Approval Hub (HR & Ops Suite)

Time Off End-User & Configuration Guide

Version 2.0.3

1. Introduction to Approval Hub (HR & Ops Suite)..... 3
2. End-User Guide: Step-by-Step..... 4
2.1. Dashboard Overview..... 4
2.2. Calendar..... 5
2.3. Creating and Submitting a Time Off Request..... 6
2.4. My Balance..... 8
2.5. My Reports..... 10
3. Configurations..... 11
3.1 Time Off Setting..... 11
3.2. Leave Type Configuration..... 12
3.3 Location..... 13
3.4 Working Time..... 14
3.5 Public Holiday..... 16
3.6 Balance Management..... 16
3.6.1 Update the balance manually..... 17
3.6.2 Update the balance by Excel file..... 18
3.6.3 Default the balance..... 19
3.6.4 Carry forward leave days/hours into the next year..... 20
3.7 Increase the number of hours/days allocated by Month..... 20
3.8. User Settings..... 22
Configuration Fields..... 22
4. Additional Resources..... 23

1. Introduction to Approval Hub (HR & Ops Suite)

Approval Hub (HR & Ops Suite) is a comprehensive organizational platform designed to centralize and streamline administrative, operational, and HR processes. By consolidating various business functions into a single interface, it enhances productivity, improves approval transparency, and standardizes data management across the organization.

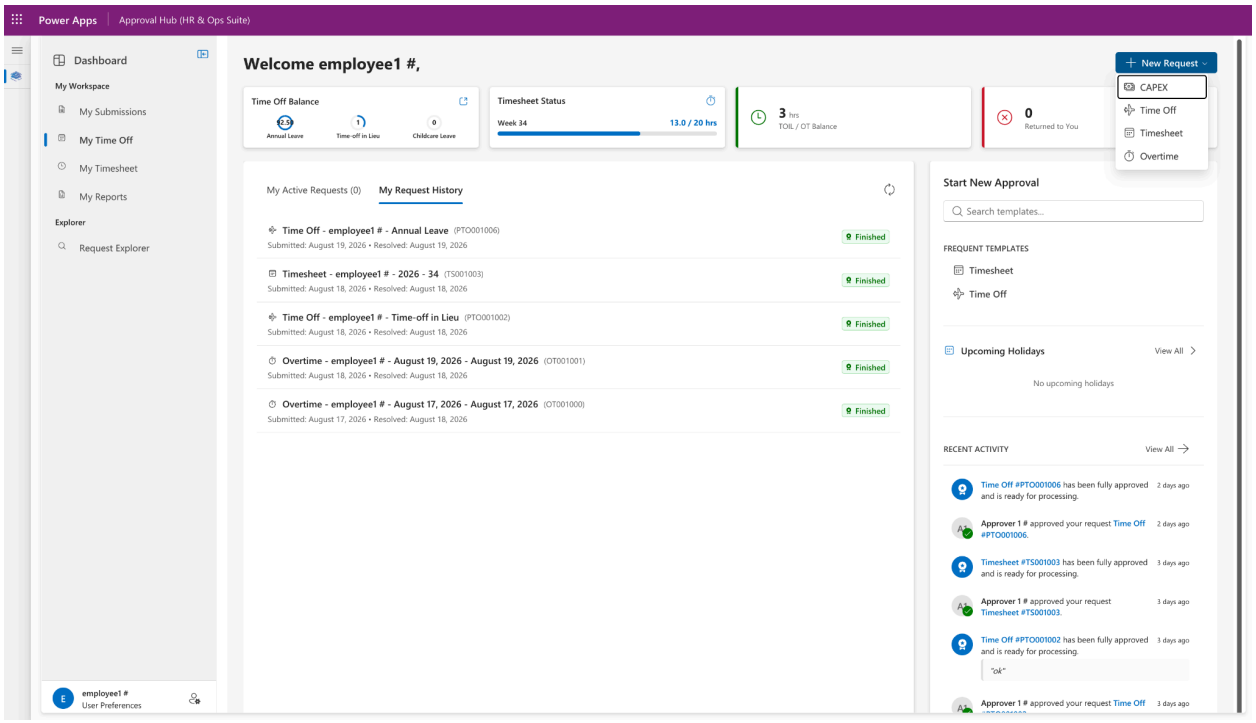
The Time Off application is a specialized module integrated within the Approval Hub ecosystem, purpose-built to automate and simplify leave management. It eliminates manual tracking inefficiencies by providing a seamless, digital workflow for both employees and administrators.

Key capabilities of the Time Off application include:

- **Centralized Request Management:** Easily initiate, track, and manage leave requests (such as Annual Leave, Sick Leave, or Time-off in Lieu) through a unified dashboard.
- **Real-time Balance Visibility:** Instant access to accurate leave balances, allowing employees to make informed decisions before submitting requests.
- **Automated Workflow Processing:** Streamlined approval chains that automatically route requests to relevant stakeholders—such as Line Managers and HR departments—ensuring accountability and speed.
- **Advanced Analytics & Reporting:** Comprehensive reporting tools that provide detailed insights into individual and team leave patterns, monthly summaries, and yearly breakdowns.
- **Flexible Administration:** Robust configuration options for administrators, including custom working time schedules, public holiday management, carry-forward rules, and automated balance accrual settings.

2. End-User Guide: Step-by-Step

2.1. Dashboard Overview

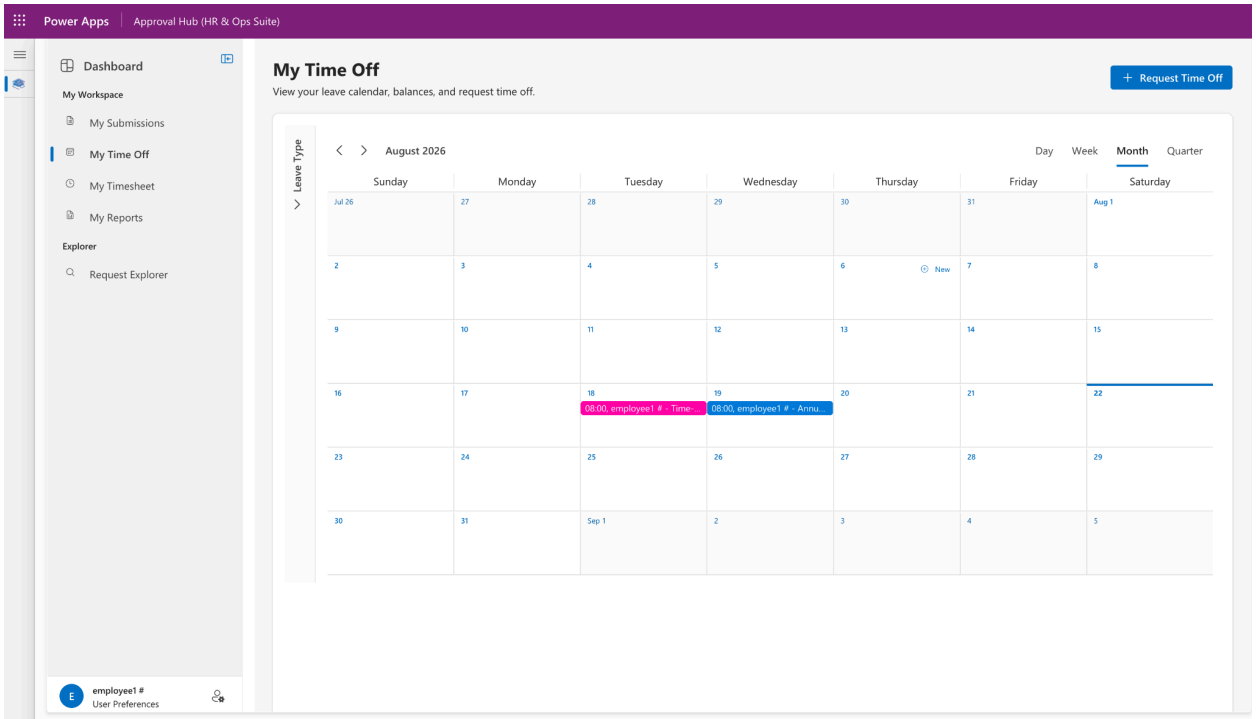


The Dashboard serves as the central hub for your workspace, providing a consolidated view of your requests, balances, and system activity.

