

Module 8: HR MANAGEMENT

8.1 Module Overview

Every company has some Human Resource function and properly managing workforce records is critical. But continuing to work with paper files is not only archaic and cumbersome, but a huge security risk, especially when processing, storing, or sharing confidential information such as employee applications or background checks, health insurance forms, performance reviews, reprimands, or financial information. Implementing the HR Module in POSibolt is a popular and forward thinking approach to improving Human Resource functions. Let us check how we can manage employee details by adding departments, designation, field of study, graduation and adding employees.

Objectives

- Discuss how to manage the employee details of your company.
- Describe how to add and manage the working shifts of your employees.
- Describe how to add and view the attendance details of the employees
- Add training details and track the details.
- Create observership types and details of employees.
- Discuss about new vacancies and how apply for job.
- Discuss the recruitment management.
- Describe how an employee can apply for a leave.
- How an employee can apply for termination.

8.2 EMPLOYEE MANAGEMENT

An employee management system is an information system that supports the relationship between a company and its employees. Employee relationship management has focused on enabling employees to collaborate on typical managerial tasks with their employers.

Employee Details
Designation
Education
Experience
Identity
Appreciation
Disciplinary
Bank Account Details
Training Details

Employee Details

<p>Organization* <input type="text"/></p> <p>Employee ID <input type="text"/></p> <p>First Name* <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Phone <input type="text"/></p> <p>Email <input type="text"/></p> <p>Employee Category* <input type="text" value="Employee"/></p> <p>Current Designation* <input type="text" value="Accountant"/></p> <p>Gender <input type="text"/></p> <p>Blood Group <input type="text"/></p> <p>Emergency Contact No <input type="text"/></p> <p>Spouse <input type="text"/></p> <p>Relieved Date <input type="text" value="dd-mm-yyyy"/></p> <p>Contract Period <input type="text"/></p> <p>Contract Expiry <input type="text" value="dd-mm-yyyy"/></p> <p>Room No <input type="text"/></p> <p>Place of Birth <input type="text"/></p> <p>Reporting To <input type="text"/></p> <p>Languages <input type="text"/></p> <p>Temporary Address <input type="text"/></p> <p>Employee Status <input type="text"/></p>	<div style="border: 1px solid #ccc; width: 100px; height: 100px; margin-bottom: 10px; display: flex; align-items: center; justify-content: center;"> + </div> <p>Date of Birth <input type="text" value="dd-mm-yyyy"/></p> <p>Mobile No <input type="text"/></p> <p>Personal Email <input type="text"/></p> <p>Department* <input type="text" value="Accounts"/></p> <p>Nationality <input type="text"/></p> <p>Marital Status <input type="text"/></p> <p>Emergency Contact Person <input type="text"/></p> <p>Father <input type="text"/></p> <p>Join Date <input type="text" value="dd-mm-yyyy"/></p> <p>Contract Status <input type="text" value="Permanent"/></p> <p>Signature <input type="text" value="Browse... No file selected."/></p> <p>Is Eligible for OT <input type="text"/></p> <p>Next Appraisal <input type="text" value="dd-mm-yyyy"/></p> <p>Registration No <input type="text"/></p> <p>Travel & Accommodation <input type="text"/></p> <p>Permanent Address <input type="text"/></p> <p>Remark <input type="text"/></p>
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ATTACHMENTS
SAVE
BACK

In POSibolt, From main menu navigate to HR Management → Employee Management, help to manage the employee details of your company

Clicking on Create New, will help to add new employee details. In the Employee Management screen, you can see many tabs for entering the details like: Department, Designation, Education etc..

Before creating the employee details these must be added to the system.

Department

In the Department screen, user can CREATE NEW departments of organization. So that, when creating employee details, can choose the department for that employee.

Navigate to **HR management → Department**

Search for the existing departments. It lists all the departments in all organization. Either you can search by selecting particular organization or by department name. Also edit them using Edit button, if want to make any changes in the departments.

Create New Departments

Click on the Create New Button. It will be directed to the page where the user can Enter the details in the form:

Fields	Description
Organization	If any specific organization is selected then this department will be visible to only that organization. If you wish to list the departments in all organizations then you must choose *.
Department Name	Enter the name of the department
Department Code	Enter the code for new department.
Is Work Request In Charge	If checked, the department will be available for the Work Request Scenario.
Is Medical Department	Put a check on the check box ,if the Department you are creating is related to Medical Field else make it unchecked.

