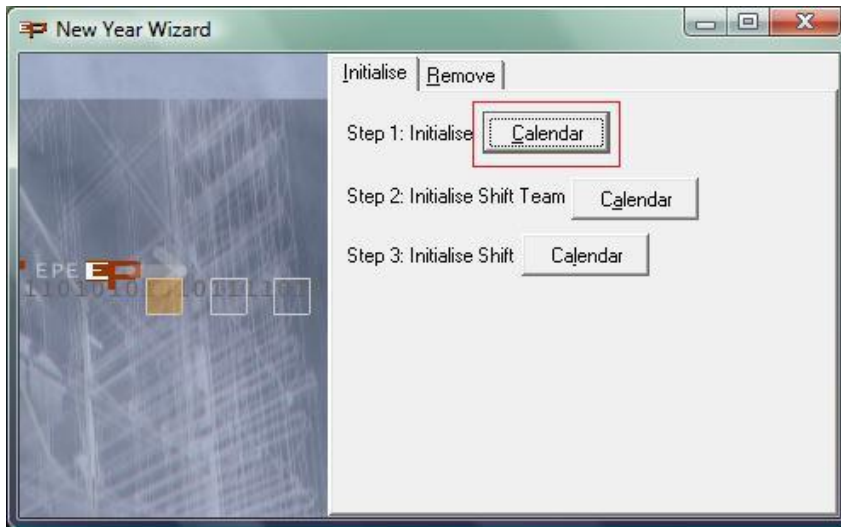


Steps to Initialize 2018 Calendar & 2018 Leave

1. Initialise 2018 Calendar

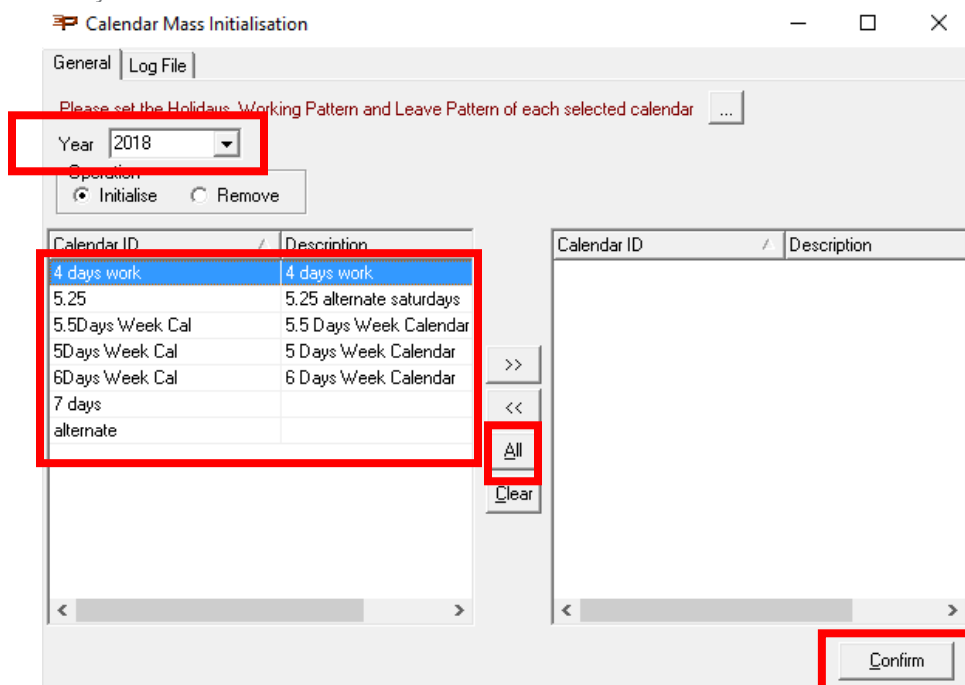
1.1 Go to Core module → Setup → Initialise New Year Setup