- **Sidebar Navigation:** Use the left navigation menu to manage your workspace and explore system records:
    - **My Workspace:** Access specific modules including 'My Submissions', 'My Time Off', 'My Timesheet', and 'My Reports'.
    - **Explorer:** Use the 'Request Explorer' to search and view all relevant requests.
- **Main Dashboard View:**
    - **Personalized Header:** Displays a welcome message identifying the current user.
    - **Top Metric Cards:** Monitor key data at a glance, including:
        - **Time Off Balance:** Visual summary of your remaining leave across various categories (e.g., Annual Leave, Time-off in Lieu, Childcare Leave).
        - **Timesheet Status:** Tracking your logged hours against targets (e.g., Week 34 progress).

        - **TOIL / OT Balance:** Overview of your accrued Time-off in Lieu or Overtime balance.
        - **Returned to You:** Quick notification of any requests returned for revisions.
    - **Request Tabs:** Toggle between 'My Active Requests' for ongoing submissions and 'My Request History' for a record of past submissions and their statuses.
- **Right Sidebar Panels:**
    - **New Request:** Click this button to open a dropdown menu and initiate new approvals for CAPEX, Time Off, Timesheet, or Overtime.
    - **Start New Approval:** Use the search field to quickly find specific request templates.
    - **Frequent Templates:** Quick access links to commonly used forms, such as 'Timesheet' and 'Time Off'.
    - **Upcoming Holidays:** A dedicated section to view upcoming public holidays and their dates.
    - **Recent Activity:** A chronological feed providing updates on your recent request activity, such as approval status changes.

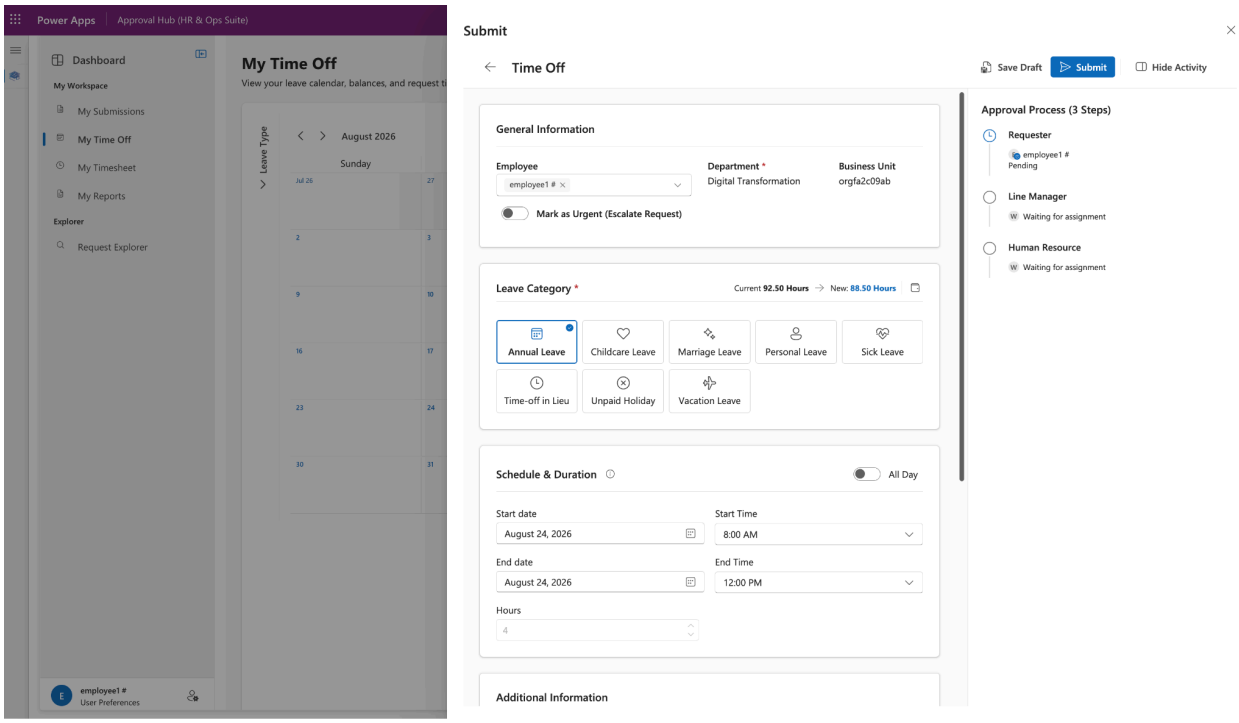
2.2. Calendar



The 'My Time Off' calendar provides a centralized visual interface to manage your leave schedule and track upcoming time off requests.

- **Navigation & Views:**
    - Use the arrow icons (< / >) to navigate between months.
    - Select your preferred view mode using the toggle buttons (Day, Week, Month, Quarter) in the top right corner to adjust the time range displayed.
- **Leave Visualization:** The calendar grid displays approved or pending leave requests, color-coded for quick identification.
- **Request Management:**
    - **Request Time Off:** Click this button in the top-right corner to initiate a new leave request.
    - **Leave Type Filter:** Use the 'Leave Type' dropdown on the left side of the calendar to filter the displayed leave requests by category (e.g., Annual Leave, Sick Leave).

2.3. Creating and Submitting a Time Off Request

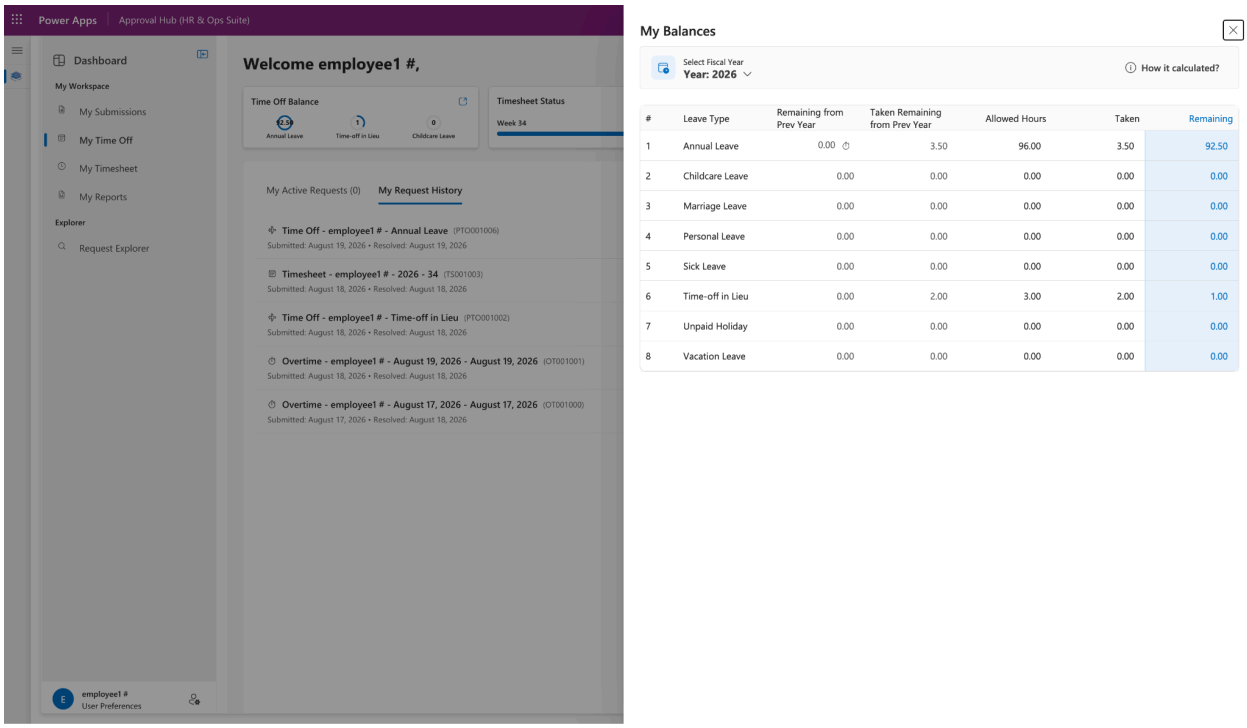


Follow these steps to initiate and submit a new time off request:

1. **Initiate Request:** Click the '**Request Time Off**' button located on the top-right of the 'My Time Off' calendar or select '**Time Off**' from the '**New Request**' dropdown menu on the Dashboard.