Click on **Save Button**.

Designation

Create designations which offer to employees so that they will appear while creating employee details.

Navigate to HR Management → Designation.

Search button lists all the designations in all organization. Either search by selecting particular organization or by job name. Using Edit button, if want to make any changes in the designations.

Create New Designation

Click on the Create New Button in the Designation

Enter the following details.

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Job Name	Enter the name of the designation to be created in the Job Name text box.

Click on **SAVE Button**. A new designation will be created under the selected organization.

Academic Degree

This part handles the graduation courses available. Enter the courses here, so that while creating employee details it is easy to choose the course from the drop down.

Navigate to **HR Management → Academic Degree**, will get the page where can *Create*, *Search* and *Edit* the courses. To create new courses, click on *Create New*. When click on Create New, get a page to enter the details;

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Degree	Enter the Name of the degree to be created in the Degree text box.

Click on **SAVE**.

Area Of Specialization

In this screen, user can save different fields of specialized knowledge that could add to an employees qualification. From main menu navigate to HR management → Area of Specialization ,will direct to the page where can *CREATE*, *SEARCH* and *EDIT* the fields.

Search for existing area of specialization using *SEARCH* button. It list out all the area of specialization in all organization. Either search by selecting particular organization or by field of study. Edit them using Edit button,if want to make any changes .

Create A New Area Of Specialization

Click on Create New button, will be directed to a new screen to enter the details.

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Field Of Study	Enter the name of the field to be created in the Field Of Study Text box.

Click on Save Button

Disciplinary Action

The disciplinary actions that are set in your company policies can be added to POSibolt using the Disciplinary Action Menu.

Search for existing disciplinary action using *SEARCH* button, and create a New Disciplinary action using *CREATE NEW*. When click on Search , it list out all the disciplinary actions in all organizations. Either search by selecting particular organization from drop down or by name. Also edit them using Edit button, to make any changes .

Create New Disciplinary Action

Click on Create New ,a new screen got generated, to enter the details.

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Name	Enter the name of new disciplinary action .

Click on **SAVE Button**.

These values can be found in the drop down in employee details page by clicking on the disciplinary tab

Identity

The proof of identity which the employees submit at the time of joining can be tracked. Just create the type of proof submitted like: Passport, driving license, Aadhar card etc..

Search for all existing identities and also create a new identity. When click on SEARCH button will get a screen listing all identities in all organization if * is selected from the organization drop down. Also search identities for particular organization by selecting the organization from drop down, O search by identity name. Also Edit them using EDIT button, if want to make any changes.

Create A New Identity

Click on **CREATE NEW**, a new screen where the details want to be entered will generated.

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Name	Enter the name of new identity.

Click on Save.

Employment Status

We need to update the status of the employee like On Roll, Off Roll, Resigned, Relieved etc. We need to provide this status while creating an employee details. The status needs to be created from this screen.

Search for the existing status uploaded using SEARCH button. If search by selecting * organization, it lists all the statuses uploaded in all organizations. Also search status of particular organization by selecting the organization name from drop down, or by name of the status. Edit the status from here using **EDIT** button, and make the changes needed.

Create A New Employment Status

To upload a new status , Click on **Create New**, will got a screen to enter the details.

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Name	Enter the name of new status.

Click on Save.

Employee Category

The employees can be categorized based on different categories like Doctors, Nurse, Staffs etc. To create a new category Navigate to HR management → Employee Category .

In this screen search for existing categories using *SEARCH* button and create a new category using *CREATE NEW*. Click on Search button, it list out all the categories in all organizations if * organization is selected. Also search for categories of particular organization by selecting organization from drop down, or search by category name. Edit the category using *EDIT* button to make any changes needed.

Click on Create New, A new screen for enter the details will got appeared

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Name	Enter the name of new category.
Is Medical Department	Put a check on the check box,if the Department you are creating is related to Medical Field else make it unchecked.

Click on Save Button.

Contract Type

Contract is the valid agreement between the organization and Employee which contains the offer and acceptance. In Employee management , when creating a new employee, you want to select the contract type for that employee ,which is already created in contract type screen.

