



## *Easy Online Leave Management*

### **PlanMyLeave - Feature rich, automatic and easy to use**

PlanMyLeave is a specialized HRIS and leave management system with powerful functionality and settings that makes it very easy to set up and automate absence management. It is designed to work for companies of all sizes from 20 employees to 20,000 employees and more. We have set up and are familiar with leave policy settings of more than 24 countries and companies from different industries ranging from manufacturing, insurance, retail, finance, IT, accounting and health care domains. We extend all help to HR staff in migrating their existing HRIS and Leave Management system as well as to migrate from manual paper based or excel based systems to an automated, easy to use Planmyleave online and easily accessible system.

### **HR info Repository**

- Maintain employee contact info, address, contact numbers, emergency contact details, dependents, education history.
- Look up this info online any time anywhere in the world.
- Employees can update their latest addresses and emergency contact details online
- Maintain HR information and upload documents related to staff like passports, resume, educational certificates, appraisal forms etc.

### **Access, usage and mobility**

- Web based and can be used by staff working in office or remotely
- Scalable and can be set to work for companies of all sizes easily
- Access from anywhere in the world or can be restricted to office ip.
- Mobile version
- Company branding options
- Accurate and saves time and cost spent on HR and Administration
- Makes it easy for HR to track leave and run reports

### **Holidays and weekly offs**

- Set Company holidays and weekly days off - Holiday settings can be customized at location, department or even employee level.

## **Leave approval workflow**

- Automatic workflow of leave requests in preset approval paths.
- Up to 3 approvers in a leave approval path
- Attach leave approval paths at company, location, department or employee levels.
- Attach different approval paths for different leave types at the employee level. So sick leave can be set one approval path and Vacation can take another approval path.
- Auto approval can be set for Senior Staff with notifications to HR

## **Full day, quarter day, half day or in hours**

- Leave requests can be set to be applied for in full days, half days, quarter days.
- Planmyleave can also accept partial days by specifying start and end times.
- Employees can be put in different shifts and time-off will get automatically calculated based on their shift timings.
- Planmyleave allows flexible working hours and time-off requests that can be availed based on duration specified. Apply leave with duration in hours - like 2 hours without specifying start and end time.
- Leave calculation can be based on complex shift pattern settings

## **Calendars - Monthly, Team and Yearly calendars**

- View Monthly, current year, next year and previous year calendars of teams and users with filters for department, location etc.
- Team calendars to show only team members. Useful for resource planning

## **Automated leave entitlement and Carryovers**

- Automated leave policy rules can be set to come into effect x months/weeks/years after hire date.
- Leave accruals can be done in hours or days.
- Users can accrue balance by day, week, every x weeks, every x months, semi-monthly or every two weeks
- Secondary accruals can be set to happen in parallel - for example add an extra day for every year worked.
- Different policies can come into effect at different times of an employee's tenure - days/months or after years of completion.
- Accruals in hours/days can be calculated up to 4 decimals accuracy.
- Leave balances can be reset to 0 on leave start year or set to carry up to x days into the next year
- Also allows manual adjustments to leave balances to set current balances

## **Custom Settings of Leave types and policies**

- Leave types and policies can be assigned at employee, location or company level.
- When policies change in between earlier history of leaves are still available.
- Set Start date of the leave year as any day of the year like 1st July or 1st April. Defaults to Jan 1st.
- Leave types like Business trip and Training can also be set - for informational purpose to view employees availability
- Run Leave Balance engine to recalculate balances after leave policies are changed.

## **Company holidays and weekly off**

- While calculating leave duration for leave types you can decide if the intervening weekly offs and / or the Company holidays need to be included.
- Define different Company holidays for different locations / department or even at employee level.

## **Automatic email reminders**

- Set up to 3 automatic email reminders of upcoming leaves and company holidays and choose who it has to go to.
- Email templates can be set in your local language to be sent to staff for leave request and approvals as well as for important companywide notifications.

## **Roles and Permissions**

- Create access roles for staff with and restrict access to the staff they can view or manage. Managers can be assigned roles to see only staff reporting to them and Team leaders can be assigned to have access to the teams they lead. Department manager role can be created with permission to view/ edit or manage only those in their departments. Supervisors can be given permission to apply leave on behalf of the people they supervise.
- In companies where all levels of staff are not very familiar with using computers - it is useful to have the team lead or supervisor or HR Manager manage leaves of staff reporting to them

## **Set Watchers and interested parties**

- Watchers / interested parties are people who get copied on mails when leave requests are made and approved.
- Line managers, HR Staff, Department heads or team leads can be informed leave requests are made. Automatic email notifications can be triggered on request and/or approval