2. **General Information:** Verify your pre-filled details, including Employee, Department, and Business Unit. Use the '**Mark as Urgent**' toggle if your request requires prioritized processing.
3. **Leave Category:** Click to select the appropriate leave type (e.g., Annual Leave, Sick Leave, Vacation Leave). The system will dynamically update your leave balance display, showing your 'Current' vs. 'New' remaining hours/days.
4. **Schedule & Duration:** Configure the timing of your leave:
    a. Use the date pickers to select the **Start date** and **End date**.
    b. Use the '**All Day**' toggle if the leave spans the entire workday, or input specific **Start Time** and **End Time** for partial day requests.
    c. The system will automatically populate the '**Hours**' field based on your selection.
5. **Additional Information:** Provide any necessary context or notes regarding your absence in the dedicated field.
6. **Review Approval Process:** On the right-hand panel, view the mandatory approval workflow, which details the specific Line Manager and HR stakeholders who will review your submission.
7. **Finalize:**
    a. Click '**Save Draft**' if you wish to finish the request later.
    b. Click '**Submit**' to send your request through the defined approval chain.
    c. You can toggle the '**Hide/Show Activity**' button to manage your view of the submission progress.

2.4. My Balance



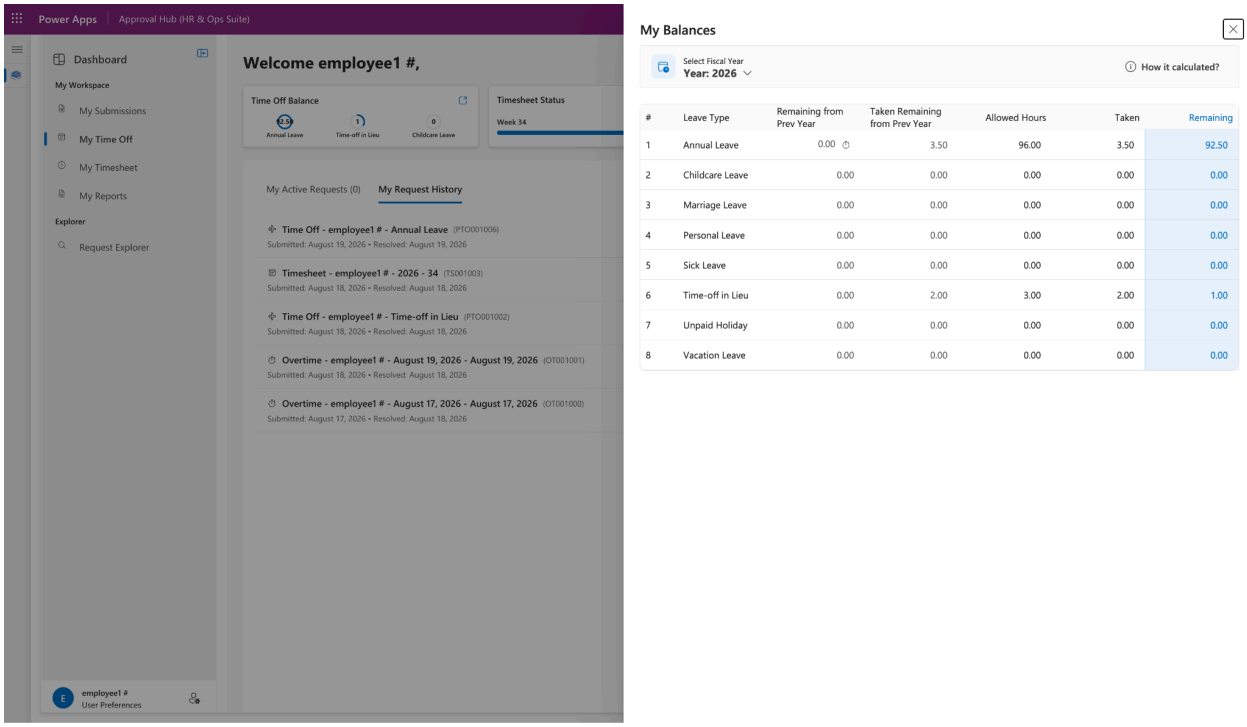
The 'My Balances' window provides a detailed overview of your accrued leave, helping you keep track of your entitlements and usage throughout the fiscal year.

To review your leave balances, navigate to your workspace or dashboard and access the balance summary section.

Key Features & Information:

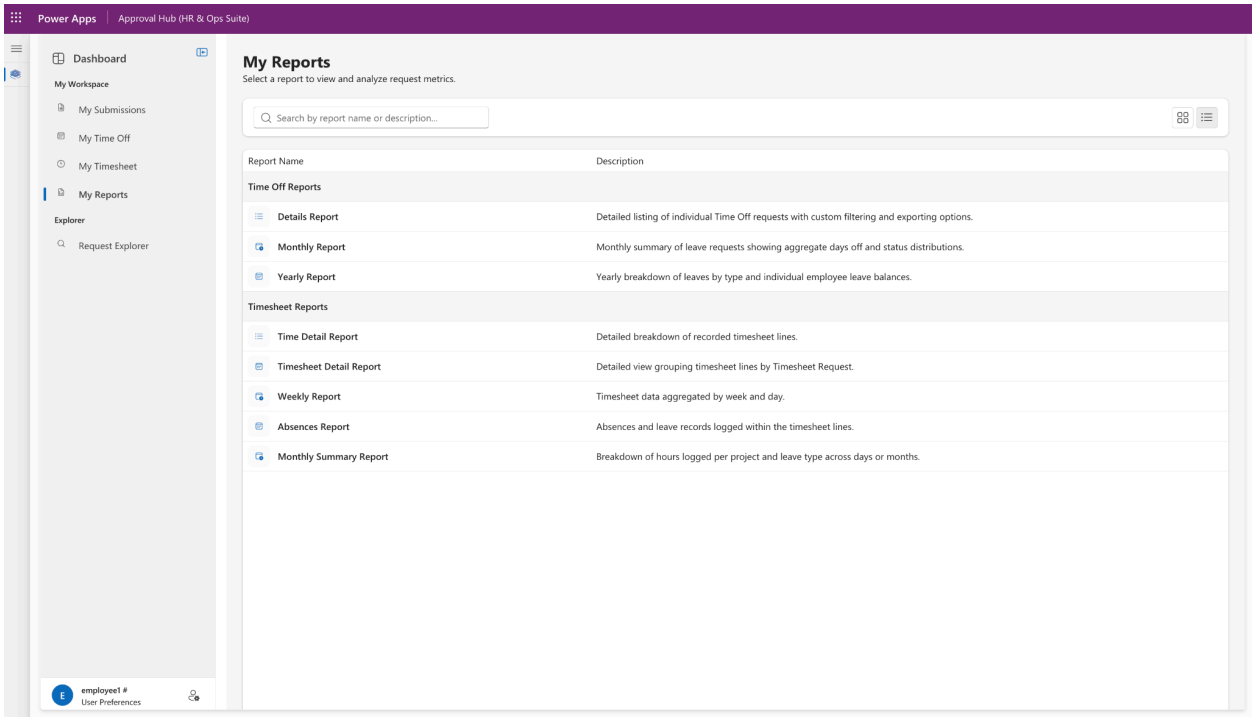
- **Fiscal Year Selector:** Use the dropdown menu at the top of the window to filter your balance information by a specific fiscal year (e.g., 2026).
- **Comprehensive Leave Table:** The central table provides a row-by-row breakdown for each leave category (e.g., Annual Leave, Sick Leave, Time-off in Lieu), including:
    - **Remaining from Prev Year:** The balance carried over from the previous fiscal period.
    - **Taken Remaining from Prev Year:** Usage accounted against carried-over balances.
    - **Allowed Hours:** The total leave entitlement allocated for the current fiscal year.
    - **Taken:** The total amount of leave already utilized within the current period.
    - **Remaining:** Your current available balance, calculated automatically by the system.

- **Help Documentation:** Click the 'How it calculated?' link in the top-right corner for additional context on how your specific leave balances are derived.



Access the 'My Balances' window to review your leave quotas.

