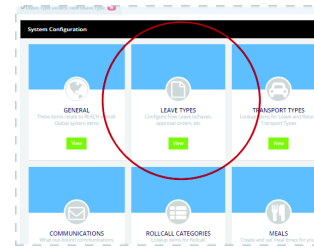


# CREATING A LEAVE TYPE

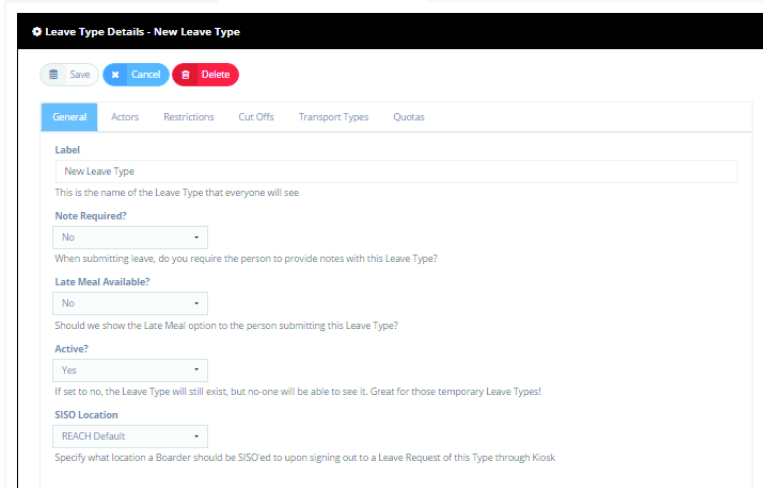
To create a new Leave Type go to System Configuration >> Leave Types

This will open the Leave Type configuration table where you can configure the details of the Leave Type to meet your requirements.



There are five components that require configuration when new Leave Type.

1. **General Settings**
2. **Set the Permissions Workflow and Actors involved**
3. **Set Leave Restrictions**
4. **Set Leave Cut-Offs**
5. **Set Leave Quota reporting**



## 1. General Settings

These are the general features of the Leave Type:

<b>Label</b>	Is the name given to your Leave Type
<b>Note Required</b>	Determines whether notes are compulsory with the leave request or not. If set to be compulsory, the student will not be able to submit the leave request without a note being provided.
<b>Late Meal Available</b>	Determines whether notes are compulsory with the leave request or not. If set to be compulsory, the student will not be able to submit the leave request without a note being provided.
<b>Active</b>	Determines whether the Late Meal request flag appears in the leave request form for the student to select.
<b>SISO Location</b>	Is the Leave Type currently active or dormant. Leave Types can be hidden from the selections when not in use.

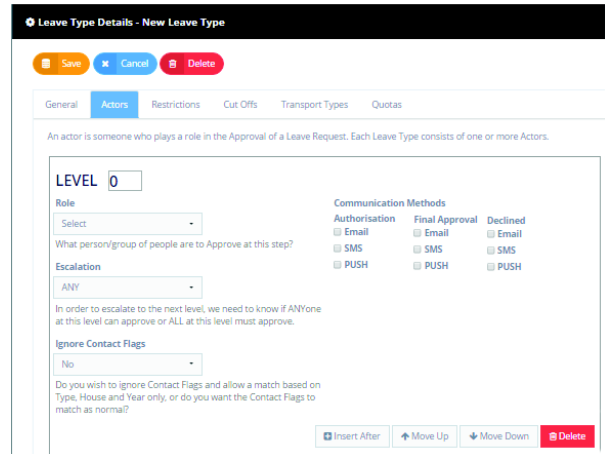
## 2. Actors & Permission Workflow

You need to set who is involved in the Leave Request permissions workflow, in what order they will participate and how they will be notified of the leave details. You have the flexibility to include any number of people into each Leave Type.

**IMPORTANT**

An important first step is to ensure that the Roles of any participants that you want to include in your leave permission workflow already exist in REACH. If you have a particular, unique leave type that requires a customised permission workflow then you may need to create a new user role in REACH to accommodate the permission workflow that you are attempting to build.

We call the participants in the leave permission workflow Actors because they are required to act upon the leave request that is being generated. Actor participation is set by User Roles in REACH.



