

**Home**

# Leave Requisition Process

## User Manual



<b>Customer:</b>	[Company]
<b>Title:</b>	Leave Requisition Process
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<b>Updated by:</b>	Su-Anne de Jong
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<b>Date Required:</b>	30 June 2019

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## Table of Approval/Acceptance

Responsibility	Designation	Name	Signature	Date
Compiled by	Consultant			
Checked by	Developer			
Process Checked	Process User			
Process Sign-off	Process Owner			
Project Sign-off	Customer Project Manager			
Financial Sign-off	Financial			

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## Assignment Information

Responsibility	Designation	Name	Contact Information
Functional Owner			
Technical Owner			
Data Owner			
Key Contact			

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## Revision History

Revision	Approved	Approval Date	Description
Draft			Draft for Review
1.0			
2.0			

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## Development Status

	Functional Specifications	Technical Specifications	Program/Process Development	Testing Requirements
Status				
Approved by				
Date				

# 1. Introduction

## **1.1. Purpose of this Document**

The purpose of this document is to outline the training guide for the Leave Requisition Process for [Company].

## **1.2. Scope of this Document**

The scope of this document is limited to the Leave Requisition Process test plan as was discussed with [Company] and is not intended to support any other functions that [Company] may have.

## 2. Processes from User's Perspective

## 2.1. Signing On

The sign on screen (Image 1) will allow all users who have access to the [Company] system to sign on by entering a username and password.



Image 1 – Log on Screen

The steps to log on are as follows: Type in your “Username”

- Type in your “Password”
- Click the “Sign In” button

Once you have successfully signed on, the [Company] main screen will be displayed (Image 2).



Image 2 – Main Screen

### **3. Leave Requisition Process**

This section will describe the Leave Requisition process and all the steps taken until the employee's leave has been approved by the company. Both scenarios will be shown to provide the users with an overview of the different steps to apply for leave.

### **3.1. Scenario 1**

This section describes how a user will apply for leave for themselves and HR will approve it and then update the system.

### 3.1.1. Fill in a Leave Form

This section describes how a user captures their leave on the system.

**Roles:** Everyone

Any registered employee will log onto the [Company] FlowCentric website and navigate to the *Start A Process >> Human Resources >> Leave Requisition >> Fill in a Leave Form* menu option and the form will be shown to the employee, as seen in Image 3.

Image 3 – Fill in a Leave Form

The employee will select an option from the “Leave Type” dropdown list. The different options are:

- Annual
- Family Responsibility / Compassionate
- Maternity
- Sick
- Study
- Unpaid (Time Off Without Pay)
- Other

The below objects will be *hidden/visible* depending on the “Leave Type” selection made:

Leave Type Note (Visible)	Leave Type Note (Invisible)	Leave Days Available (Visible)	Leave Days Available (Invisible)	Attach Medical Certificate (Visible)	Attach Medical Certificate (Invisible)

Maternity	# Annual # Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other	Annual	# Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other	Sick	# Annual # Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other
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The 'Leave Type Note' will use the following wording:

*For Paternity Leave please submit a request for Family Responsibility Leave, Maternity Leave is only available to female employees*

The "Leave Days Available" Reference Label control will update automatically with the number of days remaining for the employee for that type of leave.

The employee must then select the dates by either typing the dates in the text boxes or selecting from the calendar control that appears. The "Days Applied For" Textbox control will automatically update with the number of days. However, this can be changed if not calculated correctly.

If you are taking a "Half Day" on either of the dates you have selected, then click on the checkbox control next to the date for which you are taking a half day.

Any comments the user wishes to enter can be made or not and the activity is submitted, the next activity triggered is **Approve Leave**.

### 3.1.2. Approve Leave

This section describes how the manager who the employee reports to is informed of the leave requested.

**Roles:** Report To / Manager

The manager that the employee reports to will log onto the [Company] FlowCentric website and navigate to the *Pending >> Approve Leave* menu option and the form will be shown to the manager, as seen in Image 4.

