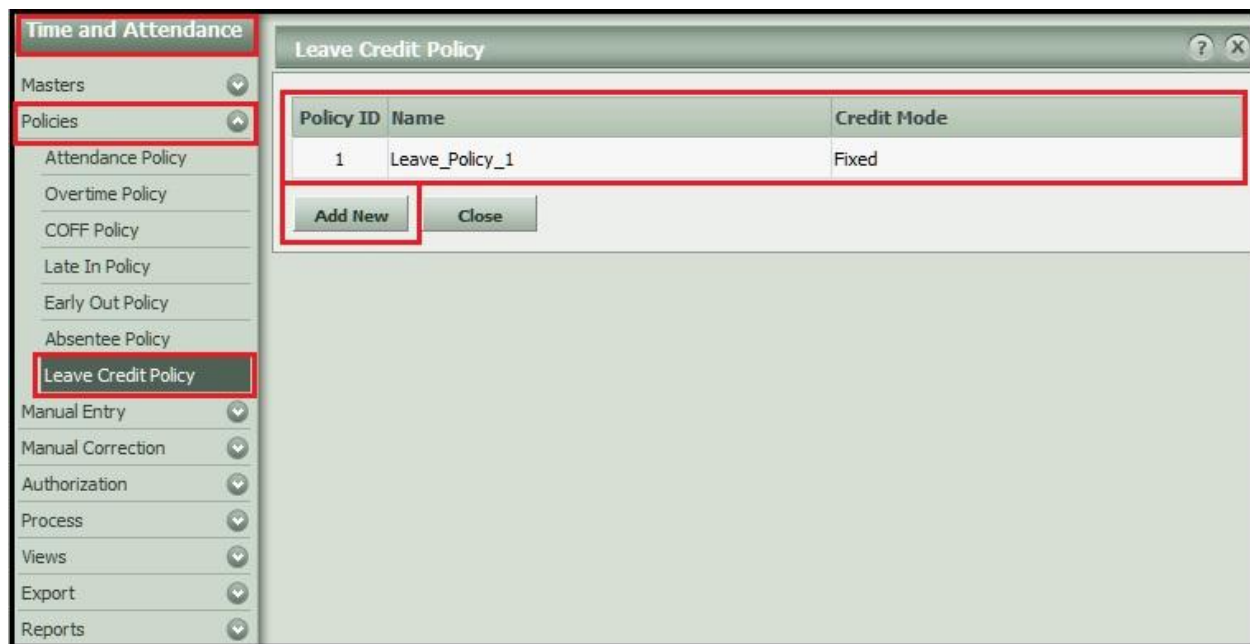


Matrix Technical Support Mailer – 34 Leave Credit Policy

Dear Friends,

This mailer will guide you to define and create leave credit policy for the effective use of crediting/debiting leaves which can be predefined in the system. This feature was introduced in the version **V04R02** and onwards.

This policy can be configured in Time and Attendance module.
Go to Time and Attendance → Policies → Leave Credit Policy.



One can edit the default Leave_Policy_1 already created. Or can add the new policy.



There are two modes of creating Leave Credit Policies:

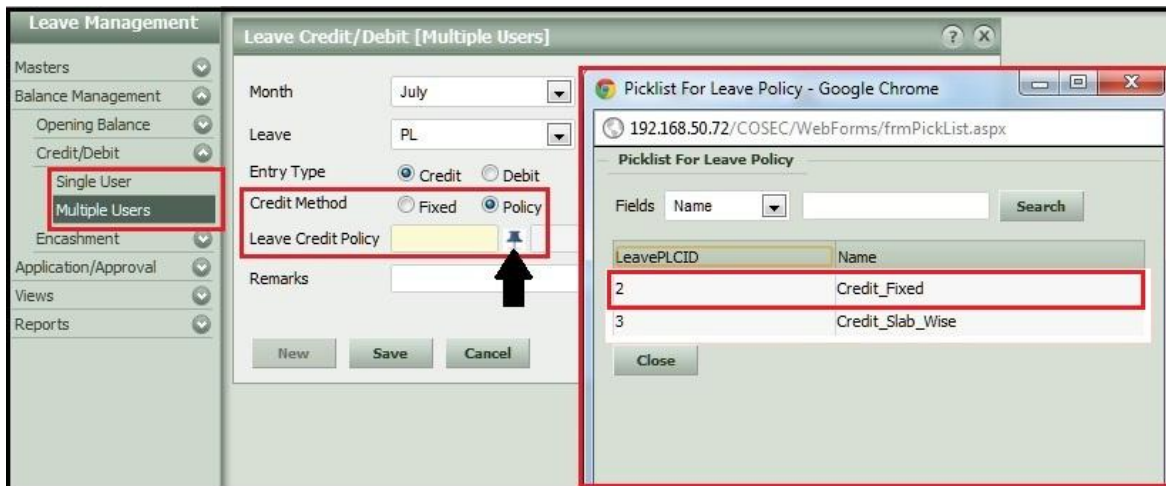
- ➔ Fixed Credit
- ➔ Slab-Wise



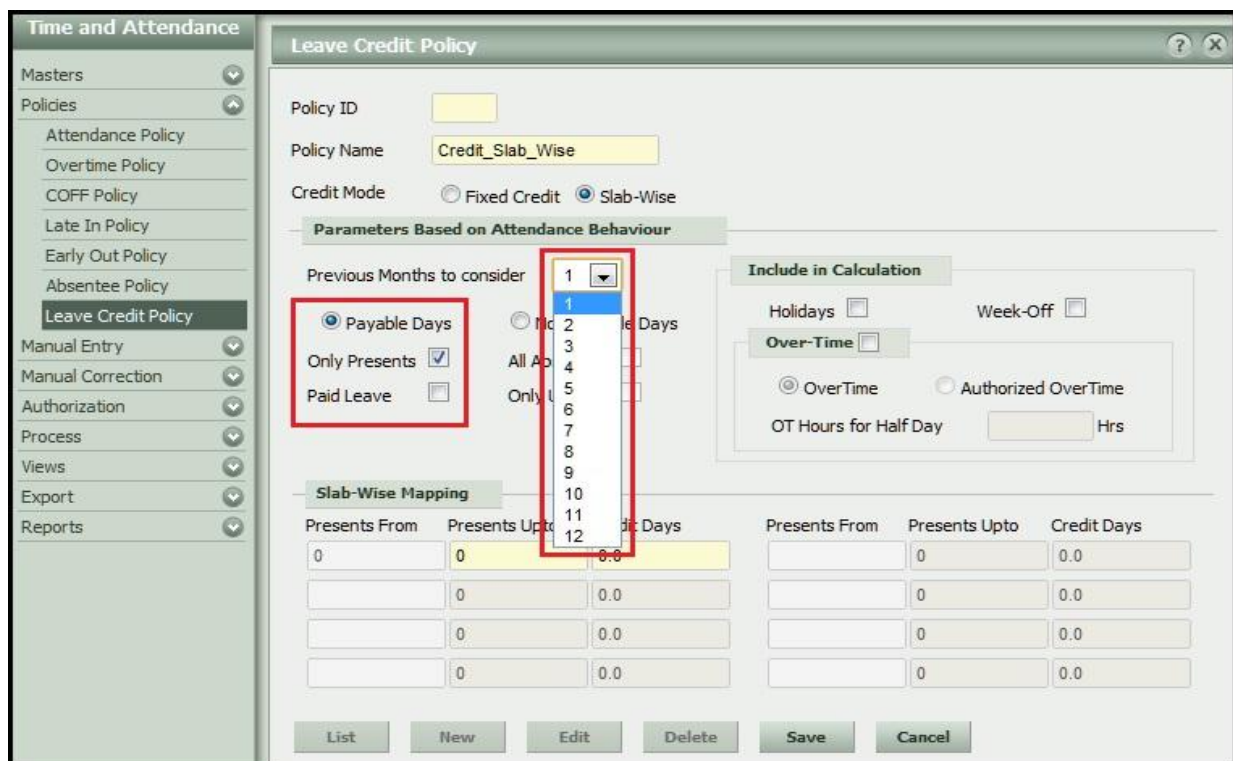
a. **Fixed Credit:** In this mode, one can find the Slab-Wise mapping fields for every month of the year.

For e.g. for the month of January specify the Credit Days.

After giving an appropriate user friendly name to the policy, one needs to save it.