2.5. My Reports

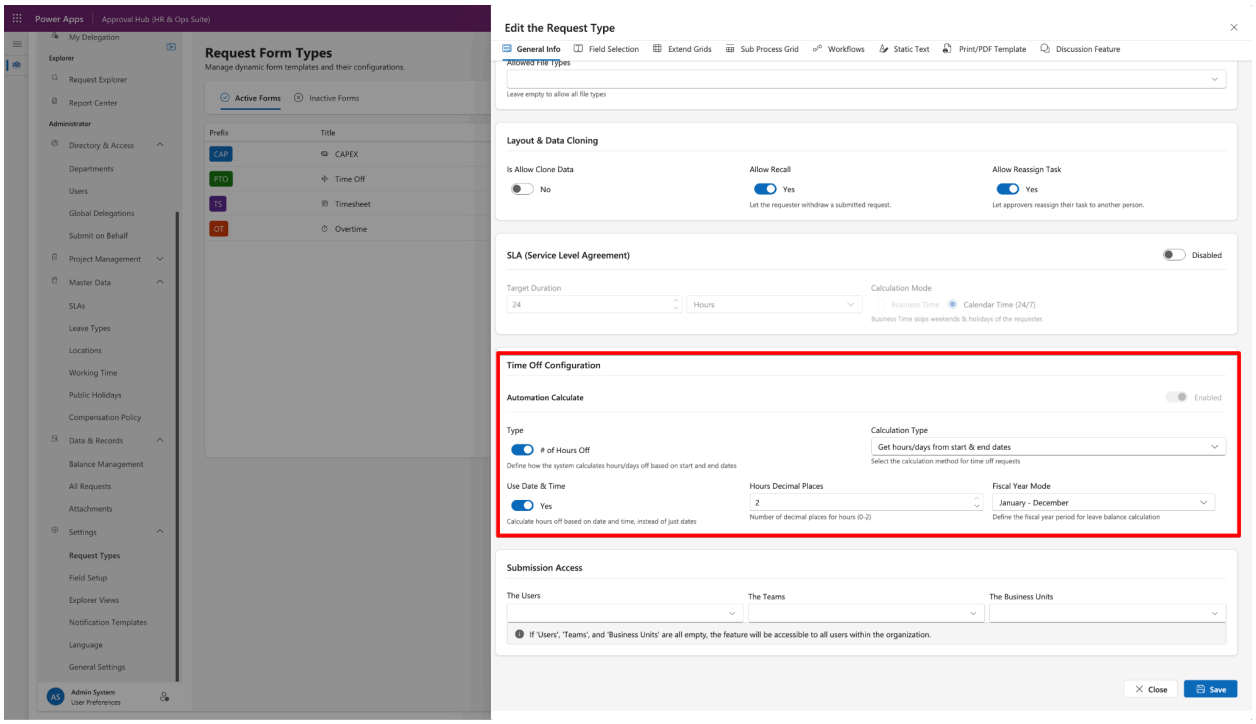


Analyze your performance data via the 'My Reports' section.

- **Time Off Reports:**
    - **Details Report:** View a comprehensive listing of individual time-off requests with customizable filtering and exporting capabilities.
    - **Monthly Report:** Access a monthly summary of leave requests, providing insights into aggregate days off and status distributions.
    - **Yearly Report:** Review a yearly breakdown of leaves, organized by type, along with individual employee leave balances.

3. Configurations

3.1 Time Off Setting



The Time Off Configuration section allows administrators to define the core calculation logic for leave requests.

- **Automation Calculate:** Toggle this switch to enable automated calculations of hours/days off based on the selected start and end dates.
- **Calculation Parameters:**
    - **Type:** Specify if the request is based on '# of Hours Off'.
    - **Calculation Type:** Choose the method for calculating duration (e.g., 'Get hours/days from start & end dates').
    - **Use Date & Time:** Toggle 'Yes' if the system should calculate leave based on specific dates and times, rather than just full-day dates.
    - **Hours Decimal Places:** Select the number of decimal places (0-2) to display for calculated hours.
- **Fiscal Year Mode:** Select the fiscal period (e.g., 'January - December') that determines the cycle for leave balance accumulation and reset.

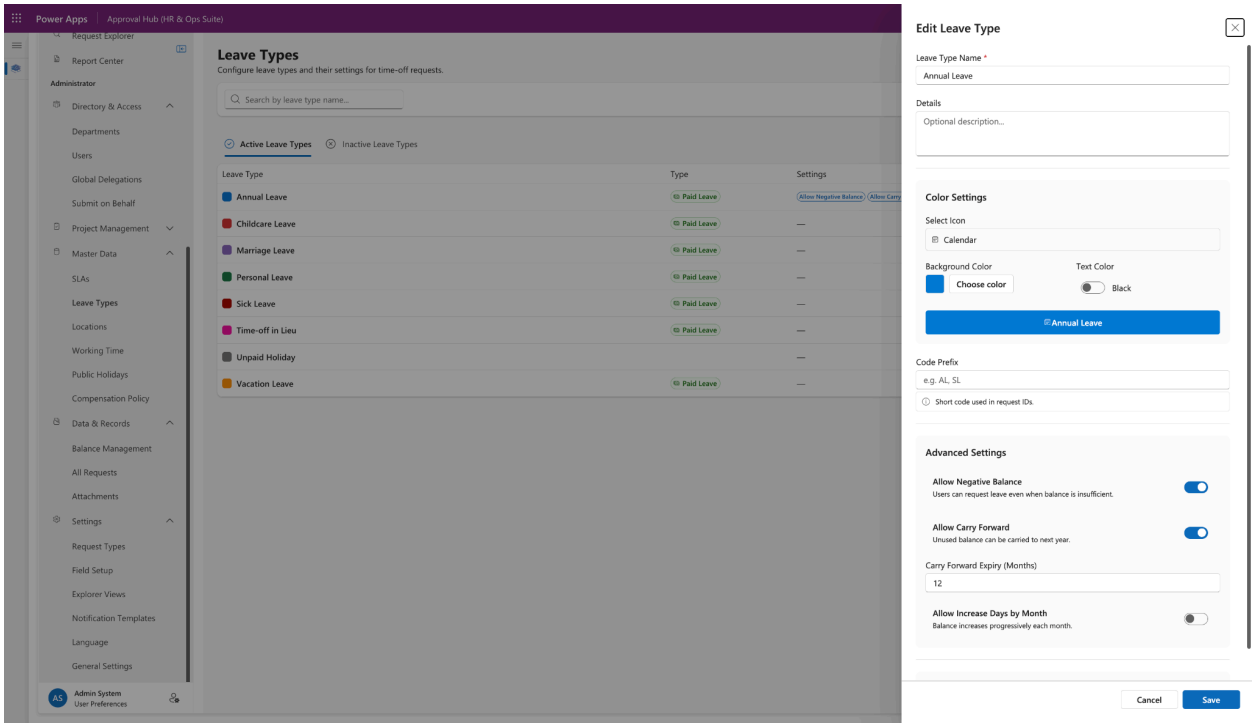
Submission Access

This section controls which employees can view and submit requests for this form type:

- **User/Group Filtering:** You can restrict form access by selecting specific 'Users', 'Teams', or 'Business Units' from the respective dropdown menus.
- **Global Access:** If the 'Users', 'Teams', and 'Business Units' fields are left blank, the request form will be accessible to all users across the entire organization.