1.2 Click the Calendar button at Step 1:

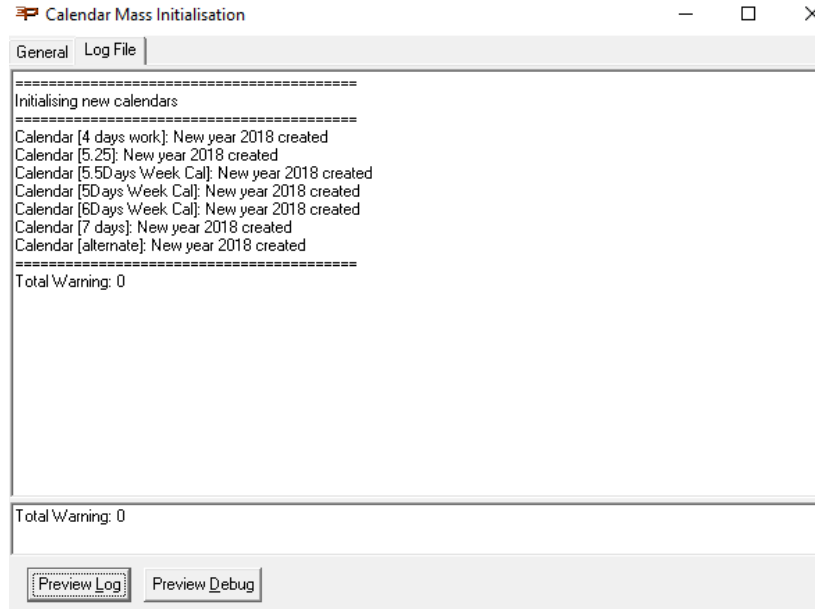


1.3 Select Year 2017 from the dropdown menu → choose Operation = Initialise

→ select the Calendar ID you wish to initialise and move to the right → click Confirm → Are you sure? = Yes