To create a New Contract type navigate to HR management → Contract Type. You got a screen where you can search for existing contract types using SEARCH button. You can edit the contract types from here using EDIT button, if you want to make any changes.

Create New Contract Type

To create a new contract type, click on CREATE NEW; a new screen will appeared to enter the details .

Fields	Description
Organization	Enter the organization name, on which you want to create a new designation. If you want to create a new designation, which want to list in all organizations, select * from the drop down.
Name	Enter the name of new contract type.

Click on Save button.

8.3 Employee Reports

User can get a report of total employees in all Departments. To get various search criteria to narrow down preferred search. Clicking on the total number of employees will display all the employee details with their ID, Name, Department and Designation.

Fields	Description
Select Report	Select the type of the report to generate. Two reports are available: Monthly reports and Other reports
Search By	For Monthly Reports the search by fields display: <ul style="list-style-type: none"> ✓ Current Staff Strength – Displays the total strength of employees ✓ Gender/Age report – Displays report with gender / age differences ✓ New Joined Employees – Report for new joined employees ✓ Resigned or Joined – Report for all the resigned or joined

	<p>For Other Reports</p> <ul style="list-style-type: none"> ✓ Resignations ✓ Addition/Joining ✓ Attrition / Turn Over
Group By	Group the search result based on the Department or Location.
Organization	Select the organization, for which you need to generate the report
Month	Select the month for which you wish to generate the report
Year	Select the year from the drop down.

EMPLOYEE REPORTS

Select Report: Monthly Reports | Search By: Current Staff Strength | Group by: Department | Organization: Posibolt Calicut | Month: Jan | Select Year: 2017 Q SEARCH

4 Items Found, Displaying All Items 1

Employee Report: Search By: Current Staff Strength And Filter By: Department	
Department Name	Total No of Employees
Software Development	12
Accounts	1
QA	21
System Administration	7

Export options: [CSV](#) | [RTF](#) | [PDF](#)

Total strength: 41

8.4 SHIFT

POSibolt allows to add and manage the working shifts of employees. First, need to feed the system with the working shifts of company. And then schedule shifts for each employees.

Procedure: Creating New Shifts

From main menu navigate to HR Management → Shift. View existing shifts and edit them from here.

To create new shifts, click on **Add Shift button**. will displays a pop up box

to enter the details.

- **Code** : Enter the code of shift
- **Name** : Enter the name of the shift
- **Time**: Enter the **working time** of the shift
- Click on **Save**.
- A new shift is created.

8.5 Shift Scheduler

To schedule a shift for employee or import shift as a csv file to the system
Navigate to HR management → Shift scheduler.

- Search for the shift details for the employees using the Search Button.
- Narrow the search by using the filters such as employee name, Description, Month& Year, Location, Sub Location and Organization.
- Also export the shift details into a PDF or CSV file using the respective buttons.

To import shift details of many employees at a time,

- Click on the **IMPORT** button.
- Browse the file which should be in a csv format and import it.

Procedure: Assign New Shift

To assign a new shift to an employee Click on **Add New** , will get a **Assign Shift screen** to enter the shift details of an employee.

- Select the organization and Location From the drop down
- Enter the Employee Name
- Select the Shift
- The timings for the selected shift will be shown in the Shift Timing field
- Select the Dates from the calendar
- Click on Assign
- Click on Save to save the details

New shift will assigned for employee and it will list out in the shift scheduler screen when search.

8.6 ATTENDANCE MANAGEMENT

From main menu, Navigate to HR Management → Attendance Management, to view the attendance details of the employees.

The attendance of the employees are imported into the system. After preparing the csv file, do the following.

- Click on the **Import Button**.
- It will displays a pop up box asking for the csv file. **Upload** the file and click on **OK**.
- If all headers have been correctly inserted, the attendance of the employees will be successfully uploaded into the system.
- To Search the attendance details of an employee Click on Search, will list out all the attendance details of all employees
- Also narrow down the search by using the filters Employee ID, Employee name , Department etc.
- To Edit the details of each employee, click on the EDIT button

8.7 TRAINING

If a company is conducting any courses or workshops - that can be added in the Training Management. Also invite employee to attend the training. Track who all has attended and who all are yet to attend.