3.2. Leave Type Configuration

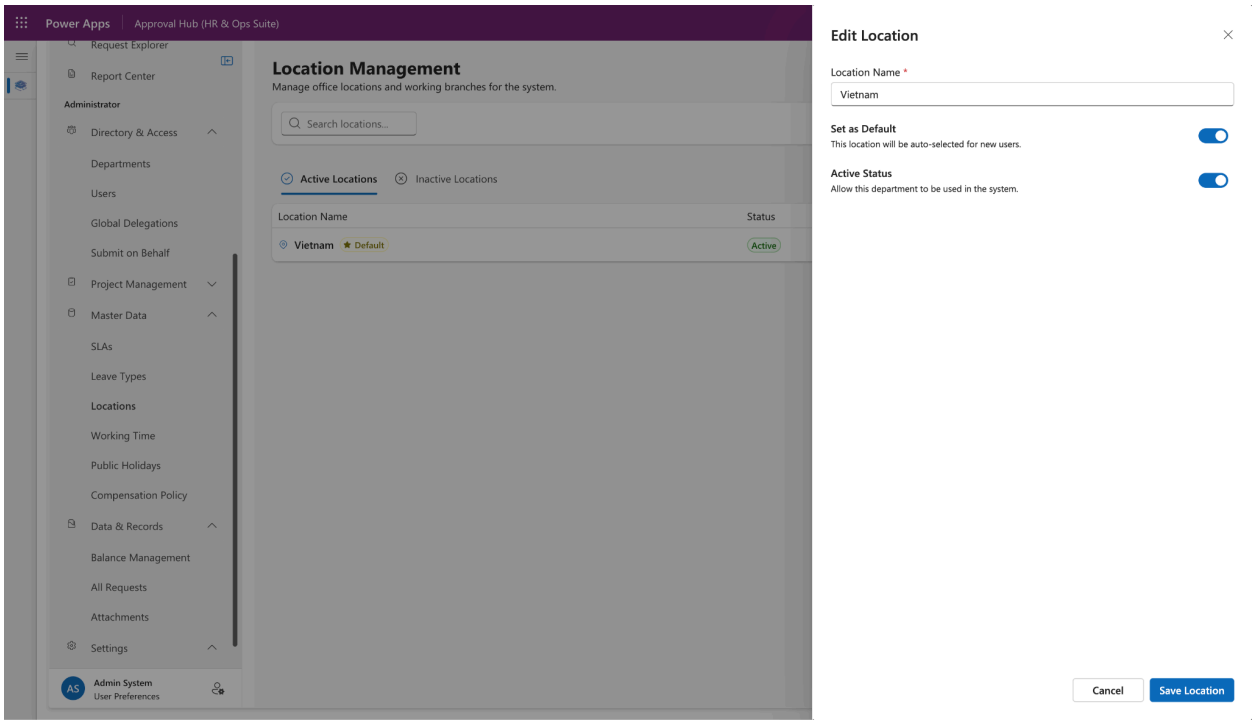
This section allows administrators to define and customize specific leave categories and their associated rules within the system.



- **Basic Information:**
  - **Leave Type Name:** Enter the name for the leave category (e.g., Annual Leave).
  - **Details:** Provide a description or notes about the leave type.
- **Color Settings:** Define the visual appearance of the leave type in the system interfaces:
  - **Select Icon:** Choose an icon to represent this leave category.
  - **Background Color:** Select a specific background color for the leave type label.
  - **Text Color:** Toggle the switch to set the text color to black or default.

- **Code Prefix:** Define a unique short code used in request IDs for this leave type (e.g., 'AL' for Annual Leave).
- **Advanced Settings:** Configure operational rules for leave management:
    - **Allow Negative Balance:** Toggle to permit users to request leave even when their remaining balance is insufficient.
    - **Allow Carry Forward:** Toggle to enable unused leave balances to be transferred to the next fiscal year.
        - **Carry Forward Expiry (Months):** Specify the number of months the carried-forward balance remains valid.
    - **Allow Increase Days by Month:** Toggle to enable automated, progressive monthly balance increases for this leave type.

3.3 Location

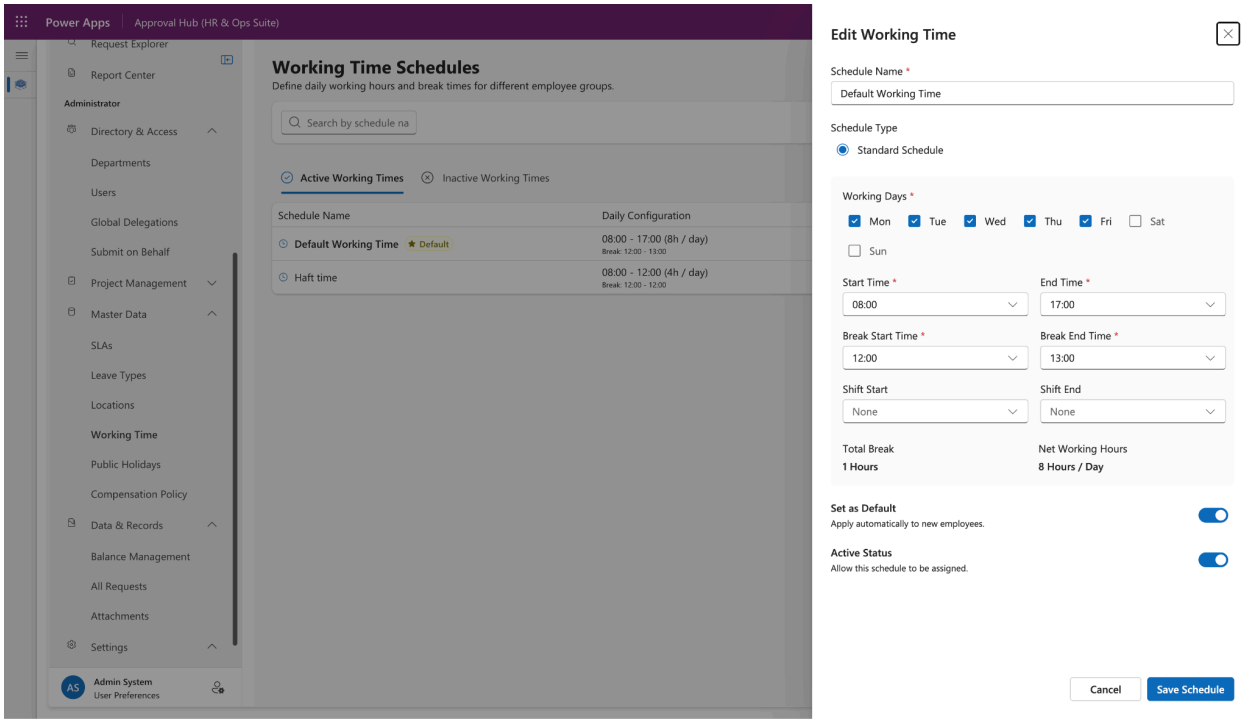


The Location Management section enables administrators to organize and maintain different office branches or geographical sites within the Approval Hub ecosystem. Use the following features to manage your organizational locations:

- **Location Overview & Search:** Use the central search bar to quickly find specific locations by name. You can also toggle between the **'Active Locations'** and **'Inactive Locations'** tabs to filter the list based on current system availability.

- **Edit Location Configuration:** When adding or modifying a branch in the **'Edit Location'** modal, configure the following fields:
    - **Location Name:** Enter the unique identifier for the office or branch (e.g., Vietnam).
    - **Set as Default:** Toggle this switch to ensure this location is automatically selected for new users joining the organization.
    - **Active Status:** Use this toggle to enable or disable the branch. Disabling a location prevents it from being used in the system while preserving its historical data.
- **Location Name:** Define the branch name.