HOME > PENDING TASKS > APPROVE ANNUAL LEAVE REQUESTED BY SITE ADMINISTRATOR RETURN TO PENDING TASKS

#10229

## Approve annual leave requested by Site Administrator

RECEIVED FROM: SITE ADMINISTRATOR ON: 20 JUNE 2018 AT 14:38:55  
 PROCESS ID: 10092 PROCESS: LEAVE REQUISITION GROUP: HUMAN RESOURCES

SHOW BRANCH HISTORY [SHOW PROCESS NOTES](#)

NAME	DATE
Site Administrator	2018/06/20

---

LEAVE DETAILS

FOR	EMPLOYEE NUMBER
Site Administrator	SYSTEM

---

<b>LEAVE TYPE</b> Annual	
<b>FROM</b> 2018/06/28	<b>HALF DAY?</b> No
<b>TO</b> 2018/06/28	<b>HALF DAY?</b> No
<b>DAYS APPLIED FOR</b> <input type="text" value="1"/>	<b>LEAVE DAYS AVAILABLE</b> -5.00

**COMMENTS FROM REQUESTOR**  
Family Holiday

---

APPROVAL DETAILS

**APPROVAL \***

**COMMENTS**

Image 4 – Approve Leave

With reference to the table in 3.1.1 above, display the visible objects per *Leave Type*.

The manager will receive the Approve Leave notification and must check the information and if the “Days Applied For” is incorrect this can be changed. Once verified the manager must select an option from the “Approval” dropdown list, the options are:

- Approve
- Decline

If “Decline” is selected then “Comments” becomes a required field, otherwise you do not need to enter any comments. Once all the details have been filled in, click the “Approval Complete” button.

If the leave request is declined, then a notification is sent to the originator to advise the employee that the leave was declined which must be acknowledged, as seen in Image 5.

HOME > PENDING TASKS > YOUR 1 DAY(S) FAMILY RESPONSIBILITY / COMPASSIONATE LEAVE WAS DECLINED.

[RETURN TO PENDING TASKS](#)

#10232

## Your 1 day(s) family responsibility / compassionate leave was declined.

RECEIVED FROM: SITE ADMINISTRATOR ON: 20 JUNE 2018 AT: 15:55:50

PROCESS ID: 10093 PROCESS: LEAVE REQUISITION GROUP: HUMAN RESOURCES

[SHOW BRANCH HISTORY](#) [SHOW PROCESS NOTES 0](#)

NAME	DATE
Site Administrator	2018/06/20

The 1 day(s) family responsibility / compassionate leave requested by avar1 was declined.

[ACKNOWLEDGE](#) [RESET](#)

Image 5 – Notification (Leave Declined)

If the leave is approved, then the **Update HR System** activity is triggered.

### 3.1.3. Update HR System

This section describes how HR authorizes the update of the HR system for the leave requested.

**Roles:** HR Department

The HR Clerk will log onto the [Company] FlowCentric website and navigate to the *Pending Tasks >> Update HR System* menu option and the form will be shown to the user, as seen in Image 6.

HOME > PENDING TASKS > UPDATE HR SYSTEM FOR 3 DAY(S) - ANNUAL LEAVE FOR - SITE ADMINISTRATOR FROM 2018/06/26 RETURN TO PENDING TASKS

#10235

## Update HR System for 3 day(s) - annual leave for - Site Administrator from 2018/06/26

RECEIVED FROM: SITE ADMINISTRATOR ON: 20 JUNE 2018 AT: 16:04:38  
 PROCESS ID: 10094 PROCESS: LEAVE REQUISITION GROUP: HUMAN RESOURCES

SHOW BRANCH HISTORY  SHOW PROCESS NOTES

DATE	
2018/06/20	

---

LEAVE DETAILS

<b>EMPLOYEE REQUESTING LEAVE</b> Site Administrator	<b>EMPLOYEE NUMBER</b> SYSTEM
<b>LEAVE TYPE</b> Annual	
<b>FROM</b> 2018/06/26	<b>HALF DAY?</b> No
<b>TO</b> 2018/06/28	<b>HALF DAY?</b> No
<b>DAYS APPLIED FOR</b> 3	<b>LEAVE DAYS AVAILABLE</b> -6.00
<b>EMPLOYEE'S COMMENTS</b> Annual family vacation.	

