



## Feature Description Document

### Understanding Leave Management using IXM TIME



## Purpose

This document outlines the process of configuring of Leaves, Leave Groups, Credit Policies and Leave Balance transactions in IXM TIME.

## Applies to

|             |             |             |             |             |             |
|-------------|-------------|-------------|-------------|-------------|-------------|
| TITAN       | TFACE       | TOUCH 2     | SENSE 2     | MERGE 2     | MYCRO       |
| All Devices |

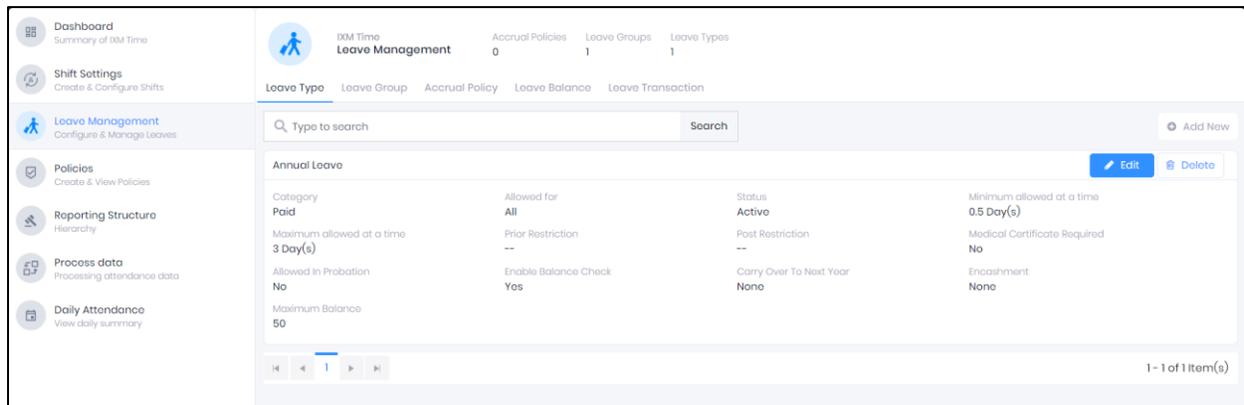
## Description

Leave Management allows IXM WEB users to create and configure different types of Leaves as per the company policy.