3.4 Working Time

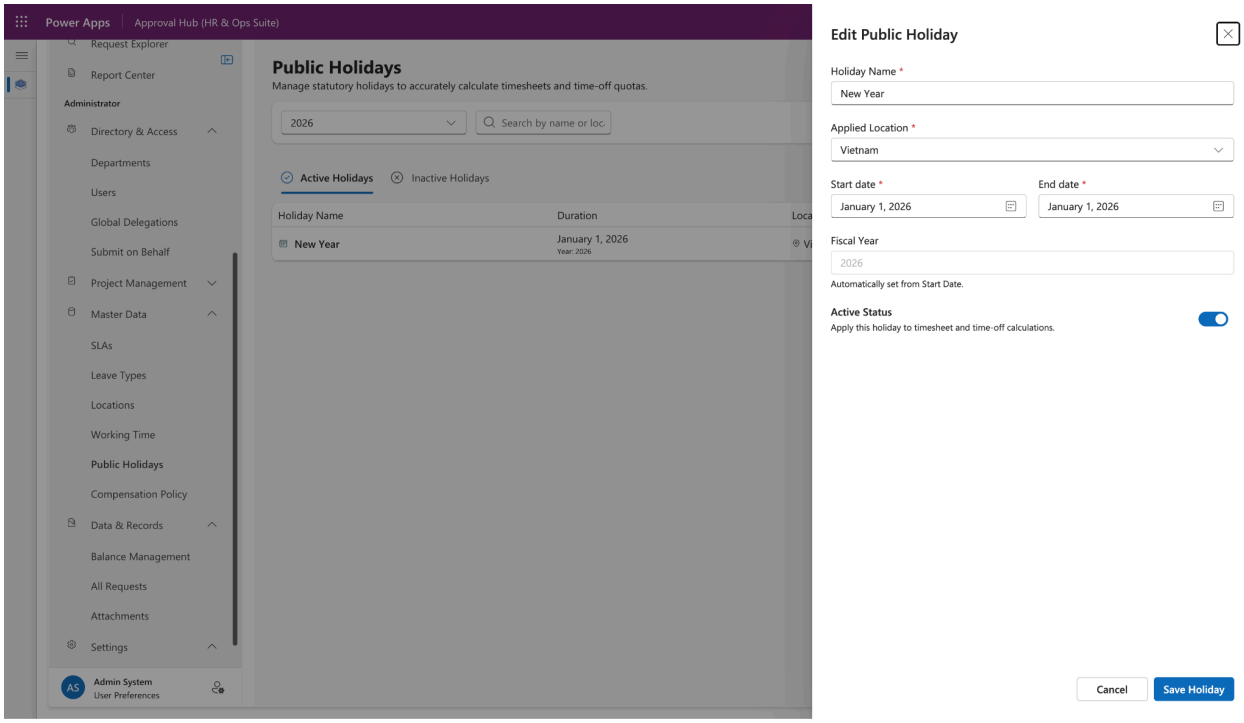


Configure operational schedules:

- **Schedule Type:** Create 'Standard' or custom schedules.
- **Daily Configuration:** Select working days and define start/end times.
- **Break Times:** Input break start/end times; the system will automatically calculate 'Net Working Hours'.
- **Edit Working Time Configuration:** When adding or modifying a schedule in the 'Edit Working Time' modal, configure the following fields:

- **Schedule Name:** Enter a unique identifier for the working time schedule (e.g., Default Working Time).
- **Schedule Type:** Create 'Standard' or custom schedules based on organizational needs.
- **Working Days:** Use the checkboxes to select the active work days for this schedule (Mon-Sun).
- **Time Configuration:**
  - **Start Time & End Time:** Define the daily working hours.
  - **Break Start Time & Break End Time:** Input specific windows for scheduled breaks.
  - **Total Break & Net Working Hours:** These values are automatically calculated by the system based on your time inputs.
  - **Shift Start & Shift End:** Optional fields to define specific shift timings if applicable.
- **Settings:**
  - **Set as Default:** Toggle this switch to apply this schedule automatically to all new employees.
  - **Active Status:** Use this toggle to enable or disable the schedule for assignment within the system.

3.5 Public Holiday



The Public Holiday page allows administrators to manage statutory holidays that impact leave and timesheet calculations. Use the central search bar to find specific entries, or toggle between the **'Active Holidays'** and **'Inactive Holidays'** tabs. Additionally, use the year dropdown menu to filter and view holidays for a specific fiscal period.

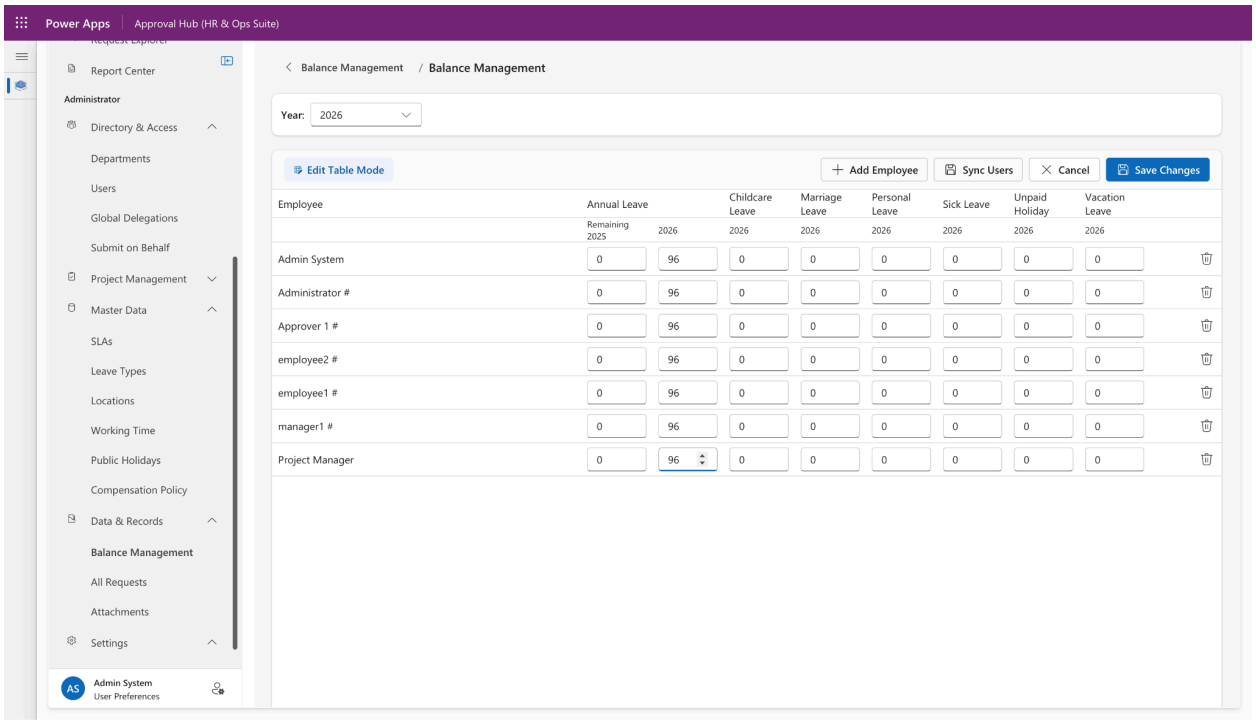
Edit Public Holiday Configuration:

- **Holiday Name:** Define the unique name of the public holiday.
- **Applied Location:** Select the specific branch or geographical location to which the holiday applies from the dropdown menu.
- **Start date & End date:** Define the specific duration of the holiday.
- **Fiscal Year:** This field is automatically populated by the system based on the selected Start Date.
- **Active Status:** Use this toggle to apply or disable the holiday. When active, the holiday is included in automated leave and timesheet calculations.

3.6 Balance Management

The Balance Management section provides administrators with centralized control over leave quotas for all employees. Administrators can perform bulk updates, set default values, and manage carry-forward policies for specific leave types.

3.6.1 Update the balance manually

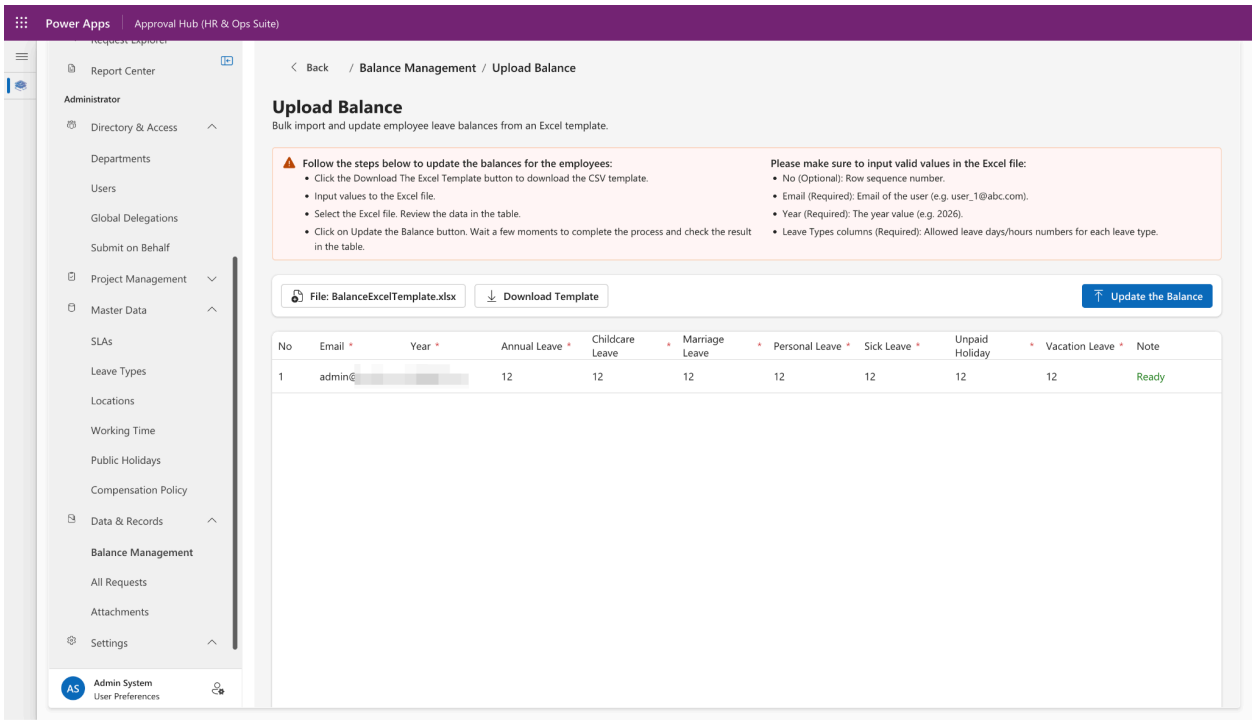


Administrators can update individual employee balances directly within the interface:

1. Navigate to 'Balance Management' under 'Data & Records'.
2. Select the relevant fiscal year from the dropdown menu.
3. Click 'Edit Table Mode' to enable direct cell editing.
4. Modify the balance values for each employee and leave type as needed.
5. Click 'Save Changes' to apply the updates.

Additionally, you can use 'Add Employee' to manually include new users or 'Sync Users' to refresh the employee list.

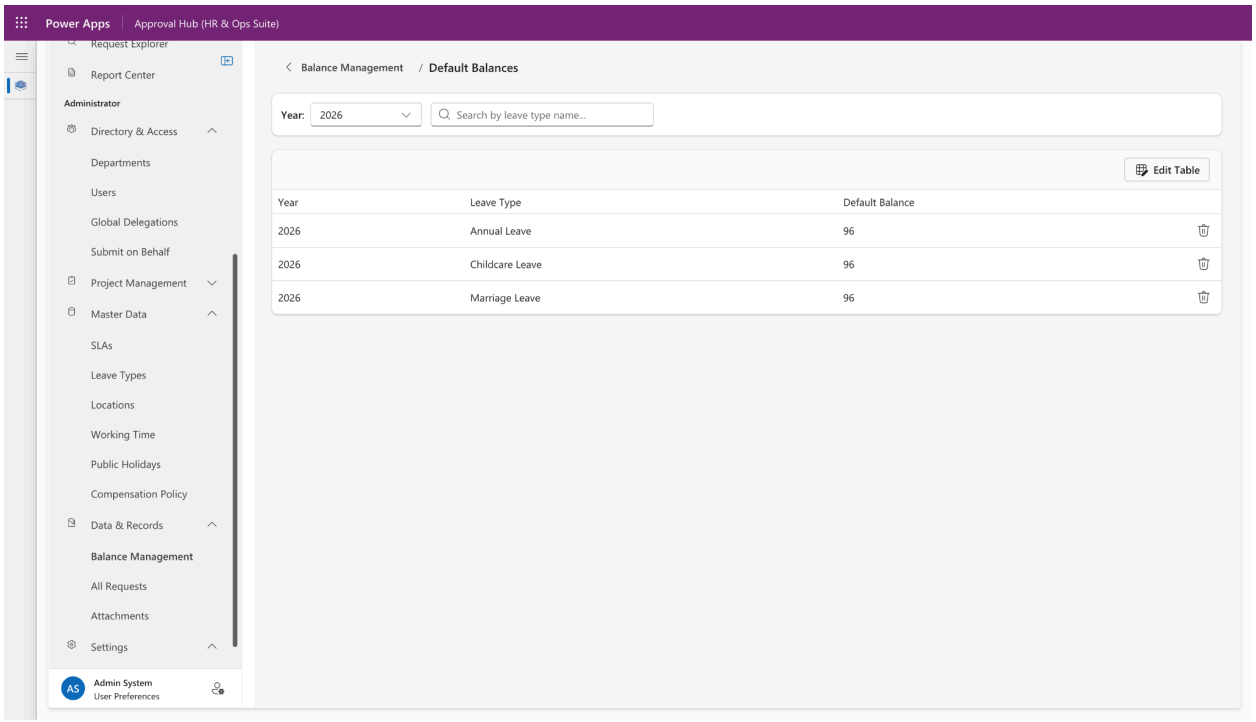
3.6.2 Update the balance by Excel file



For bulk modifications, administrators can use the Excel import tool:

1. Click the 'Download Template' button to acquire the standardized CSV template.
2. Enter the required information into the Excel file:
    -. **Email:** Use the registered system email for the user.
    -. **Year:** Specify the target fiscal year (e.g., 2026).
    -. **Leave Types:** Input the allowed leave hours/days for each category.
3. Once completed, upload the file in the 'Upload Balance' section.
4. Review the parsed data displayed in the table.
5. Click 'Update the Balance' to process the bulk import.

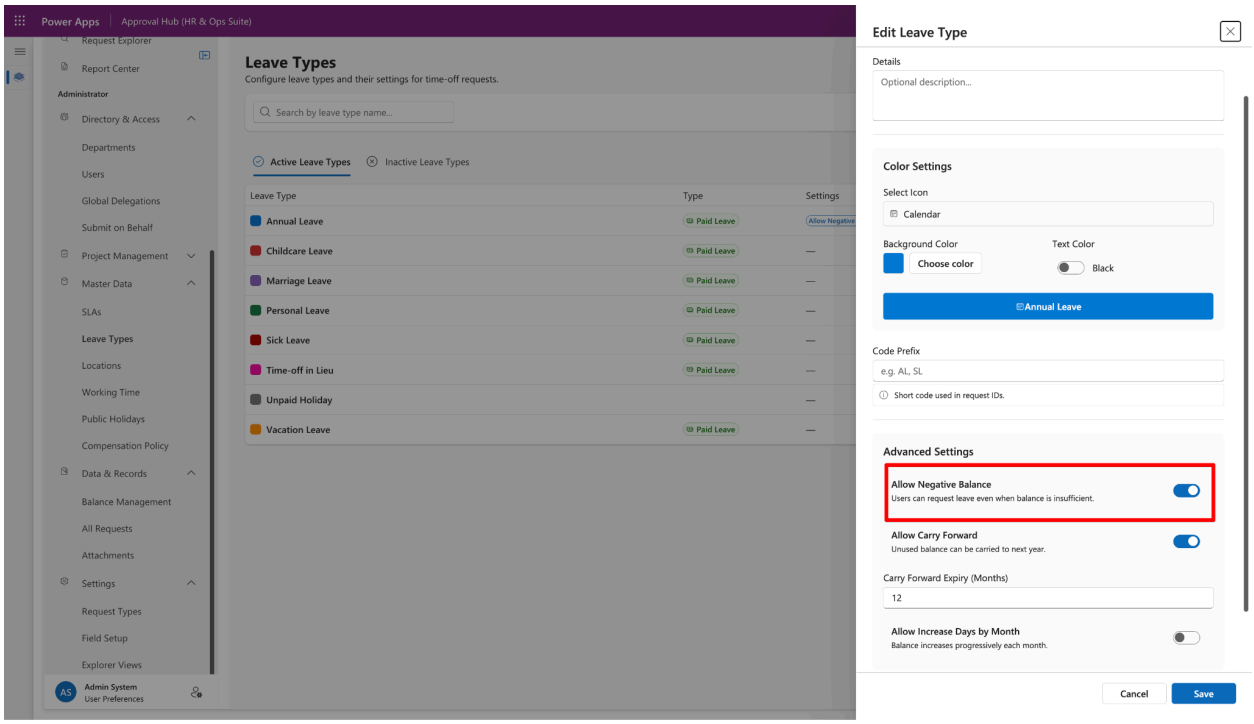
3.6.3 Default the balance



Ensure consistent leave allocation for all users by setting up default opening balances:

1. Access the 'Default Balances' tab within Balance Management.
2. Select the target fiscal year and, if necessary, use the search bar to find specific leave types.
3. Click 'Edit Table' to input standard default values for each leave category.
4. Save your changes to ensure these values are applied systematically.