## **Calendars**

- Put people in teams and view team calendars in one click - individual or Team view
- View monthly calendars / yearly calendar of employees
- Shows availability of staff in teams, departments and locations visually - to help plan staffing
- Integrate calendars with Outlook, Google calendar and iCal
- Option for leave reason to be shown or suppressed on Outlook calendars.
- View employee birthdays and work anniversaries on the calendars

## **Multi- location and multi-language customization**

- Set date formats for each location
- Set custom leave types and policies
- Set custom holidays for each location / department.
- Form teams of employees from multiple locations to see team leave calendars
- Create leave type names in your own language (French, Spanish, Chinese, German etc)
- Create your email templates to go out in your own language when notification emails are sent.
- We can also translate Planmyleave to work in your local language with inputs from your end. Please contact us at [support@planmyleave.com](mailto:support@planmyleave.com) to know more.

## **Employee Self service dashboard**

- Display leave balances in hours or days
- Detailed view of how leave is accrued and used up when you click on a leave balance.
- Real time info of balances
- Apply leave online, get approved online and get notified online
- Reports of leaves, current balances, overtime
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## **Editing submitted / approved leave requests**

- Edit and resubmit requests even after they are approved in case your holiday plans change.
- This is a permission based setting that can be turned on or off.

## **View past leave approvals**

- View approvals you have done in the past.
- Search for leave requests by individuals or by leave request types and between date ranges

## **Clash alerts - and View who else is off at the same time**

- See who else is off at the same time when approving leave

- See past leave history while approving leave
- See company holidays while approving leave
- Can be set to show clash alerts - you can specify a warning if key people have applied for leave at the same time

### **Supporting Document Settings**

- Ask for supporting document (like a medical certificate) to be attached as a requirement if leave exceeds a certain number of days, or if the employee has applied for leave multiple times recently (for example 4 times in the past 2 months).
- Show supporting document requirement as a warning.

### **Auto approvals**

- Set "Auto approval" for leave requests of specific leave types or for specific employees.
- Employees with the right permission settings can make leave requests on behalf of other staff and also have them auto approved.

### **Notifications**

- Post company-wide, location-wide or team notifications on the dashboard.
- Get notified by email of upcoming holidays and reminders of leave of staff

### **Overtime and Time Banking**

- Record Overtime and set it to credit Time Off in Lieu / Compensatory off or any other leave type. Employees can use this time-bank taken from overtime or any other extra work done to compensate for time-off.
- Overtime worked can be credited or encashed with a multiplication factor - like 1.5 times normal time/pay.
- Overtime requests can follow a separate approval path
- Options to encash overtime or credit it to compensatory or Time off in lieu.

### **Log unrecorded Absences**

- If a person has not applied for leave and fails to turn up at work you can log their absence on Planmyleave. They will show as absent on the leave calendar and an email reminder will be sent to the absentee to put in a leave request for the date specified. When the request is put in the absence record will get automatically deleted or cancelled depending on the situation that caused the absence.

### **Reminders**

- Set alerts someone is going to be off on holiday /vacation. Up to 3 alerts can be set at different number of days before the leave start date.
- Set holiday reminder emails of upcoming holidays.

- View users on leave on your dashboard for the current date and for future dates.

### **Log late arrivals**

- Log Late Arrivals - you can specify how many minutes or hours a person has reported late for work.
- Useful in seeing habitual late comers.

### **Birthday and Anniversary reminders**

- Birthdays and work anniversaries can be viewed on team calendar
- You can set reminders to send notifications of upcoming birthdays and work anniversaries

### **Access Roles and permissions for users**

- Create different user roles and grant permissions to different sections of Planmyleave
- Create multiple roles like Department Heads, Team Leads, Supervisors, Country heads with different access permissions
- Very granular View, Edit and Delete permissions to different sections of the application can be given
- Comprehensive and granular permission settings for user roles.
- Users can have multiple roles

### **Set Restricted days**

- You can set Restricted days - to show a warning or avoid leave requests on key working days of the company (like month end or month beginning or important days)
- Set restricted day pattern with recurrences
- You can set restrictions on leave requests - to prevent key people from taking leave at the same time.
- Set maximum number of people who can take off at the same time in a team

### **Shifts and shift patterns**

- Set shifts, shift timings and shift patterns (user schedules) at employee level and view color coded shifts on calendar
- Set Work at home patterns and view on calendar
- Leave request calculations will be based on the shift settings for individual users.