Procedure: Adding A Training Category

This is self explanatory. You are creating a new training category. This is used to categorize the courses you are offering.

Here *Edit* the existing category using EDIT button, to make any changes.

Creating A New Training Category

To create a new training category, click on ADD NEW , a pop up screen will got generated and there enter the new category name and SAVE . It will list out in the category list.

Enter the category Name and click on SAVE.

Creating New Category

In this panel, users are creating a *course name* and assigning the training to a particular department. While doing so only the employees in that department can attend the course. Also get a report of who all have not attended from that department.

In POSibolt, Navigate to **HR MANAGEMENT → Training**, It list out all the existing training with details. Also edit the training using EDIT button to make any changes for the training details.

Procedure: Add A New Training

Click on **ADD TRAINING**, you will get a new pop up screen and where you want to enter the details.

- Choose the department to which is training is conducted.
- Choose the category name.
- Set the frequency of the training like:
 - ✓ Yearly
 - ✓ Quarterly
 - ✓ Monthly
 - ✓ Weekly
- Duration want to be entered in hours (total hours for the training).
- Enabling Mandatory means that training must be attended by all.

After assigning a training to a department it needs to be approved. After approval it will be listed under the Training Management Screen.

8.8 Training Management

In this page you can search for all training details such as frequency, start and end date, status, faculty name .

Click on **EDIT** button you get a new screen, there you can make any changes if you want in training details.

The training status, as highlighted in the above fig, can be changed. You can change the status to

- Scheduled

- Postponed
- Completed

These status will allow you to add the employee attendance. In this page you can enter the Faculty name, Start and end date of the training.

Adding Employees

The *Add Employee* button will display a pop up box where you can manually add employees.

The *Upload employee* button helps to import the csv list of employees to the system.

The Upload button found in the Action column for each employee is to Import their feedback of the training.

Feedback On Training

Others also can give feedback on training. If it is any Head Of the Department, you can choose it from the drop down.

Training Report

The training report will generate the details of the people who has attended the training and who has not.

8.9 OBSERVERSHIP

An Observer-ship occurs in medical school. During Observership, students observe and participate in clinical activities with the objective of both understanding and gaining practical experience working within it. Such programs also encourage strong relationships between the two institutions involved in the Observer-ship as well as between the students of each educational institution. In POSibolt, it is easy to create types and details of employees or students who is participating in such observer-ships conducted by organization.

Observer-ship Types

For creating observership types, In POSibolt, Navigate to **HR management** → **Observership Types**, a screen for searching existing types and also for creating a new one.

Click on SEARCH button, it directed to a screen which list out all the existing observership type in all organization. Either search by selecting particular organization or by name. To make any changes, edit them using EDIT button.

To create a new observership type, click on CREATE NEW, a screen for entering the details will be appeared.

Fields	Description
Organization	If any specific organization is selected then this observership type will be visible to only that organization. If you wish to list the types in all organizations then you must choose *.
Name	Enter the name of the observership type.

Click on **Save**. It will be added to the list.

Observership Details

From main menu navigate to HR management →Observership details , it will be directed to a screen to search for existing details of persons who is doing observership. Also create a new one from this screen.

Click on SEARCH button, it list out all the observership details in all organizations with all status . Narrow the Search by particular department, status or observership dates. Also edit the details from here using EDIT button, to make any changes .

To Create a New , Click on CREATE NEW , a new screen for enter the details will be appeared.

- Enter the details here.
- Click on Save button.
- Observership Types created in Observership Type Screen will be shown in the dropdown menu of observership type in this screen.
- Select the Observership status from the dropdown menu which is mandatory.

8.10 JOB OPENING

Job opening is a job vacancy. The organizations want to hire somebody for a new post, replace any employee or for a vacancy in old post. For hiring new employees, you want to post the details of new openings and vacancies. Then only any candidate can know about new vacancies and can apply for job.

For entering the details for job openings ,From main menu navigate to **HR management → Job Opening**, a screen for searching the existing vacancies and creating a new will appeared.

When click on Search button, it list out all the existing openings with details and status as *Open* or *Closed*. Only candidate can apply for opened job opening. If the status is closed, it means that job opening will not exists. Also edit the details of job opening from here using Edit button, to make any changes .