---

APPROVAL DETAILS

<b>APPROVER NAME</b> Site Administrator
<b>APPROVER COMMENTS</b>

UPDATE HR SYSTEM
RESET

Image 6 – Update HR System

The HR Clerk would use this activity to complete the application and all that is required is to click the “Update HR System” button, and the process will be archived.

## **3.2. Scenario 2**

This section describes how a user will apply for leave on behalf of someone else and HR will approve it and then update the system.

### 3.2.1. Fill in Leave on Behalf of Somebody Else

This section describes how a user captures someone else's leave on the system.

**Roles:** Everyone

Any registered employee will log onto the [Company] FlowCentric website and navigate to the *Start A Process >> Human Resources >> Leave Requisition >> Fill in Leave on Behalf of Someone Else* menu option.

HOME > START A PROCESS > FILL IN LEAVE ON BEHALF OF SOMEBODY ELSE START A NEW PROCESS ?

#256

## Fill In Leave On Behalf Of Somebody Else

PROCESS LEAVE REQUISITION GROUP HUMAN RESOURCES

NAME Site Administrator	DATE 2018/06/21
REQUEST LEAVE FOR Shané van der Berg [hq\shanevdb]	EMPLOYEE NUMBER FC5012
LEAVE TYPE * Annual	
FROM (YYYY/MM/DD) * 2018/06/21	HALF DAY? <input type="checkbox"/>
TO (YYYY/MM/DD) * 2018/06/21	
DAYS APPLIED FOR 1	LEAVE DAYS AVAILABLE -3.25
COMMENTS	
<input type="text"/>	
<input type="button" value="SUBMIT FOR APPROVAL"/> <input type="button" value="RESET"/>	

Image 7 – Fill in Leave on Behalf of Somebody Else

Select the name of the employee you wish to apply for leave from the “Request Leave For” dropdown list. This is configured in the Processware tool using the user’s metadata and not the web navigator. Once a name has been selected the rest of the page will load as seen above in Image 7.

The employee will select an option from the “Leave Type” dropdown list. The different options are:

- Annual
- Family Responsibility / Compassionate
- Maternity
- Sick
- Study
- Unpaid (Time Off Without Pay)
- Other

The below objects will be *hidden/visible* depending on the “Leave Type” selection made:

Leave Type Note (Visible)	Leave Type Note (Invisible)	Leave Days Available (Visible)	Leave Days Available (Invisible)	Attach Medical Certificate (Visible)	Attach Medical Certificate (Invisible)
Maternity	# Annual # Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other	Annual	# Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other	Sick	# Annual # Family Responsibility / Compassionate # Maternity # Sick # Study # Unpaid (Time Off Without Pay) # Other

The “Leave Days Available” Reference Label control will update automatically with the number of days remaining for the employee for that type of leave.

The employee must then select the dates by either typing the dates in the text boxes or selecting from the calendar control that appears. The “Days Applied For” Textbox control will automatically update with the number of days. However, this can be changed if not calculated correctly.

If you are taking a “Half Day” on either of the dates you have selected, then click on the checkbox control next to the date for which you are taking a half day.

Any comments the user wishes to enter can be made or not and the activity is submitted, the next activity triggered is **Approve Leave**.

### 3.2.2. Approve Leave

This section describes how the manager of the employee the leave was requested for is informed of the leave requested.

**Roles:** Report To / Manager

The manager will log onto the [Company] FlowCentric website and navigate to the *Pending >> Approve Leave* menu option and the form will be shown to the employee, as seen in Image 8.

**Approve annual leave requested by Site Administrator**

RECEIVED FROM: SITE ADMINISTRATOR ON: 18 JUNE 2018 AT 14:38:11  
 PROCESS ID: 10062 PROCESS: LEAVE REQUISITION GROUP: HUMAN RESOURCES

SHOW BRANCH HISTORY  SHOW PROCESS NOTES

NAME	DATE
Site Administrator	2018/06/18

LEAVE DETAILS

FOR	EMPLOYEE NUMBER
Site Administrator	SYSTEM

LEAVE TYPE  
Annual

FROM	TO	HALF DAY?
2018/06/18	2018/06/18	No
		No

DAYS APPLIED FOR:

LEAVE DAYS AVAILABLE: -2.00

COMMENTS FROM REQUESTOR: ofdg

APPROVAL DETAILS

APPROVAL \*

COMMENTS

APPROVAL COMPLETE RESET

Image 8 – Approve Leave

With reference to the table in 3.2.1 above, display the visible objects per *Leave Type*.