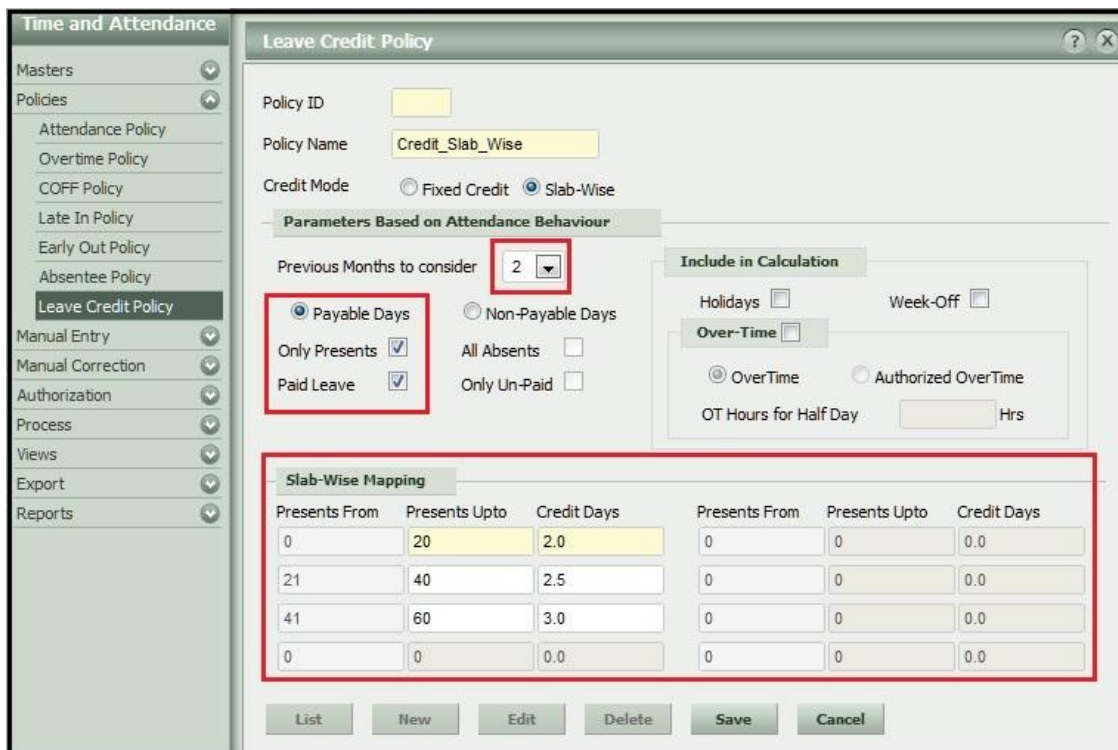
Selection of “**Credit method**” is provided for crediting leaves to the users. On selecting Credit method as Policy, on can browse the various policies defined through pick list. For e.g. select “Credit_Fixed”.



b. **Slab-Wise:** The Slab-Wise credit mode enables the user to configure parameters for leave credit based on the attendance pattern of the user.

c. Calculation: Selection of number of months to be taken into account for calculation.

- ➔ Enabling Payable or Non-payable days based on which leaves are to be credited.
- ➔ Enabling **Payable days** will credit leaves based on the number of present instances of the users. User can define the slabs based on the number of present markings.
- ➔ Enabling **Non-Payable days**, the user can define slabs based on the number of absent markings.



Leave Credit Policy

Policy ID:

Policy Name:

Credit Mode: Fixed Credit Slab-Wise

Parameters Based on Attendance Behaviour

Previous Months to consider:

Payable Days Non-Payable Days

Only Presents All Absents

Paid Leave Only Un-Paid

Include in Calculation

Holidays Week-Off

Over-Time

OverTime Authorized OverTime

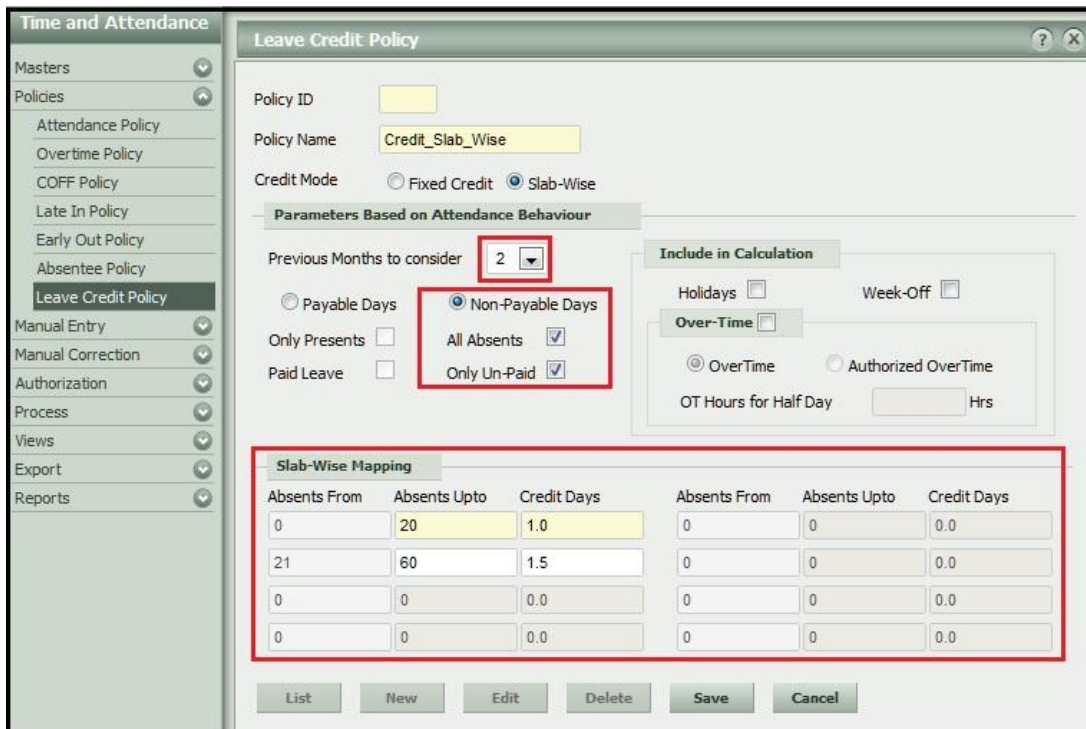
OT Hours for Half Day: Hrs

Slab-Wise Mapping

Presents From	Presents Upto	Credit Days	Presents From	Presents Upto	Credit Days
0	20	2.0	0	0	0.0
21	40	2.5	0	0	0.0
41	60	3.0	0	0	0.0
0	0	0.0	0	0	0.0

List New Edit Delete Save Cancel

In Slab-Wise mapping, specify the slab of the days in “Present From” and “Present Upto” fields. And accordingly specify the “Credit Days” for that slab.



Time and Attendance

Masters

Policies

- Attendance Policy
- Overtime Policy
- COFF Policy
- Late In Policy
- Early Out Policy
- Absentee Policy
- Leave Credit Policy**
- Manual Entry
- Manual Correction
- Authorization
- Process
- Views
- Export
- Reports

Leave Credit Policy

Policy ID:

Policy Name:

Credit Mode: Fixed Credit Slab-Wise

Parameters Based on Attendance Behaviour

Previous Months to consider:

Payable Days Non-Payable Days

Only Presents:

Paid Leave:

All Absents

Only Un-Paid

Include in Calculation

Holidays: Week-Off:

Over-Time

OverTime Authorized OverTime

OT Hours for Half Day: Hrs

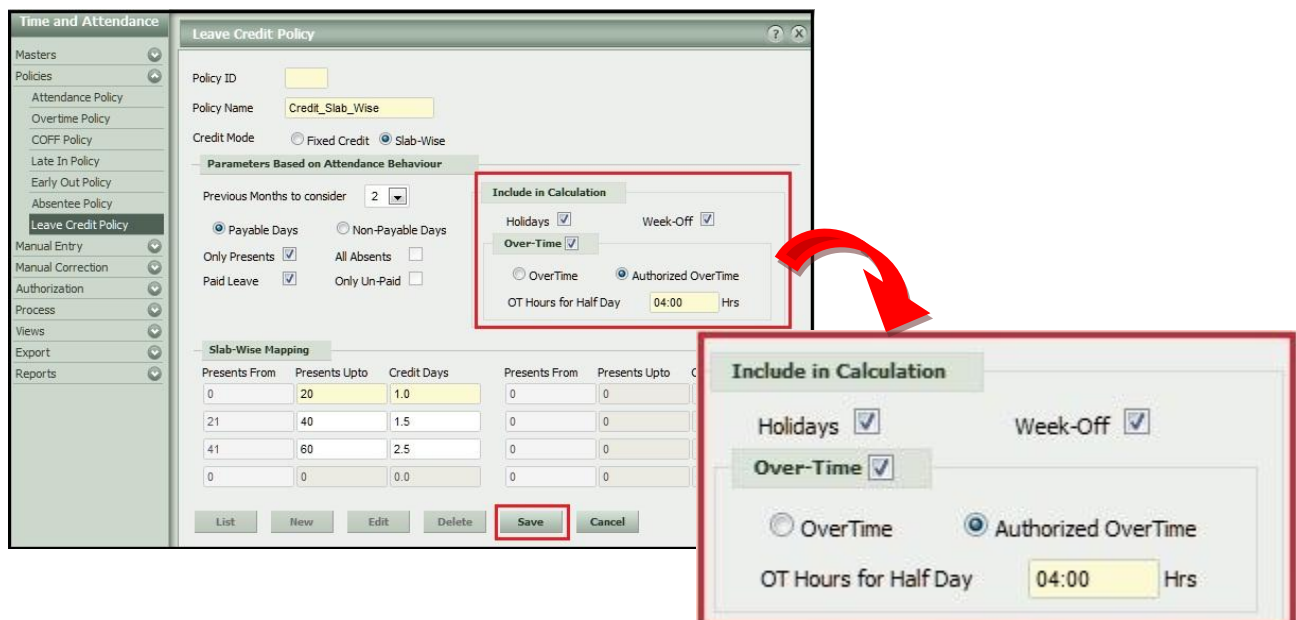
Slab-Wise Mapping

Absents From	Absents Upto	Credit Days	Absents From	Absents Upto	Credit Days
0	20	1.0	0	0	0.0
21	60	1.5	0	0	0.0
0	0	0.0	0	0	0.0
0	0	0.0	0	0	0.0

List New Edit Delete Save Cancel

a. The “**Include in Calculation**” section enables the user to specify whether the system needs to include Holidays as well as Week-offs in the day’s calculation.

b. The **Overtime** Section enables the user to specify whether the Overtime or Authorized Overtime instances are to be included in the day's calculation for leave credit.



Time and Attendance

Masters

Policies

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- Reports

Leave Credit Policy

Policy ID:

Policy Name:

Credit Mode: Fixed Credit Slab-Wise

Parameters Based on Attendance Behaviour

Previous Months to consider:

Payable Days Non-Payable Days

Only Presents:

Paid Leave:

All Absents

Only Un-Paid

Include in Calculation

Holidays: Week-Off:

Over-Time

OverTime Authorized OverTime

OT Hours for Half Day: Hrs

Slab-Wise Mapping

Presents From	Presents Upto	Credit Days	Presents From	Presents Upto	Credit Days
0	20	1.0	0	0	0.0
21	40	1.5	0	0	0.0
41	60	2.5	0	0	0.0
0	0	0.0	0	0	0.0

List New Edit Delete **Save** Cancel

Include in Calculation

Holidays: Week-Off:

