Leave Tool Manual

WorkDo Tool Guide

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I. Tools (in Do page)

WorkDo has many tools in Do page of different levels within a workplace. This means workplace, groups and buddies all have a specific Do button and set of tools to use. Below is the table (Table I-1) to show which tools are available at which level.

Tools such as Leave, Leave Pro, Attendance, Expenses and Approvals are depended on the HR tool. The HR tool is set as activated once you created a workplace while other tools such as Leave Pro and Attendance (depend on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1 WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Expenses	●	x	x	HR
Attendance	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	
CRM	●	x	x	
Phonebook	●	●	●	
Cashbook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

II. Leave

One of the best things about WorkDo is that tools have default settings that may match your company policy. You can also adjust these settings according to your needs. Many of the advanced tools are depended on the HR tool. Hence once you have completed settings such as departments, work hours and employee profiles in the HR tool, the settings for other tools are easy.

Leave is a simple leave management tool that allows employees to apply leave requests and check leave records while managers can approve leave requests and track the team’s leave status. The request approval process is connected to the HR tool (see Table II-1), please set up the HR tool using **HR Tool Guide** first.

Leave settings are easy, you just need to set leave unit (hourly, half day or whole day) and edit activated leave types.

▼ Table II-1. Leave-HR Dependencies

HR Settings	Leave Pro	Leave	Attendance	Expenses	Approvals
Departments	●	●	●	●	●
Work Days	●	x	●	x	x
Work Hours	●	x	●	x	x
Employment Types	●	x	x	x	x
Deputy	●	●	x	x	x
Approver	x	x	x	●	●
Employee Profiles	●	●	●	●	●
Company Calendar	●	x	●	x	x

Please note WorkDo also provides the advanced version of Leave, Leave Pro. For difference between the two tools, please see Table II-2 below. Leave Pro has functions such as flexible leave types (annual leave with carryover settings and bereavement leave that is manually granted), employee leave balance calculations and more.

▼ Table II-2. Leave VS. Leave Pro

Function	Authority	Leave	Leave Pro
My leave records	All[1]	●	●
View overview	All	●	●
Auto exclude non-working days	All	x	●
View my leave balance	All[2]	x	●
View leave type remark	All	x	●
Deputy assignment dependency (in HR)	Manager/HR Staff	●	●
Multiple levels of approval	Manager	●	●
Dotted-line manager approval	Manager	●	●
Export leave stats	Manager	x	●
Configure leave types	HR Staff	●	●

[1]Depend on the role of the tool. In Leave Pro, employees can see own records, manager can see own and department leave records while HR Staff can see all records. In Leave, only employees and HR Staff can see records.
[2]Depend on the role of the tool. Employees can see own balance, manager can see own and department balances while HR Staff can see all balances.

Function	Authority	Leave	Leave Pro
Adjust leave duration of leave request	HR Staff	●	x [3]
Export annual leave stats	HR Staff	●	●
Set leave unit (half hour, hour, half day, whole day)	HR Staff	●[4]	●
Manually give grant and adjust leave balance	HR Staff	x	●
Configure leave type based on gender, employment type and department	HR Staff	x	●
Configure auto grant: monthly, yearly and years of service	HR Staff	x	●
Set carryover rules	HR Staff	x	●
Configure leave time limit	HR Staff	x	●
Apply leave on behalf of employee	HR Staff	x	●
Absence records and set notifications	HR Staff	x	●
Export leave balance stats	HR Staff	x	●

III. Setting Up

The names of the settings are the same in mobile and web interface, this document focuses on web interface settings.

The process includes three stages: activate tool, HR settings and Leave settings as

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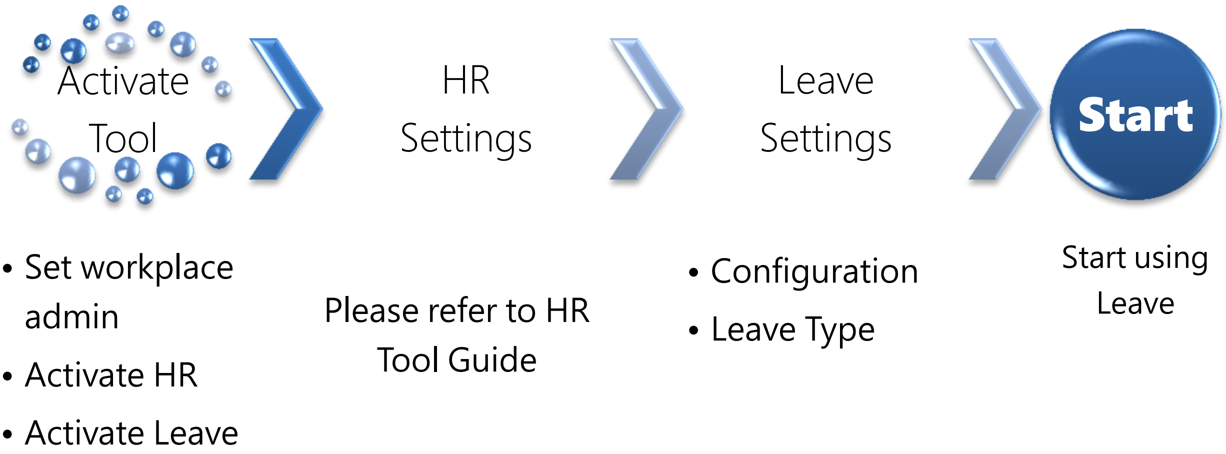
[3]With Leave, the leave request duration can be adjusted while in Leave Pro, only balance can be adjusted.
[4]The smallest unit in settings for Leave is hourly but it supports half-hour unit.

