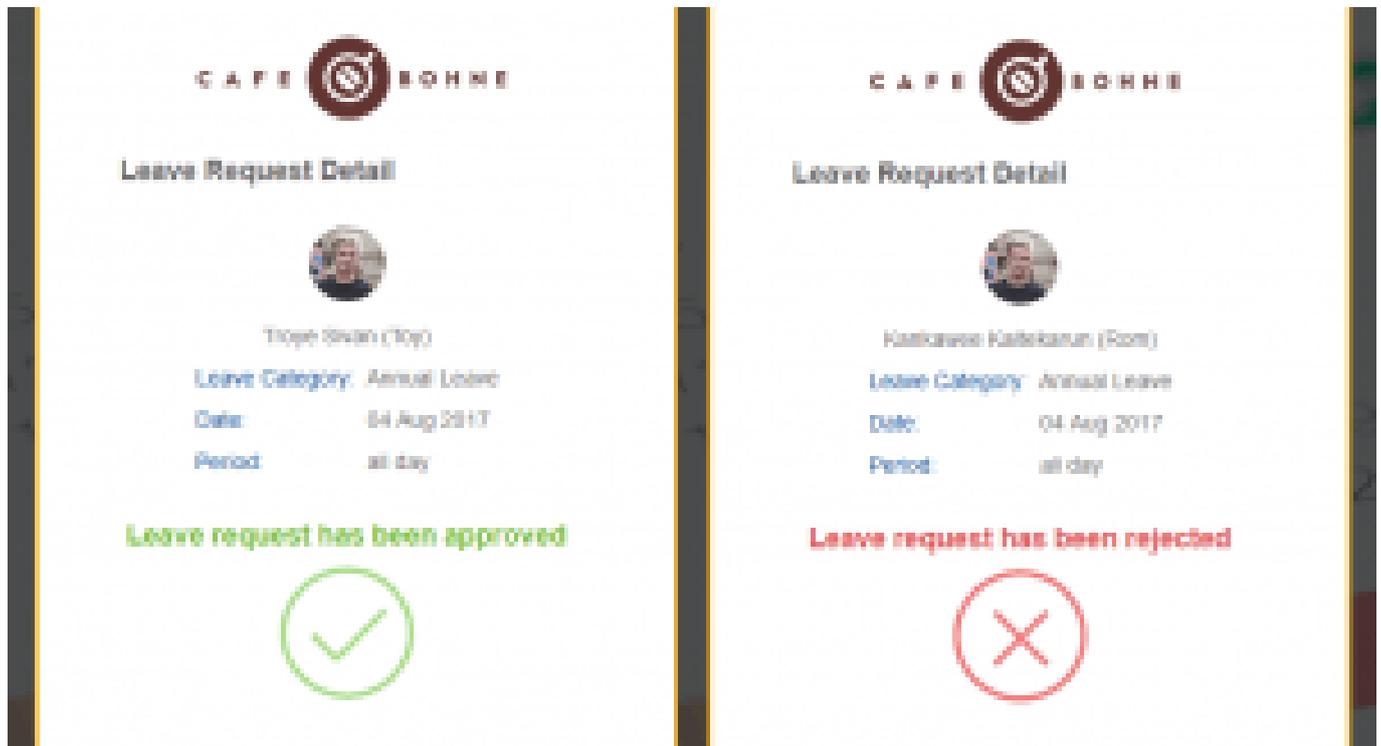
We've simplified the way staff can be added or transferred between the various groupings: Departments; Locations; Access Permissions and Leave Profiles. Simplifying this will help with the initial setup, as well as changes during an employees normal employment cycle.

Approval Results

Finally, for the leave approvers amongst you, we've provided some more confirmation clarity when you approve or reject mail from emails. In the past, clicking on approve opened a browser window

and a small message was displayed on the login page. Well we've changed that and we now display more information with more clarity regarding the process:

The Leave Request Approval:



Compensation Time approval



Mobile App

We've added some extra functionality to the web app (Android iOS and Windows phone) so that now a manager can go to the **My History** menu (now changed to just **History**) and by clicking on the drop down menu, see a list of subordinates, select any one of them, and the application will show the leave history of that employee. Neat eh?



Well that's it for this month's changes. We're expecting a few more changes during October, and if you would like to see something we're not doing, drop us a line at [email-obfuscate email="totem@gainplus.asia"] and we'll get back to you. We'd love to hear from you. From now until the end of the year our team's focus will be on delivering our exciting Payroll module which we believe will be a major contribution to how small, medium and large companies in Thailand will simplify their payroll processes and get extensive graphic and analytical reporting along with it.