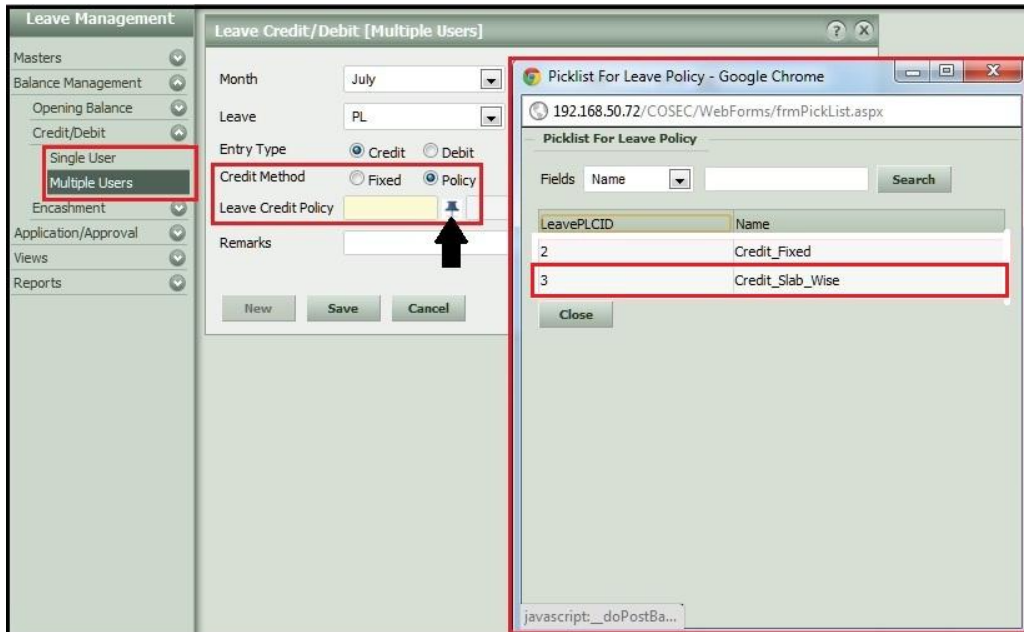
Over-Time

OverTime Authorized OverTime

OT Hours for Half Day: Hrs

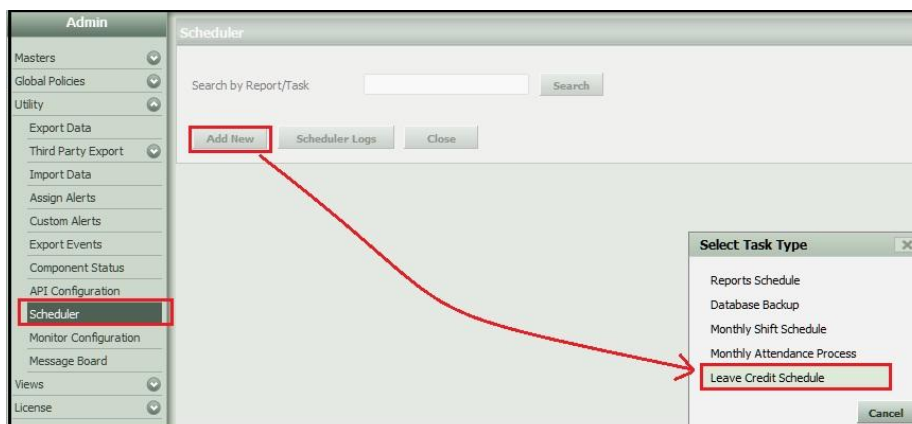
➔ In the event of enabling the Overtime option, specify the hours required for marking half day in the OT Hours for Half Day field.

On providing the user friendly name to the Policy, enabling/specifying the required options and Mapping the slabs appropriately, one can save the policy.

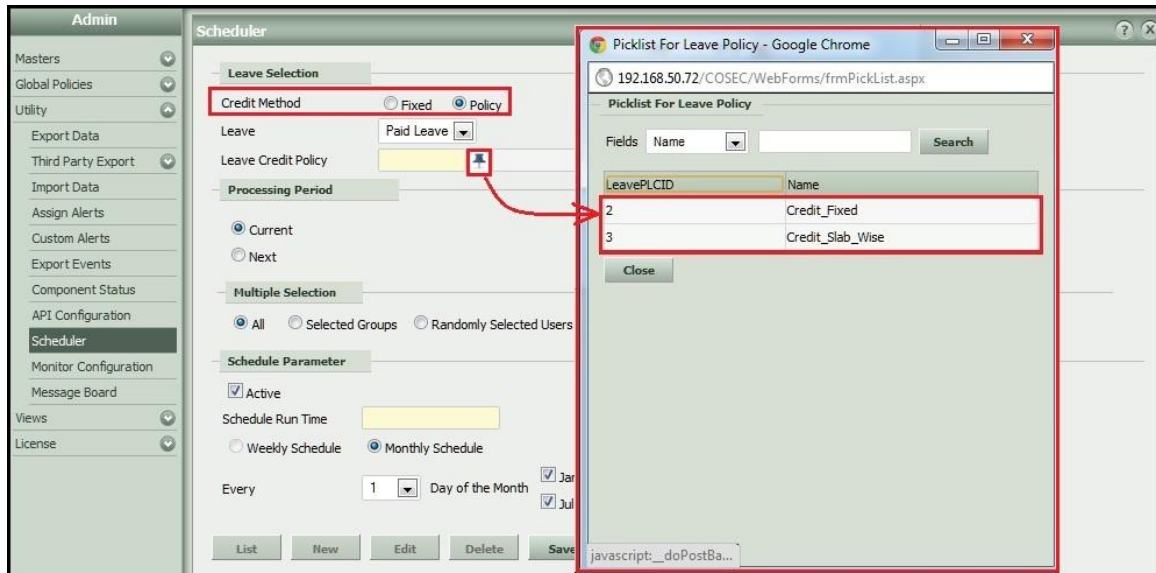


Selection of “**Credit method**” is provided for crediting leaves to the users. On selecting Credit method as Policy, on can browse the various policies defined through pick list. For e.g. select “Credit_Slab_Wise”.