3.6.4 Carry forward leave days/hours into the next year



To automate the transfer of remaining leave balances to the next fiscal year:

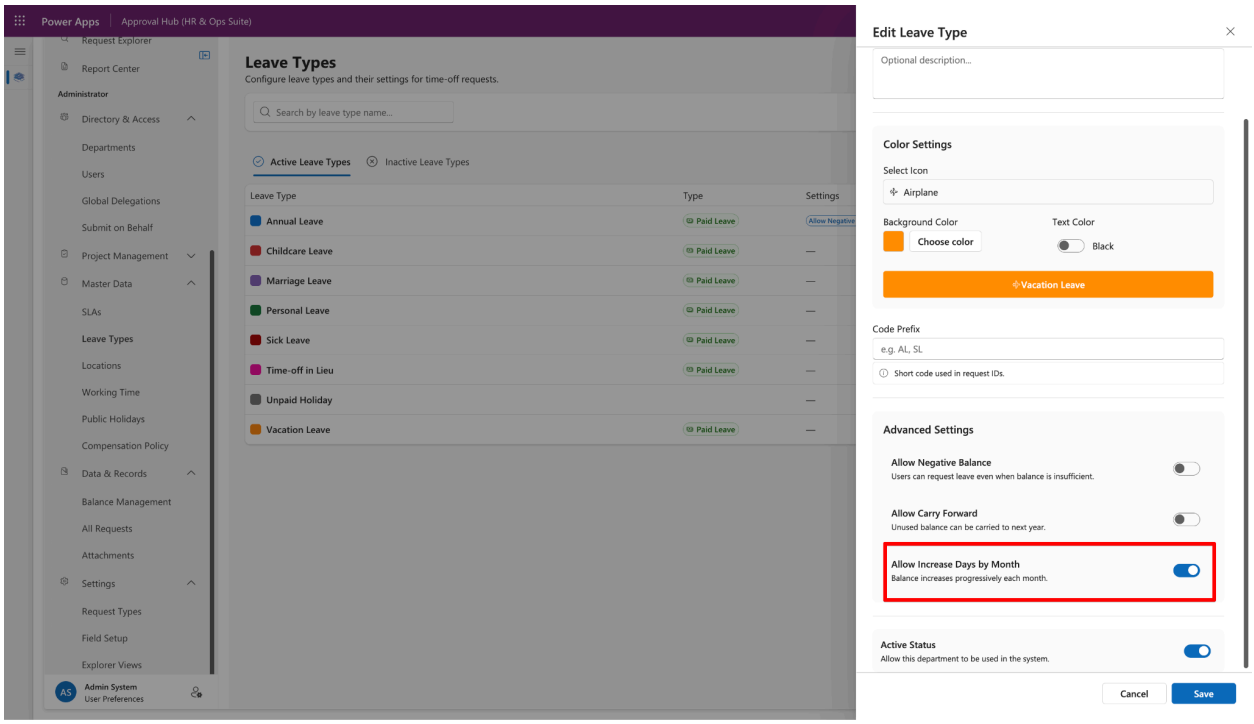
1. **Enable:** Go to 'Leave Types' configuration and verify that 'Allow Carry Forward' is toggled on.
2. **Automated Transfer:** Use the 'Update Remaining Previous Year' tool:
    - Select the desired leave type and year.
    - The system calculates the carry-over using the formula: (Allowed + Remaining Prev Year) - Taken = New Remaining.
    - Click 'Update the Remaining' to execute the calculation.
3. **Manual Adjustment:** Alternatively, you can navigate to the main 'Balance Management' table and manually edit the 'Remaining [Previous Year]' column for specific employees and save your changes.

3.7 Increase the number of hours/days allocated by Month

This feature automates progressive leave accrual, allowing organizations to increase leave balances gradually throughout the year rather than assigning the full entitlement at the start of the fiscal period.

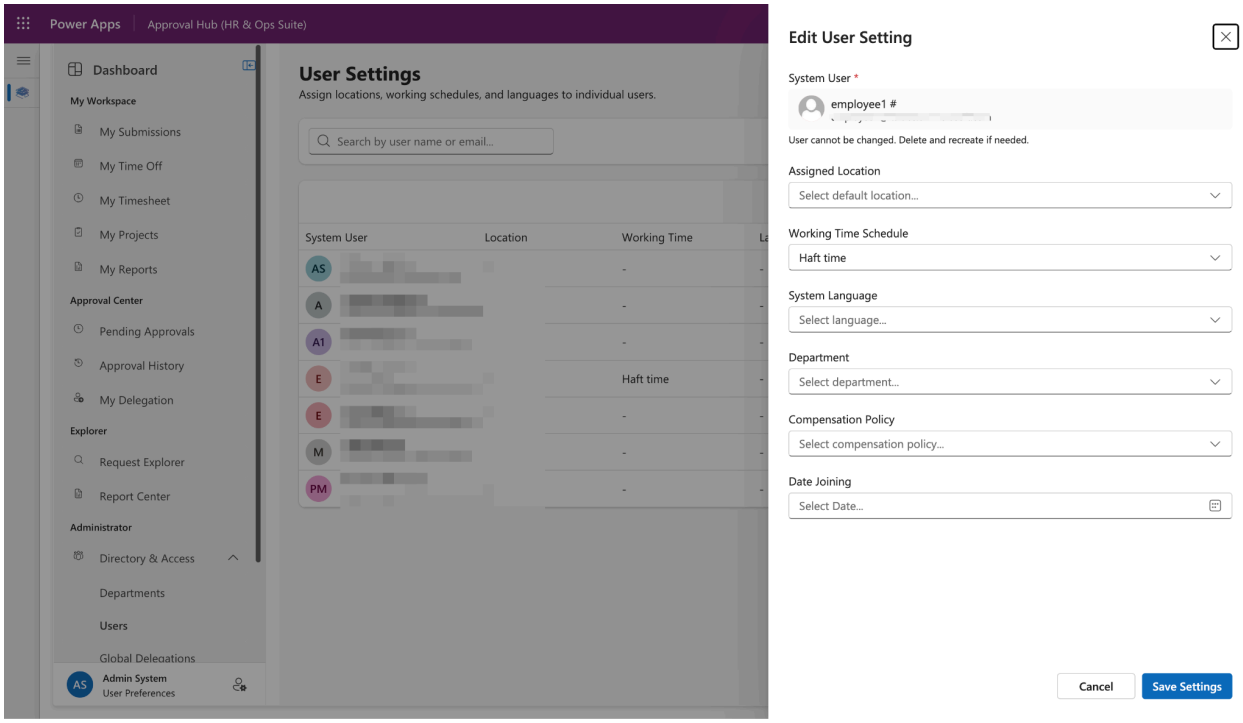
1. Navigate to the 'Leave Types' section under Administrator settings.
2. Select the specific leave type you wish to configure and open its settings.

3. Locate the 'Advanced Settings' area.
4. Toggle the 'Allow Increase Days by Month' switch to 'On' to activate the automated monthly accrual.



In the Leave Type settings, enable 'Allow Increase Days by Month' to trigger the automated progression of leave balances on a monthly basis.

3.8. User Settings



The User Settings module allows administrators to map organizational policies (Working Time and Compensation) to specific employees. Properly maintaining these settings is vital, as they serve as the foundational parameters for automated overtime calculations and leave accruals.

Configuration Fields

When editing an individual user's profile, the following parameters are available:

- **System User:** Displays the identity of the employee. Note that the user identity cannot be changed once created; it must be deleted and recreated if necessary.
- **Assigned Location:** Define the geographic or site-specific location for the employee, which may impact holiday calendars or regional compliance rules.
- **Working Time Schedule:** Select the predefined schedule that governs the employee's standard working hours. This setting directly affects the system's ability to calculate overtime eligibility.
- **System Language:** Sets the preferred interface language for the user.
- **Department:** Assign the user to the correct organizational unit for reporting and hierarchical approval structures.
- **Compensation Policy:** Link the user to the appropriate compensation rule set (e.g., 'Default Compensation Policy'). This ensures that when the user submits an OT request, the correct multipliers (standard, weekend, holiday) are automatically applied.

- **Date Joining:** Record the employee's start date, which can be utilized for tenure-based reporting or policy eligibility tracking.

Always click **'Save Settings'** after making any modifications to ensure the updates are applied to the user's future requests.

4. Additional Resources

For advanced administrative configurations not covered in this guide—such as setting up global delegations, configuring notification templates, managing system languages, or customizing request explorer views—please consult the comprehensive system documentation provided below:

- Administrator Guide
- End-User & Approver Manual