1.4 Initialisation to 2017 is complete and you may go to Calendar Setup to verify.

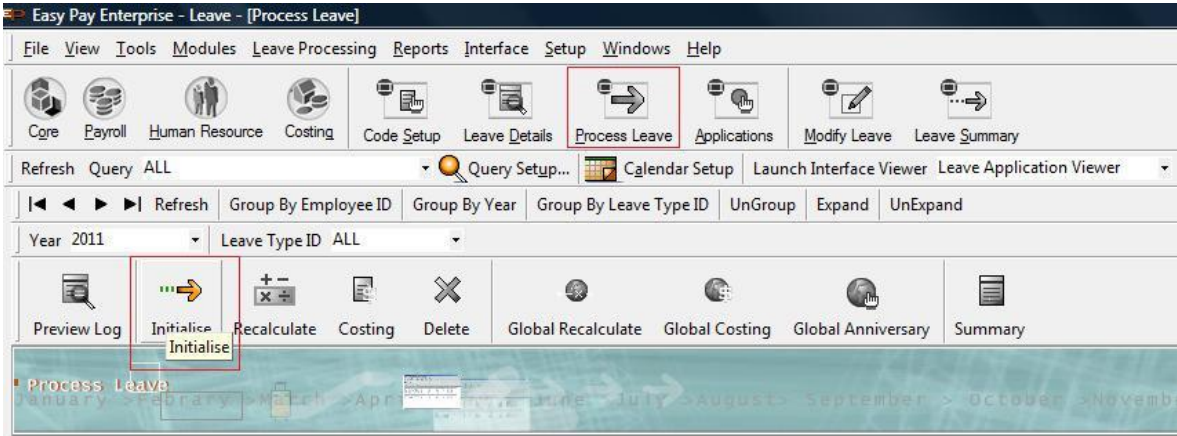


Year 2018

	1	2	3	4	5	6	7	8
Jan	P	F	F	O	O	O	F	F

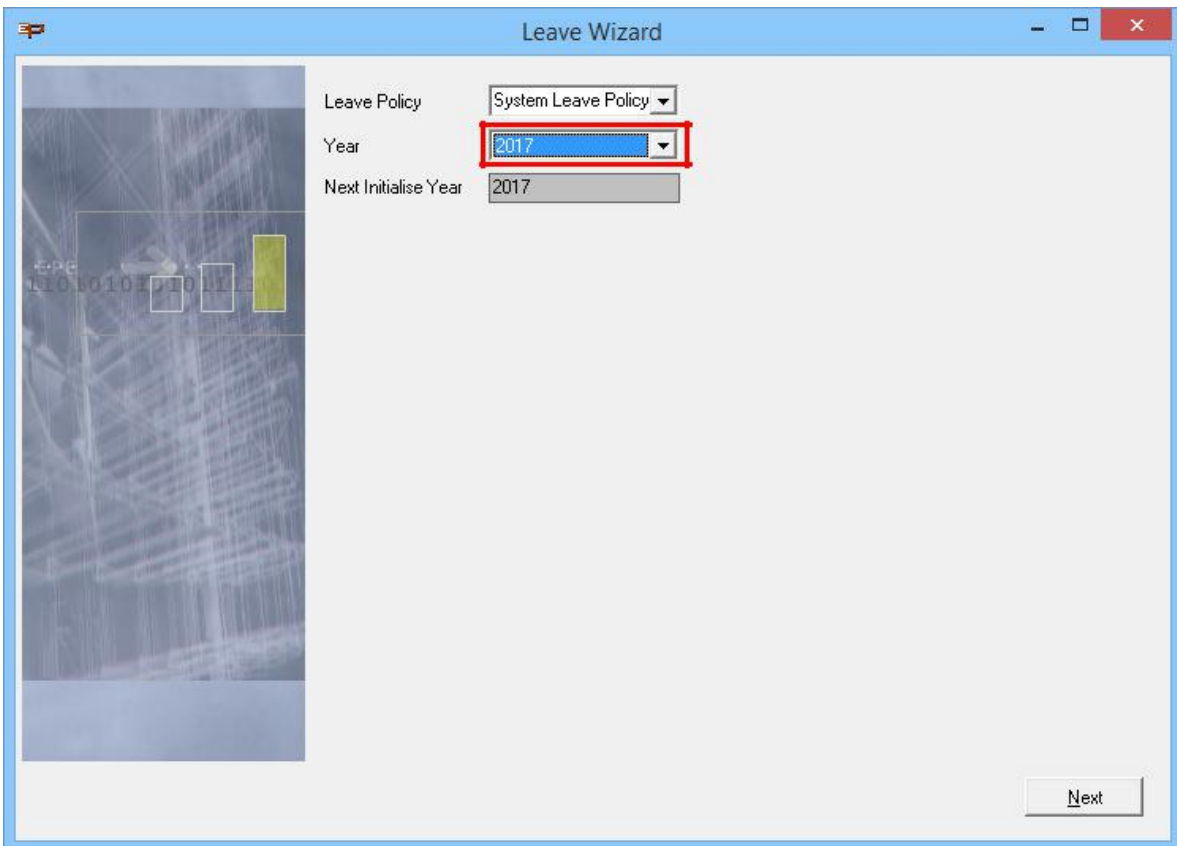
2. Initialise 2018 Leave (To those who have Leave Module)

2.1 Go to Leave module → Process Leave → click on Initialise



2.2 Select the appropriate Leave Policy → Year = 2018 → click Next

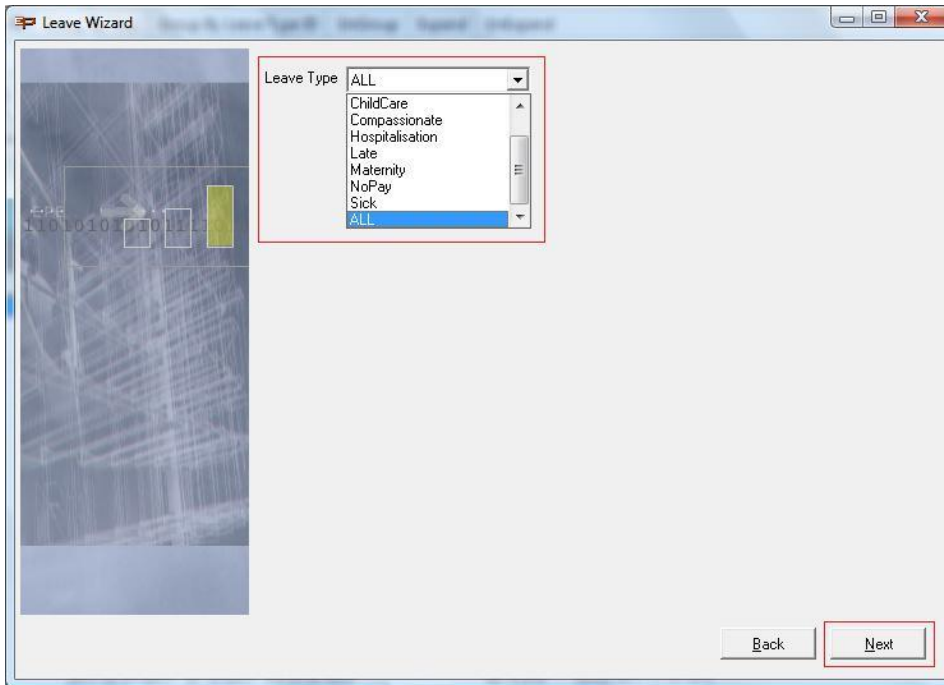
Note: It is possible that Next Initialise Year may not reflect 2018; kindly disregard for the mean time as this is a work in progress