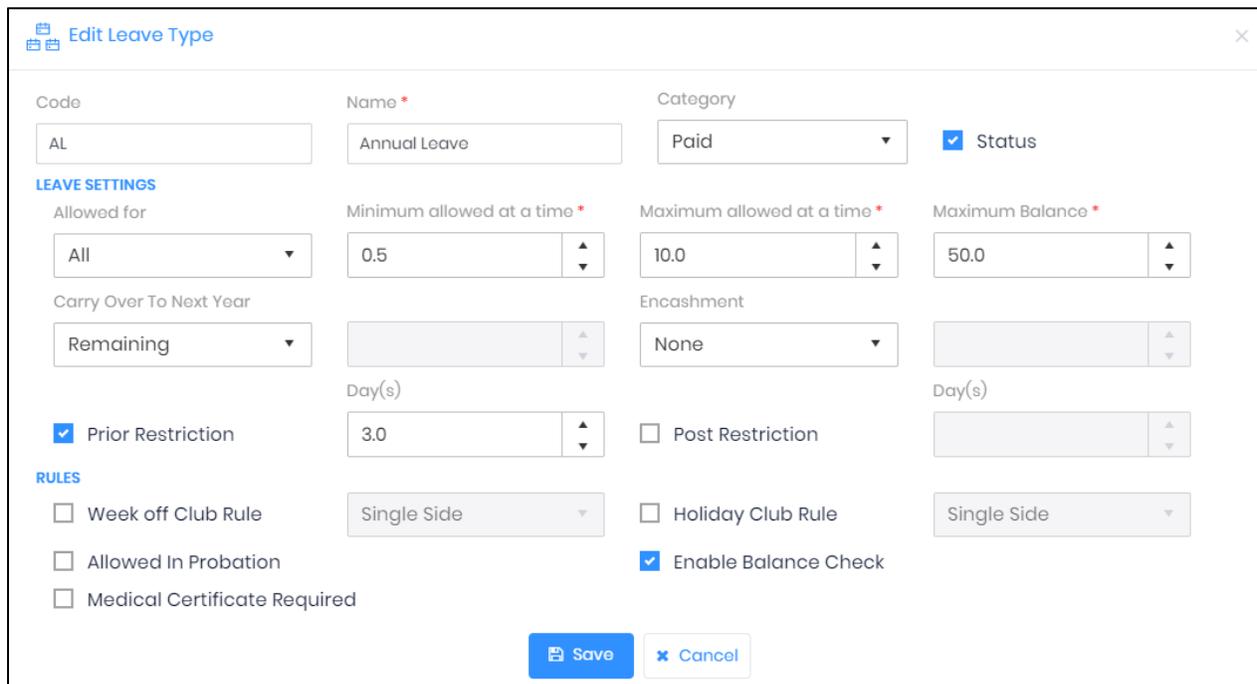


## Leave Type

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Leave Management** >> Navigate to the **Leave Type** tab.



2. One shift will be created by default in the software. You can either modify the available shift or add a new shift.
3. Click **Add New** to add a new shift or Click **Edit Shift** to edit an existing Shift.





4. The various fields and their details are explained below:

▪ **Leave Details:**

- **Code:** Define the shortcode for the Leave.
- **Name:** Give the Leave Type a name.
- **Category:** Assign Category to the Leave from the drop-down:
  - **Paid:** Select this if the Leave Type is supposed to be a Paid Leave for the employee. Leave Balance is required for this leave category for leave transaction and request.
  - **Unpaid:** Select this if the Leave Type is supposed to be an Unpaid Leave for the employee. Leave Balance is not required for this leave category.
  - **Tour:** Select this if the Leave Type is supposed to be when an employee goes on a company tour. Leave Balance is not required for this leave category.
- **Status:** Enable Leave status to mark the Leave Type as active.

▪ **Leave Settings:**

- **Allowed For:** Select an option from the drop-down to specify whether the leave applies to all employees or selected employee subsets.
- **Minimum Allowed at a time:** Specify the minimum number of days for this leave type. Employees will have to request at least these many days when applying for this leave type.
- **Maximum Allowed at a time:** Specify the maximum number of days for this leave type. Employees will be able to request up to these many days when applying for this leave type.
- **Maximum Balance:** Specify the maximum balance that employees can have for this Leave type at a time during the Leave Balance period.
- **Carry Forward To Next Year:** Select an option from the drop-down to specify and configure whether an employee's leave balance shall be Carry Forwarded To Next Year or not for this Leave Type.
- **Encashment:** Select an option from the dropdown to specify and configure whether encashment is allowed or not for this Leave Type.
- **Prior Restriction:** The minimum number of days up to which an employee can request this Leave Type before the first leave date.
- **Post Restriction:** The minimum number of days up to which an employee can request this Leave Type after the last leave date.



- **Rules:**
  - **Week off Club Rule:** Enabling this rule will consider the Week off day as a Leave if it is in continuation with or part of the requested Leave Dates (either before or after or on both sides of Week off). Select an option from the dropdown:
    - **Single Side:** If Leave is applied before OR after a Week off day then the Week off day(s) will be considered as Leave(s).
    - **Both Side:** If Leave is applied before AND after Week off day then the Week off day(s) will be considered as Leave(s).
  - **Holiday Club Rule:** Enabling this rule will consider a Holiday as a Leave if it is in continuation with or part of the requested Leave Dates (either before or after or on both sides of Holiday). Select an option from the dropdown:
    - **Single Side:** If Leave is applied before OR after a Holiday then the Holiday(s) will be considered as Leave(s).
    - **Both Side:** If Leave is applied before AND after a Holiday then the Holiday(s) will be considered as Leave(s).
  - **Allowed in Probation:** Disable this flag if this leave is not allowed in the probation period.
  - **Enable Balance Check:** Enable this flag for the Paid Leave category to allow transactions for that leaves.
  - **Medical Certificate Required:** Enable this flag if a medical certificate is required to be uploaded by the employee for this leave.