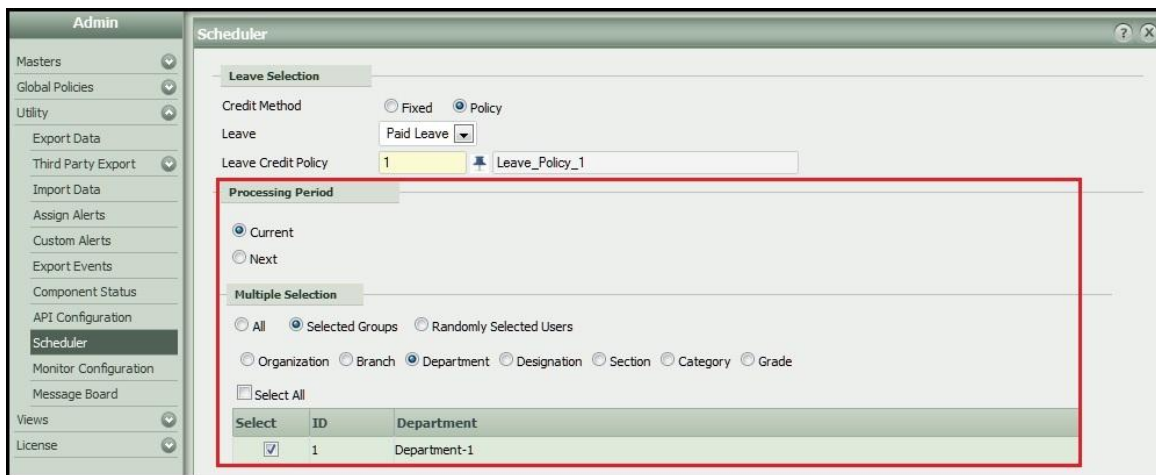
➔ **Schedule:**



To automate the crediting of leaves, one can define a scheduler named as “Leave Credit Schedule”.