a

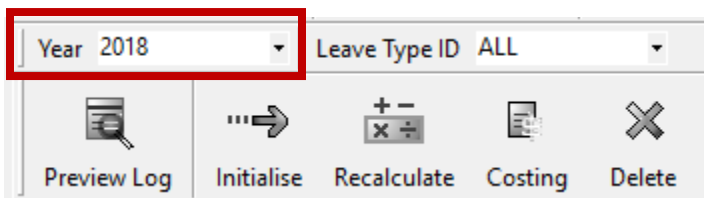
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2.3 Select ALL or any particular Leave Type → Next



2.4 Select Employees to initialize for 2018 → move to the right → click Confirm

2.5 Click Process Leave → select Year 2018 and you should be able to see those leave records that have been successfully initialized for year 2018. Also, employees may now apply leaves for 2018.



Additional steps for ePortal Users

Note: Staff may already apply 2018 leaves upon log in; however, do take note that 2017 Leave Balance would still be shown under My Home.

Staff will only see 2018 Leave Entitlements when the ePortal server date and time changes to 2018.

Also, leave cannot be applied cross over the period, e.g. 26 December 2017 to 5 January 2018.

For ePortal V2 (ePortal version 10.6.8.31 onwards)

Login as ADMIN → go to Settings → go to eLeave Settings → Configuration → Copy all leave type from EPE? = Copy → Confirm copy leave types? = OK

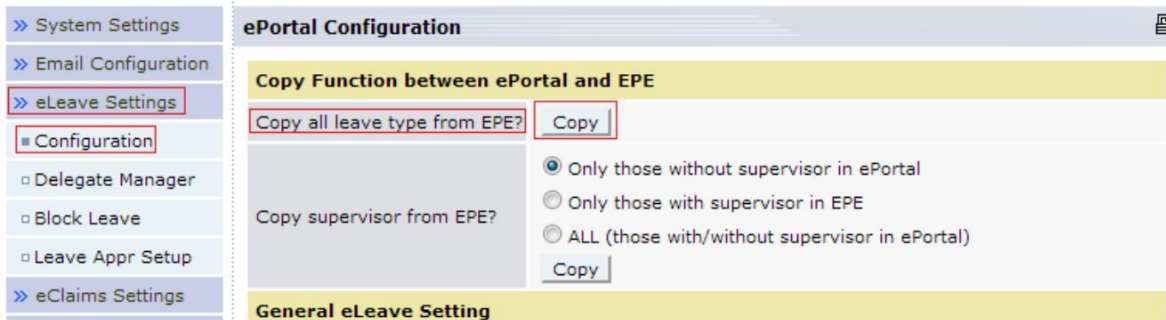
Note: No need to click on Submit at the bottom of the page.

The screenshot shows the Sage EasyPay ePortal interface. At the top, there are navigation tabs for 'Process', 'HR Management', and 'Settings'. The 'Settings' tab is selected and expanded, showing a list of options: System Settings, Email Configuration, eRecruitment Config, eLeave Settings, and eClaims Settings. The 'eLeave Settings' option is highlighted, and a sub-menu is open, showing options: Delegate Manager, Block Leave, Leave Notice, Leave Appr Setup, Consecutive Config, and Configuration. The 'Configuration' option is highlighted. Below the navigation, the 'ePortal Configuration' page is visible. It has a section titled 'Copy Function between ePortal and EPE'. Under this section, there is a checkbox labeled 'Copy all leave type from EPE?' which is checked. To the right of this checkbox is a green 'Copy' button. Below this, there is another section 'Copy supervisor from EPE?' with three radio button options: 'Only those without supervisor in ePortal' (selected), 'Only those with supervisor in EPE', and 'ALL (those with/without supervisor in ePortal)'. A green 'Copy' button is located below these options.

For ePortal V1 (ePortal version 10.x.x from the login screen):

Login as ADMIN → go to eLeave Settings → Configuration → Copy all leave type from EPE? = Copy
→ Confirm copy leave types? = OK

Note: No need to click on Submit at the bottom of the page.



Thank you for using Sage EasyPay!