To create a new job opening, Click on CREATE NEW. A new screen will appear for enter the details.

- Enter the details of Job and requirements for that job in this screen and Save.
- Add attachments if any, using ATTACHMENTS button.
- It will be added to the list

8.11 RECRUITMENT

Recruitment refers to the overall process of selecting and appointing suitable candidates for jobs within an organization, either permanent or temporary. Selection then consists of the processes involved in choosing from applicants a suitable candidate to fill a post. Before start the recruitment you want to create the selection statuses that you want to enter in recruitment details.

Selection Status

Selection is the process of selecting a qualified person who can successfully do a job and deliver valuable contributions to the organization. A selection system should depend on job analysis. This ensures that the selection criteria are job related and will provide meaningful organizational value.

Creating A Selection Status

From main menu, Navigate to **HR management → Selection Status**, a screen for searching the existing statuses and for creating a new status will get appeared. When click on *Search* button, it list out all the existing status. Also edit the status using *Edit* button, if you want to make any changes.

To create a new status, Click on **CREATE NEW**, and enter the details in the screen .

Fields	Description
Organization	You can choose an organization from the drop down ,on which you want to create a new area of specialization. Or you want to select * organization from drop down, then the field will get listed in all organizations
Name	Enter the name of new Status.
Select as Employee	If put a check on check box, when selecting this status in recruitment management screen, it means that employee is selected.

Click on **Save**.

8.12 Recruitment Management

From main menu navigate to **HR management → Recruitment management**, a screen will appear to search for recruitment details and also add a new one.

When click on *Search* button ,it list out all existing Recruitments for all types of job openings with details. To make any changes for the details, edit using *Edit* button.

Create New Recruitment:

Click on **CREATE NEW** button , a new screen will get appeared to enter the candidate details, interview details and experience details of candidate.

- Enter the details and **Save**.
- It will be added to the recruitment list.

To enter the interview details and experience details:

Click on Interview details, and Experience for experience details a new pop up will generated for both.

- Enter the details and Click on Save. It will be updated.
- Once the candidate get selected as an Employee the Candidate's ID will automatically get updated to Employee ID as next number in the sequence of Employee Management.

8.13 LEAVE REQUEST

Leave is a provision to stay away from work for genuine reasons with prior approval of the authorities. Before an employee can request for a Leave, the following entities must be created in the system:

- Leave Type
- Leave Rule &
- Leave Balance.

Leave Type

There are many types of leave or time off work to which may be entitled. These include public holidays, sick leave, maternity leave, casual leave etc... These types must be added to the system first.

Procedure: Add New Leave Type

To create a new leave type, click on CREATE NEW button, a new screen will open and there can enter the details for a new leave type.

Fields	Description
Leave Code	Code for the new leave type
Employee Category	The employee category to which the leave type is applicable for.
Leave Type	Name for new leave type.
Number of leaves	Maximum number of leaves available in this leave type.
Max Leave Allowed	Number of leaves an employee can apply at a time.
Lapse Cycle	The period by which the number of leaves can be lapsed.
Accrue Cycle	The period by which the number of leaves get accrued.
Eligible for half day	If allowed, this leave type can also be taken as a half day
Is Compensatory	If allowed, this leave type will become a compensatory work request for all categories in an organization. Only one leave type can be set as compensatory for all categories.
Is Remuneratory	When an employee's compensatory work request become approved, a

	leave balance will be added to the leave type which is set as remuneratory. Only one leave type can be set as remuneratory for a Category
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Save the details .

The new leave type will be added to the leave type list. In the main screen of Leave Type, it list out all types of leave already created by using SEARCH button.

To make changes to any of the types, click on the 'EDIT' button, make the changes and click on 'Save'.

Leave Rule

Leaves are governed by a set of rules. The rules are applicable for employee category. When an employee requests a leave, and if it qualifies the rule the request will be saved and forwarded. If the request violates the rule, an error message will be thrown and the request will not get submitted.

To list out the leave rules already created by using **SEARCH** button. A list of rules with details will be generated if any. These rules can be edited from here using **EDIT** button.

Procedure: Add Leave Rule

Click on **ADD LEAVE RULE**, a new pop up screen will appear. There you can enter the details of leave rule for an employee category.