## Leave Group

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Leave Management** >> Navigate to the **Leave Group** tab.

| Leave Type | Leave Group           | Accrual Policy | Leave Groups | Leave Types |
|------------|-----------------------|----------------|--------------|-------------|
| No         | IXM India Leave Group | 2              | 1            | 3           |

2. Click **Add New** to create a new Leave Group or Click **Edit** to edit an existing Leave Group.
3. Give a name to the new Leave Group and select the Leave Types from the existing Leave Types that will apply to this Leave Group. When this group is assigned to an employee, all the Leave Types of the Leave Group will be applied to the employee.

Name \*

IXM\_India Leave Group  Default

**SELECT LEAVE TYPE**

Annual Leave  Sick Leave  Business Trip



## Accrual Policy

Leave Balance is credited to the employees as per the company's accrual policy.

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Leave Management** >> Navigate to the **Accrual Policy** tab.

| Policy Name                     | Policy Period | January           | February | March | April | May | June | July | August | September | October | November | December |
|---------------------------------|---------------|-------------------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|
| IXM India Credit Policy         | Monthly       | 1.5               | 1.5      | 1.5   | 1.5   | 1.5 | 1.5  | 1.5  | 1.5    | 1.5       | 1.5     | 1.5      | 1.5      |
| IXM Canada Yearly Credit Policy | Yearly        | Yearly Credit: 18 |          |       |       |     |      |      |        |           |         |          |          |

2. Click **Add New** to create a new Accrual Policy or Click **Edit** to edit an existing Accrual Policy.

Name \*

Policy Period: **Monthly**

|              |               |                |
|--------------|---------------|----------------|
| January: 0.0 | February: 0.0 | March: 0.0     |
| April: 0.0   | May: 0.0      | June: 0.0      |
| July: 0.0    | August: 0.0   | September: 0.0 |
| October: 0.0 | November: 0.0 | December: 0.0  |



3. The various fields and their details are explained below:
- **Name:** Specify the Name for the Accrual Policy.
  - **Policy Period:** Select the option from the dropdown for whether the Accrual will be monthly or yearly.
  - Credit the leave balance based on the policy period.
  - **Monthly Policy Period:**

The screenshot shows a dialog box titled "Edit Accrual Policy". It contains a "Name" field with the text "IXM Monthly Credit Policy" and a "Policy Period" dropdown menu set to "Monthly". Below these are 12 monthly input fields, each labeled with a month (January through December) and containing the value "1.5". At the bottom are "Save" and "Cancel" buttons.

- **Yearly Policy Period:**

The screenshot shows a dialog box titled "Add Accrual Policy". It contains a "Name" field with the text "IXM Yearly Credit Policy" and a "Policy Period" dropdown menu set to "Yearly". Below these is a "Yearly Credit" input field containing the value "18.0". At the bottom are "Save" and "Cancel" buttons.

4. Click **Save** to save the changes made to the Accrual Policy.



## Leave Balance

Leave Balance will allow IXM WEB users to view an Employee's Leave Balance in detail for a selected period. Leave Balance can also be viewed for a particular Leave Type for the selected period.

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Leave Management** >> Navigate to the **Leave Balance** tab.

The screenshot shows the 'Leave Balance' tab in the IXM Time system. The interface includes a navigation bar with 'Leave Management' selected, and a breadcrumb trail: Leave Type > Leave Group > Accrual Policy > Leave Balance > Leave Transaction. The main area contains a search form with the following filters: Employee (Chris Mendoza), Leave Type (All), Period (Monthly), Month (December), and Year (2019). A 'Search' button is located to the right of the filters. Below the search form is a table with the following data:

| Name            | M...     | Ye... | Leave Type    | Opening Balance | Credit... | Debited | Encash... | Availed | Closing... |
|-----------------|----------|-------|---------------|-----------------|-----------|---------|-----------|---------|------------|
| ▶ Chris Mendoza | Decem... | 2019  | Annual Leave  | 0.00            | 2.00      | 0.00    | 0.00      | 0.00    | 2.00       |
| ▶ Chris Mendoza | Decem... | 2019  | Sick Leave    | 0.00            | 0.00      | 0.00    | 0.00      | 0.00    |            |
| ▶ Chris Mendoza | Decem... | 2019  | Business Trip | 0.00            | 0.00      | 0.00    | 0.00      | 0.00    |            |



- From the dropdowns, select the employee whose Leave Balance needs to be checked, the Leave Type if you want to view only selected Leaves for the employee, the period, month and year. Click **Search**. Click on any Search result to view details.