shown below. The request approval process and deputies depend the HR tool hence please see **HR Tool Guide** for HR tool settings.



▲ Image III-1. Setup Process

Each step of setting up requires you to prepare different data. Please follow Table III-1 to prepare these data before setting up Leave.

▼ Table III-1. Required Data

Process	Required Data	Note
Activate Tool	✓ Activate HR ✓ Choose tool admin	✓ Done by workplace admins [5]
Leave Setup	✓ Configuration ✓ Activated leave type names	✓ Done by HR Staff of Leave tool

[5] For workplace admin authorities please see Step 1 (P. 6)

STEP 1． Activate Tool

To ensure divided information among all members in the workplace, WorkDo was designed to have workplace admins and tool admins. (Table Step 1-1)
Workplace admins include an owner and multiple admins that can adjust workplace settings. Normally the workplace admins are management or IT employees. Tool admins[6]control the data others see per tool. Different tools can have different members as tool admin. Activating tools is done by workplace admin.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/assign workplace admins

Once you enter the workplace you can check if you are the workplace admin and if you are, you can go straight to step b to activate tools. If you are not, please ask workplace admins to activate tools using step b.

From Table Step 1-1, workplace admins are assigned by the owner or other admins.

[6]For tool admin authorities please see Step 1-b (P. 7)

If you need to be a workplace admin, please ask one of the admins to assign you.

Manage Workplace Admin

1. Ask workplace admins to go to Workplace page
2. Click Workplace Settings below the workplace name
3. Click Manage Admin, red crown means owner and blue crown means admin
4. Click Add Admin
5. Choose member(s)
6. Click Done and wait for success message
7. Ask the new admin to refresh the page to see admin-only menus

b. Set up tool roles

WorkDo has many tools that require different members within the workplace to take on roles of admins or HR staff to control information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

In Leave, there are three roles: No Role, Employee and HR Staff. Once Leave is activated, the new members will automatically have the Employee role. As mentioned above, Leave is depended on HR hence please activate HR first. Once you enter Tool Box and click Manage button of Leave, please use the steps below to manage tool roles.

Manage Tool Roles

1. Ask workplace admins to go to Workplace page
2. Click globe icon on top left to show menus
3. Click Workplace Settings
4. Click Tool Box, the default is Activated tab for you to activate, deactivate and manage tools. If Leave is not in this tab, go to Advanced tab and activate it.
5. Find Leave in Activated tab then click Manage
6. Click Manage All Member Roles
7. Enter member display name in search to quickly locate member
8. Click the drop down menu and choose the role, repeat until all roles have been assigned correctly

STEP 2． Set Up Leave

According to Table Step 1-1 Admin Authorities, only HR Staff of Leave tool can change Leave settings, please check your role before changing settings.

Leave allows employees to apply leave and check records while managers can approve requests and track the team’s leave status. The request process is linked to the HR tool (see Table II-1), please set up the HR tool using **HR Tool Guide** first.

Leave settings are easy, you just need to set leave unit (hourly, half day or whole day) and edit activated leave types.

a. Configuration

Set up basic leave unit of hourly basis, half day or whole day. If you choose hourly basis, the tool also supports half-hour unit.

Configuration

1. Ask HR Staff of Leave to go to Workplace page
2. Click Do > Leave
3. Left side menu Management > Configuration
4. Click Edit
5. Click Leave Unit and choose from drop down menu
6. Click Done and wait for success message

b. Leave Type

You can edit existing leave types by changing the name or deactivate it. You can check the edit log to keep track.

Leave Type

1. Ask HR Staff of Leave to go to Workplace > Do > Leave
2. Left side menu Management > Leave Type
3. Click the green pencil button on the left of the leave type to edit or simply click the leave type and click edit
4. Enter the correct leave type name and check leave type status, Active means employees can apply this leave type, Inactive means it will not be an option for employees
5. Click Save and wait for success message

Congratulations! All settings are done!

Let's start inviting members and start using Leave!

Please contact us with any questions you may have!