Fields	Description
Rule Description	Name of the description.
Employee Category	The employee category to which the leave type is applicable for.
Config Leave Combination	You can set rule for occurrence of two leave types
Leave Type 1 (click checkbox to indicate 1/2 day)	Select the leave type for the combination.
Combination-Occurrence	Select the occurrence of the combination of leaves, for example after, before, in between, etc..
Leave Type 2 (click checkbox to indicate 1/2 day)	Select the second type of leave in the combination.
Disallow	If you do not want this rule to be applied, click on disallow.

The check box next to the Leave Type 1 & 2 drop down indicates the half day. Checking the same means the rule is applicable for half days of the selected leave type.

- **SAVE** the rule. It will be added to the list with details.

For Example: In your firm the employees are not allowed to take a sick leave after a casual leave. So, the values will be as:

Leave Type 1: Sick Leave.

Combination Occurrence: After

Leave Type 2: Casual Leave

Disallow : (not selected)

Leave Balance

Before requesting a leave, the employees should have their Leave balances updated. Leave balance can be updated by importing a csv file or by clicking on Add Leave Balance.

Procedure: Add Leave Balance

Importing a csv file could be a lot easier if user want to import leave balances for all employees in a department. On bottom left of the page, will find the Leave balance template. Save the details as a csv file and click on the import button. Browse and select the file and OK. A message informing import successfully will pop up.

Updating Leave Balance for a single employee by clicking on ADD LEAVE BALANCE.

- Enter the **Employee Name**.
- The leave types which are entitled to his employee category will be displayed. Select the **leave type** and click to enter the leave balance.
- Enter the Remarks for the leave by click on it.
- Click on **SAVE**

The main page will list out the employee names and their leave details like Leave balance and Leave taken. When you click on **SEARCH** a table will display with the details of all employees of all departments. Instead of this, we can also view the report by department wise or by entering employee name or code.

As leave type is created based on the Employee category. Only employees in those category are permissible to apply for leave.

8.14 Leave Request

Before taking a leave, employees have to submit their leave request.

Leave Request main screen is where the Leaves of employees get listed on submitting a leave. In the main screen we can see some text fields and drop downs like Organization, Employee Name, Leave Request Status & Leave Type which will help to fetch details easily. Clicking on Search button without using any of these fields will display all Leave Requests created from every organization by every employee of all types with all kind of statuses.

This could be configured from the Role Configuration. Select a *Role* which is to be configured. Click on Role Configuration.

In this screen, there are 3 flags,

- **Display All Work Request:** If enabled this feature, the users under this role can view all Leave Requests logged by every employee from every department.
- **Display All Work Request of the Department:** If enabled this feature, the users under this role can view all Leave Requests logged by every employee from every department.
- **Allow Employee Name Suggestion Box:** If enabled this feature, the employee name field will be enabled for users under this role. They can enter any employee name and can log a Leave Request on behalf of that employee. If this feature is disabled, the log in employee's name will be displayed in the Employee name field and, this field will be disabled for entering text.

If the 1st two features are disabled for a role, the users under this role will be able to view the Leave Requests logged by them only.

For Submitting a new Leave Request, one should log in and navigate to HR management. Select Leave Request, a screen with all leave requests submitted by employees with details will be displayed (will work according to the above mentioned configuration made for the user).

Procedure : Submitting A New Request

Click on NEW REQUEST, a screen for entering the details of leave will appear.

- Select the organization and employee name.

*If configured, from the Role Configuration, “**Allow Employee Name Suggestion Box**” checked, the employee name will be displayed in the respective field and the field will be disabled.*

- To know the available leave balance for an employee, click on '**View Current Balance**'. A pop up box with all available Leave Type for that employee and its current balance will appear.
- Select the Leave Type from drop down which that employee's category have, otherwise can't submit the leave.
- Select the Leave session from drop down. Three sessions are available first half, second half and full day.
- Mark the day in the calendar for applying leave.
- If leave is requesting for two sessions at a time, it should be applied separately before submitting.
 - Select the session → first half - select the day - apply
 - Select the session → second half - select the day - apply
 - Select the session → full day - select the day - apply
- The 'number of days' will get automatically updated.
- In the Calendar, the leave marked days will be highlighted in a blue color along with the leave type code and the session chose for the day.
- Enter the Remarks which is mandatory.
- Add attachments if any using ADD ATTACHMENT button.
- Click on SUBMIT LEAVE.