## **Reports**

- Reports on Employee information, current leave balances, leaves taken, leave requests made, overtime requests, manual adjustments made all filterable by employee, locations, departments, job titles and hire types.
- Management reports can be downloaded in excel and PDF formats
- Summary or detailed reports for any and all leave types
- Report for full company, or particular departments/locations/hire types/job titles
- Report for custom periods or full year
- Set report filters (by period, staff, types...)

## **Security and Network security**

- Full security via SSL encrypted data
- Offline access restriction
- Hosted on secure Amazon Web Servers with load balancing, replication, security and automatic back ups
- IP restrictions can be set to allow logins only from selected ips or range of addresses

## **Integration with ERP and other systems like biometric access control systems**

- Integration with your company's ERP, HR and Payroll systems
- Calendar synchronisation, Microsoft Outlook , Google iCal
- Single sign on with Gmail and Yahoo
- Reporting integration with Microsoft Excel
- Mobile version with access on mobiles and tablets and multiple operating systems and browsers
- Can be integrated with other biometric attendance systems

## **Our upcoming HR and ERP Tools**

We have launched our project management tool ProjectToolBelt early 2015. We are coming out with 360 degree feedback employee appraisal, timesheets, CRM and scheduling applications that will all be fully integrated with Planmyleave HRIS.

## **Support and Training**

We extend full support with set up and implementation of Planmyleave and also give ongoing support via phone, email and chat.

We also train the administrators on day to day use of the system and set up.

## **Custom branding options**

We can set up the leave management system with your company logo and colors to make it look exclusively like your own system with minimal Planmyleave branding. The emails can also be made to originate from your company email. Please contact us at [support@planmyleave.com](mailto:support@planmyleave.com) for more details.

## **Planmyleave - Benefits**

### **Company Benefits**

- Save up to 36% of your payroll costs by managing absences and controlling the direct and indirect costs associated.
- Save more than 80% of management and employee time spent on leave approvals, requests, follow-ups, and leave balance calculations.
- Save on HR time and costs spent on maintaining leave balances, calculations and answering employee disputes.
- Save unnecessary back and forth conversation between staff and supervisors to get leave approved
- Curtail unexcused absences and taking days off work without permission.
- Everything is online through a secure cloud based system accessible both at home and in the office and anywhere in the world.
- Cut costs further with a fast return on investment as unauthorized absences will plummet.
- Improved productivity and efficiency all around the business.
- HR staff can be much more productive as absences are no longer the big problem they once were.
- Save on paper as everything is carried out on online.
- Maintain your Company HR Leave policy easily and make it clear to all stakeholders on the system
- Viewing team calendars helps managers plan resource availability easily
- Mobile app helps managers and employees save time.

### **Employee Benefits**

- Makes it much easier for staff to request leave that they need, and also keep a check on leave balances.
- Get leave requests handled online - no more time consuming meetings with management to see if you can get time off.
- Schedule absence and other leaves ahead of time with ease and by correlating with other members of the company.
- Keep your emergency contact information and address updated on self service dashboard to be contacted for any emergencies.
- View your leave balances online and see your reports online without unnecessary questioning of HR Personnel.
- Employees can update their contact, photo and personal information online easily



## Employer Benefits

- Create a better relationship with your staff as they can stay focused on the job without having to push paper and follow up emails.
- Reduce human error when it comes to calculations of balances by HR and IT departments.
- Company notifications can be posted and viewed on the dashboard for any announcements.
- View entire employee information from one centralized dashboard.
- Easy visibility of availability of staff at any time of year, making management much easier in general.
- Team calendars allows you to plan for absences better to make sure your absence is covered.

## Reporting Benefits

- Reports are exportable in excel and PDF and show clear information on user details, leave balances, and leaves taken, manual adjustments, overtime and holiday lists for locations. Automated reports can be sent at preset intervals.
- Easy to check dashboard shows all users off on leave or absent - making it much easier to find out numbers of staff on leave
- Simple to correlate calendar makes it easier to check out absence of team members to plan for absence coverage

## Software Benefits

- All employee and approver transactions are handled online with Planmyleave
- Flexible and easy to use, allows for simple and multiple assignments of leave types and policies.
- Import & export data to other HR and Payroll systems.
- 100% secure and scalable. Hosted on Amazon Web Services with high security of data.
- Total transparency over the process - no more unnecessary questioning and disputes with HR Staff.
- Lessens unauthorized absence for the long-term.

## Integration with other HR and ERP tools

We are coming out with Timesheets, Web Expenses, CRM and Scheduling applications and Planmyleave will be fully integrated with all applications. Our comprehensive project management tool ProjectToolBelt can be integrated free of cost with Planmyleave. Please contact us at [support@planmyleave.com](mailto:support@planmyleave.com) to get it activated for your account.