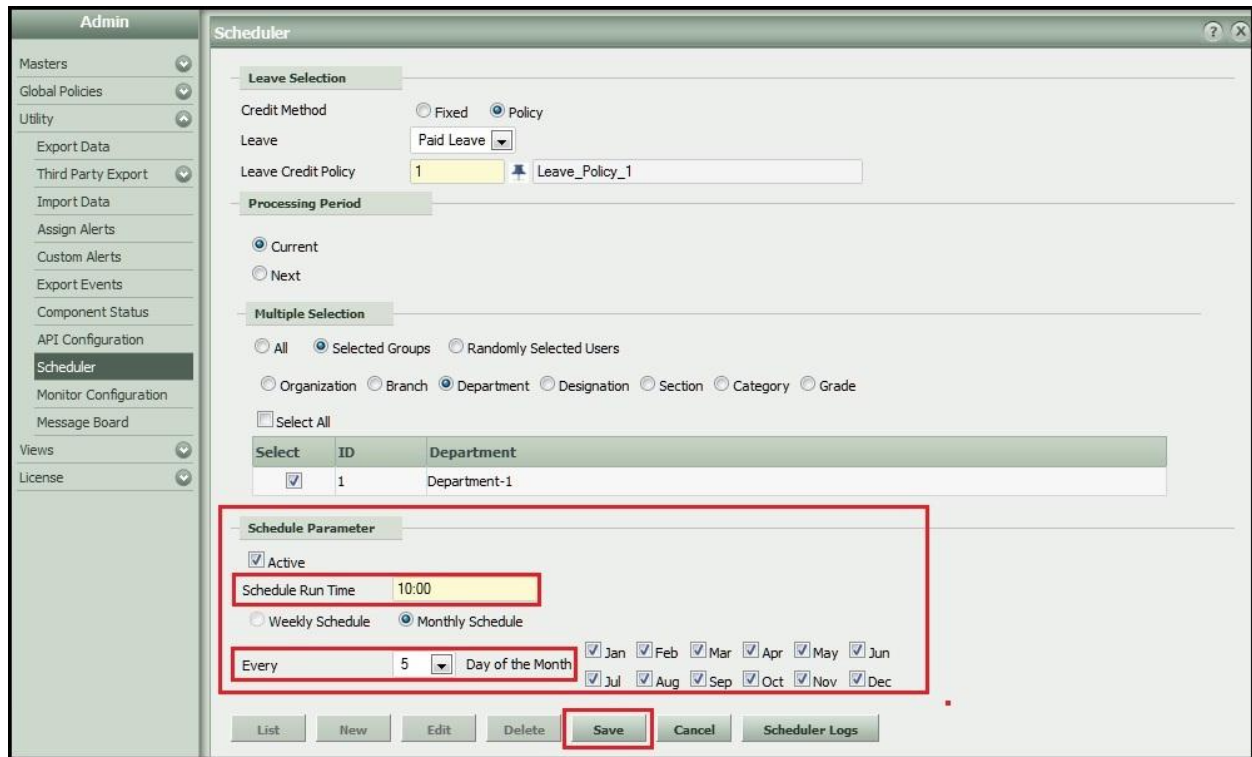


Specify the **Credit Method** as “Policy”. And select the Policy from the Pick list of **Leave Credit Policy**.



Processing Period: Specify the month for the processing whether Current month or the Next month.

Multiple Selection: This enables the administrator to filter the users based on the groups configured. The policy can be applied to the specific group of users.



Scheduler

Leave Selection

Credit Method: Fixed Policy

Leave: Paid Leave

Leave Credit Policy: 1 Leave_Policy_1

Processing Period

Current Next

Multiple Selection

All Selected Groups Randomly Selected Users

Organization Branch Department Designation Section Category Grade

Select All

Select	ID	Department
<input checked="" type="checkbox"/>	1	Department-1

Schedule Parameter

Active

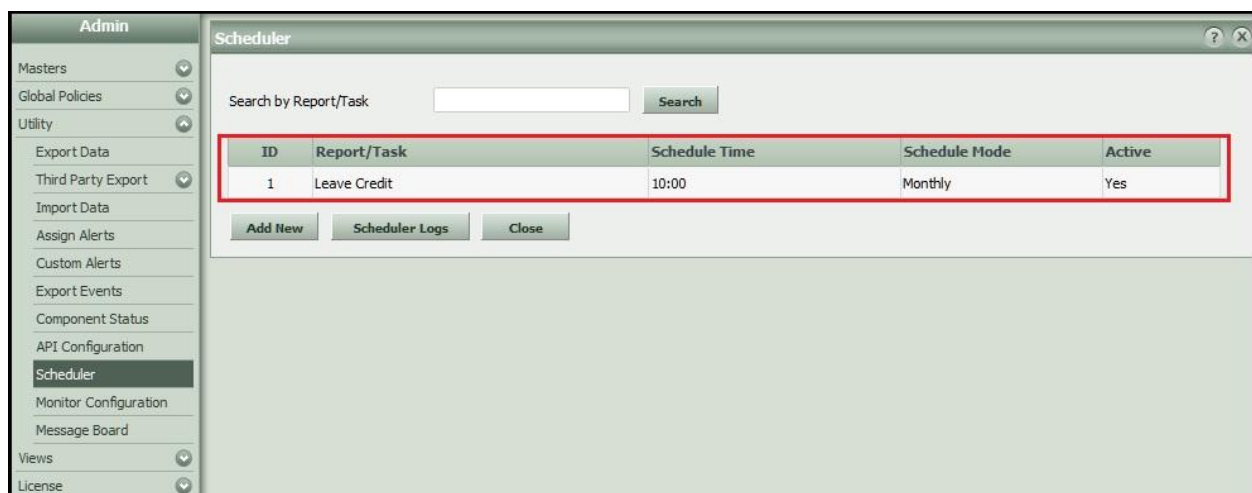
Schedule Run Time: 10:00

Weekly Schedule Monthly Schedule

Every 5 Day of the Month

Jan Feb Mar Apr May Jun
 Jul Aug Sep Oct Nov Dec

Schedule Parameters: Activate the scheduler. Specify the schedule Run Time at which schedule will be processed. Specify the day of the month. And select the number of months for which the scheduler should run.



Scheduler

Search by Report/Task:

ID	Report/Task	Schedule Time	Schedule Mode	Active
1	Leave Credit	10:00	Monthly	Yes

Note: Alert services should be running to trigger any schedule.



Thanks & Regards,

Technical Support Team – Security Product
Matrix ComSec, Vadodara, India
E-mail: support@MatrixComsec.com

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