The request will get logged in the list. The status of the request will be in Awaiting Approval if have configured an Approval Chain for the document type HR Leave.

- Once we logged a request, the Approver will get a notification and a mail will send to his/her email address.

- Approver can approve, reject or forward the document.
- After the document get approved, the status of the leave request will change to 'Approved'.
- Once the approval get completed the number of leaves will get deducted from the leave balance .

8.15 Employee Leave Report

From main menu, Navigate to **HR Management** → **Misc Reports**

- Select '**Employee Leave Report**' from the reports drop down.
- Clicking on Search button will display the Leave report according to the selection made.
- Clicking on the number of Leave Taken by an employee will direct to that employee's Leave taken details. The tabular will contain Leave type, Number of Leaves, Date From & Date To. These details can be exported to .csv .rtf and .pdf formats .

8.16 TERMINATION

Termination of employment is an employee's departure from a job.

Termination may be voluntary on the employee's part, or it may be at the hands of the employer, often in the form of dismissal (firing) or a layoff.

In Posibolt ,Termination Request is the screen where an employee applies for resignation. The employee can apply a termination request on the basis of a Request category which consist of a no.of Request Types.

8.17 Request Type

Request Type is the screen where to create types of termination request for employees.

In posibolt , for Request type navigate to HR Management → Request Type.

Here search for existing request types using SEARCH button, Also search a specific request types using particular organization or using the request type drop down. Then only corresponding request type will be listed . To make any changes for existing request type, edit them using EDIT button To create a new request type, Click on CREATE NEW button, will be directed to a screen for entering the details.

Fields	Description
Name	Enter the name of Request Type
Description	Enter the description for Request type.
Responsible User	Enter the name/Id of Responsible user(For eg. Head of the department or any Responsible person). When an employee is applying for this termination request type, then the responsible user will get notification about the request. Then the user can complete the request with corresponding status and comments.
Organization	The Users dealing with Request types may differ from organization to organization. If the Responsible User of a request type is same for all organization then you may choose *
Status Category	Status category allows user to define the status and corresponding transitions rules.

Save using **SAVE** button. It will be added to the list.

8.18 Request Category

From here, categorize the Request Types to a Request Category. From main menu , navigate to HR Management → Request Category.

Here lists all the existing categories with description. To make any changes, edit using EDIT button, To create a new Request category, click on ADD REQUEST CATEGORY. It will get a new screen for entering the details with a list of all existing request types.

Fields	Description
Request Category Name	Enter the name
Description	Enter the description

Then select the request types from the list which want to come under this request category.

When an employee is choosing this request category in termination request then all responsible users of request types under this category will get notifications for approval.

- Save using **SAVE** button. It will be added to the Request Category list.

8.19 Termination Request

At the time of terminating, there will be lots of procedures to be undertaken. There might be some dues like payments or receipts or Documents to be hand over to the employee.

When an employee adds a request in termination request screen the responsible users will get notified about it. This will help the users to act accordingly.

From main menu ,navigate to **HR Management →Termination Request**.

Search termination request using SEARCH button. For getting specific termination request, filter it using Request category, Employee name or status. Then the corresponding termination request will be listed.

- Clicking on VIEW DETAILS shows the details about the approver name, Status, Result and Comments by the approver of a termination request
- For a new request, Click on CREATE NEW. It will be directed to a screen for entering the details.
- Save using SAVE Button. Once an employee save the request , it will be listed with status DRAFTED and also notification will send to the responsible users.
- When the users login with his credentials, they got the notification of termination request. Clicking on it got a screen for completing the request.
- Users can select the result from drop down and enter comments in the respective field. Click on **SAVE** button .It will complete the termination request.

*If the chosen Request category has more than one request type, then the status of the request will be as **drafted** until all responsible users complete the request.*

8.20 Configuration Settings

Fields	Description
Allow To Apply Leave For Other Users	The user can apply leave for other users or employees
Allow Locking of Shifts *	The shifts are locked to prevent editing of the same.
Allow Employee Name Suggestion Box	The employee name will be displayed in the respective field and the field will be disabled.