

# Overview Video

[https://www.youtube.com/embed/NyDJeTX\\_330](https://www.youtube.com/embed/NyDJeTX_330)

## Step-by-Step Tutorial Guide

### Overview

This tutorial explains how to configure and manage the Leave Management module in TankhaPay. The video covers:

- Accessing Leave Management
- Creating Leave Templates
- Configuring Leave Types
- Setting Restrictions & Policies
- Managing General Settings
- Configuring Holidays
- Managing Leave Types
- Bulk Comp-Off Opening Balance Upload

## Step 1: Open the Leave Management Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **Leave Management**.
3. Click on **Leave Management** to expand the menu.
4. You will see the following options:
  - Leave Templates

- General Settings
- Holiday Settings
- Leave Type
- Bulk Comp-Off Open Balance

This section allows HR teams to configure the complete leave structure for employees.

# Step 2: Access Leave Templates

1. Click on **Leave Templates** from the Leave Management menu.
2. The system displays existing leave templates.
3. Each template card contains:
  - Weekly off configuration
  - Leave calendar year
  - Attendance approval requirement
4. You can:
  - View a template
  - Set a template as default
  - Create a new template

# Step 3: Create a New Leave Template

1. Click on **Create a New Template**.
2. Enter the **Template Name**.
3. Configure the weekly off settings:
  - Select working and off days for each week.
  - Mark weekly offs for:
    - Sunday
    - Monday
    - Tuesday
    - Wednesday
    - Thursday
    - Friday
    - Saturday

4. Configure the pattern week-wise if required.

This helps organizations create custom leave calendars for different employee groups.

# Step 4: Configure Leave Types

Inside the template setup page:

1. Navigate to the **Types of Leaves** section.
2. Select the leave code from the dropdown.
3. Configure:
  - Number of leave days
  - Carry forward option
  - Accumulation rules
  - Maximum limit
  - Effective after period
4. Click **Add** to save the leave type.

Available leave categories may include:

- Privileged Leave (PL)
- Sick Leave (SL)
- Casual Leave (CL)
- Earned Leave (EL)
- Compensatory Off (CO)
- Restricted Holiday (RH)
- Leave Without Pay (LWP)

# Step 5: Configure Carry Forward Rules

1. In the carry forward dropdown, select the required rule.
2. Available options may include:
  - Monthly
  - Quarterly

- Half Yearly
  - Yearly
3. Define accumulation and maximum carry-forward limits.

This configuration controls how unused leave balances are transferred.

# Step 6: Configure Leave Restrictions

Scroll to the **Restrictions** section.

Configure the following rules:

## Leave Balance Rules

- Allow or restrict leave application when balance is exceeded.
- Define whether leave can be taken as:
  - Full Day
  - Half Day

## Request Rules

- Allow requests for:
  - Past dates
  - Future dates

## Application Limits

Set limits for:

- Minimum leaves per application
- Maximum leaves per application
- Minimum gap between applications
- Probation period restrictions

- Number of applications within a specific period

These rules help organizations standardize leave policies.

# Step 7: Configure Week-Off Absence Policy

Under the **Week Off Absent Policy** section:

1. Define whether weekly offs should be counted as absent.
2. Configure conditions such as:
  - Consecutive leave before and after weekly off
  - Weekends marked absent after missed working days

This ensures attendance calculations follow company policy.

# Step 8: Configure General Settings

1. From the left menu, click **General Settings**.
2. Configure Comp-Off related settings.
3. Available configurations include:
  - Enable/Disable Comp-Off
  - Comp-Off applicability
  - Validity period
  - Maximum allowed leaves
  - Required working hours
  - Expiry duration
4. Save the settings after configuration.

These settings define how compensatory offs are handled across the organization.

# Step 9: Configure Organization Holidays

1. Click on **Holiday Settings**.
2. The holiday list page will open.
3. Select the year.
4. You can:
  - Add new holidays
  - Map holidays to employees
  - Sync holidays to employees
5. The holiday table displays:
  - Holiday date
  - Holiday name
  - Status
  - State/organization unit
  - Created date

This allows centralized holiday management for the organization.

# Step 10: Configure Leave Types Master List

1. Open **Leave Type** from the menu.
2. View all available leave categories.
3. Enable or disable leave types as required.
4. Configure applicability for:
  - Male employees
  - Female employees
  - Specific employee categories
5. Edit leave type settings when required.

This section controls which leave types are active in the system.

# Step 11: Bulk Upload Comp-Off Opening Balance

1. Click on **Bulk Comp-Off Open Balance**.
2. Select the required year.
3. Download the sample template.
4. Fill employee comp-off balance data in the sheet.
5. Upload the completed file.
6. Click the upload button to import data.

This feature helps HR teams upload opening balances for multiple employees at once.

## Key Benefits of the Leave Management Module

- Centralized leave configuration
- Flexible leave policy setup
- Automated leave calculations
- Weekly off and holiday management
- Carry-forward and accumulation control
- Bulk leave balance uploads
- Improved HR compliance and tracking

## End of Tutorial

You have now completed the Leave Management setup walkthrough in TankhaPay.

This module helps organizations efficiently manage employee leave policies, holidays, attendance-linked rules, and compensatory off settings from a centralized dashboard.

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