IXM Time  
Leave Management

Accrual Policies: 2 | Leave Groups: 1 | Leave Types: 3

Leave Type | Leave Group | Accrual Policy | **Leave Balance** | Leave Transaction

Employee: Chris Mendoza | Leave Type: All | Period: Yearly | Year: 2019 | Search

| Name  | Year | Leave Type    | Opening Balance | Credited | Debited | Encashed | Availed | ClosingB... |
|---|------|---------------|-----------------|----------|---------|----------|---------|-------------|
| Chris Mendoza   | 2019 | Annual Leave  | 0.00            | 2.00     | 0.00    | 0.00     | 1.00    | 1.00        |
| Date   Entry Type   Value   Remarks   Verdict By        |      |               |                 |          |         |          |         |             |
| 12/26/2019 16:19 PM   Credit   2     admin              |      |               |                 |          |         |          |         |             |
| 12/26/2019 16:27 PM   Avail   1   Personal Work   chris |      |               |                 |          |         |          |         |             |
| Chris Mendoza   | 2019 | Sick Leave    | 0.00            | 0.00     | 0.00    | 0.00     | 0.00    |             |
| Chris Mendoza   | 2019 | Business Trip | 0.00            | 0.00     | 0.00    | 0.00     | 0.00    |             |

1 to 3 of 3 Items



## Leave Transaction

IXM WEB users can credit leave(s) to an employee on a monthly and/or yearly basis. Leaves can also be debited and encashed from an employee's existing leave balance in case adjustment is required.

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Leave Management** >> Navigate to the **Leave Transaction** tab.

The screenshot shows a web form titled "LEAVE DETAILS". It contains several input fields and buttons. The "Period" section has a dropdown menu set to "Monthly". The "Month-Year" section has two dropdown menus: "December" and "2019". The "Entry Type" section has a dropdown menu set to "Credit". The "Leave Type" section has a dropdown menu set to "Annual Leave". The "Credit Mode" section has a dropdown menu set to "Fixed". The "Credit Value" section has a text input field containing "1.00" and a small up/down arrow icon. Below these fields is a "Remarks" section with a text area containing "As per HR's email". At the bottom of the form are three buttons: "Apply Filter", "Apply", and "Clear All".

2. The different fields and their details are explained below:
  - **Period:** Select the period: Monthly or Yearly for the leave transaction.
  - **Month-Year:** Specify month-year for this leave transaction.
  - **Entry Type:** Select the Entry Type from the dropdown:
    - Credit
    - Debit
    - Encash
  - **Leave Type:** Select the Leave Type for which you want to perform the leave transaction.
  - **Remarks:** Specify remarks for that transaction.



3. Click **Apply** to perform that transaction for All T&A Employee(s).
4. Click **Apply filter** to perform the transaction for particular Employee(s).

A screenshot of an 'Apply Filter' dialog box. At the top, there are two radio buttons for 'AND' and 'OR', with 'OR' selected. To the right is a blue '+' button. Below this, there is a list of filter criteria. The first criterion is 'Employee ID' with a dropdown arrow, followed by 'equal' with a dropdown arrow, and the value '1071' in a text input field. To the right of this row is a '-' button. Below it is another row with a dropdown arrow and another '-' button. At the bottom of the dialog, there are two buttons: a blue 'OK' button with a checkmark icon and a 'Clear Filter' button with a refresh icon.



## Support

For more information relating to this Feature Description document, please contact us at [support@invixium.com](mailto:support@invixium.com)

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