The manager will receive the Approve Leave notification and must check the information and if the “Days Applied For” is incorrect this can be changed. Once verified the manager must select an option from the “Approval” dropdown list, the options are:

- Approve
- Decline

If “Decline” is selected then “Comments” becomes a required field, otherwise you do not need to enter any comments. Once all the details have been filled in, click the “Approval Complete” button.

If the leave request is declined, then a notification is sent to the originator to advise the employee that the leave was declined which must be acknowledged, as seen in Image 9.

HOME > PENDING TASKS > YOUR 1 DAY(S) FAMILY RESPONSIBILITY / COMPASSIONATE LEAVE WAS DECLINED. RETURN TO PENDING TASKS

#10232

## Your 1 day(s) family responsibility / compassionate leave was declined.

RECEIVED FROM SITE ADMINISTRATOR ON 20 JUNE 2018 AT 15:55:50  
 PROCESS ID 10093 PROCESS LEAVE REQUISITION GROUP HUMAN RESOURCES

SHOW BRANCH HISTORY [🔗](#) SHOW PROCESS NOTES [0](#) [🔗](#)

NAME	DATE
Site Administrator	2018/06/20

The 1 day(s) family responsibility / compassionate leave requested by avar1 was declined.

[ACKNOWLEDGE](#) [RESET](#)

Image 9 – Notification (Leave Declined)

If the leave is approved, then the **Update HR System** activity is triggered.

### 3.2.3. Update HR System

This section describes how HR authorizes the update of the HR system for the leave requested.

**Roles:** HR Department

The HR Clerk will log onto the [Company] FlowCentric website and navigate to the *Pending Tasks >> Update HR System* menu option and the form will be shown to the employee, as seen in Image 10.

HOME > PENDING TASKS > UPDATE HR SYSTEM FOR 3 DAY(S) - ANNUAL LEAVE FOR - SITE ADMINISTRATOR FROM 2018/06/26 RETURN TO PENDING TASKS

#10235

## Update HR System for 3 day(s) - annual leave for - Site Administrator from 2018/06/26

RECEIVED FROM: SITE ADMINISTRATOR ON: 20 JUNE 2018 AT: 16:04:38  
 PROCESS ID: 10094 PROCESS: LEAVE REQUISITION GROUP: HUMAN RESOURCES

SHOW BRANCH HISTORY  SHOW PROCESS NOTES

DATE	
2018/06/20	

---

LEAVE DETAILS

<b>EMPLOYEE REQUESTING LEAVE</b> Site Administrator	<b>EMPLOYEE NUMBER</b> SYSTEM
<b>LEAVE TYPE</b> Annual	
<b>FROM</b> 2018/06/26	<b>HALF DAY?</b> No
<b>TO</b> 2018/06/28	<b>HALF DAY?</b> No
<b>DAYS APPLIED FOR</b> 3	<b>LEAVE DAYS AVAILABLE</b> -6.00
<b>EMPLOYEE'S COMMENTS</b> Annual family vacation.	

---

APPROVAL DETAILS

<b>APPROVER NAME</b> Site Administrator
<b>APPROVER COMMENTS</b>

Image 10 – Update HR System

The HR Clerk would use this activity to complete the application and all that is required is to click the “Update HR System” button, and the process will be archived.

## ***4. How Can We Help?***

We would love to assist you! If you'd like to discuss your current needs, have questions, or discuss your roadmap with our team, then feel free to book a 30 minute call with Daniel Hauptfleisch via our [Contact Us](#) page.

## 5. Downloadable PDF Document

Here you will find the download link to the full PDF version of this online Manual.

[Click here](#) to open and download / save.