For each Actor (Role) that you want to include in the permission workflow you need to set the following criteria;

<b>Level</b>	In what sequence will this Actor be required to participate in the leave permission. Level 1 is first, followed by Level 2. You can have an unlimited number of levels. You can also set multiple different roles to the same level (eg: Parents and Hosts are different roles so need to be added separately however they can both be set to the same level).
<b>Role</b>	What is the User Role in REACH for the Actor that you want to include.
<b>Escalation</b>	What is required for this to escalate to the next level? Any one of the role type (eg: parent) to take action or do you require action from all of the actors?
<b>Ignore Contact Flags</b>	Contact Flags will override your Grade and Dorm settings for who gets notified for any particular student. You can turn the contact flags off for this Leave Type is you wish.
<b>Communication Methods</b>	How do you want this Actor to be notified for each of the major checkpoints for the leave workflow. Authorisation means the Request for Authorisation when the leave request is submitted. Final Approval status is achieved only after the final Actor has Approved the leave request. Declined status can occur at any stage in the permissions workflow by any Actor.

Here is a sample workflow for five Actors across 4 permission steps.



**IMPORTANT**

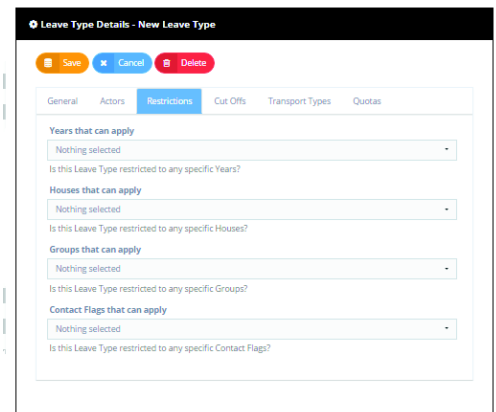
Notifications at higher levels are only received when the previous level activities are completed. In this example, House Advisor is only notified about the elave event when the parents and Host have approved or declined their notification.

It is only the notification that follow the sequence. The leave event will be available for viewing and actioning by staff on the Manage Leave dashboard as soon as it is created.

### 3. Set Leave Restrictions

You can restrict your Leave Type to any collection of students by configuring your restrictions fields.

Note that your selections are **mutually inclusive** meaning that if you select Year 9 and Dorm X then only students that are Year 9 **and** Dorm X will be able to apply.



<b>Year/Grade</b>	Select the Year groups that you would like to restrict this leave type to.
<b>House/Dorm</b>	Select the Dorm groups that you would like to restrict this leave type to.
<b>Student Groups</b>	Select the Student Groups that you would like to restrict this leave type to.
<b>Contact Flags</b>	Select the Contact Flags that you would like to restrict this leave type to.

### 4. Set Leave Cut-Offs

You can set Cut-Off times for your Leave Type that help you to manage when students can apply for the leave.

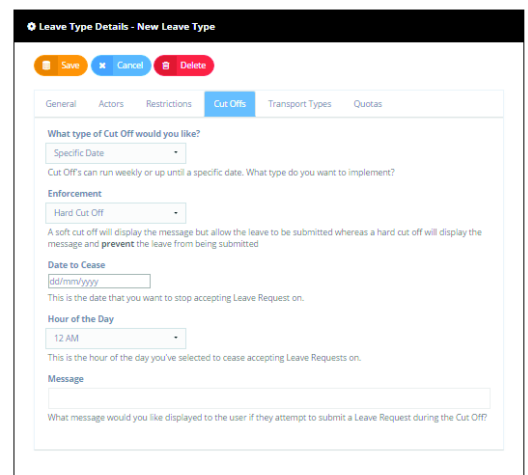
Cut-Offs can be Soft or Hard. Both settings will provide a custom message at the time of submission. A **SOFT** Cut-Off will allow the leave to still be submitted if the cut-off time is passed. A **HARD** Cut-Off will not allow the leave to be submitted if the cut-off time is passed.

Cut-Offs can be set to expire on a set date or to run on a weekly cycle.

#### Setting a Cut-Off by Specific Date

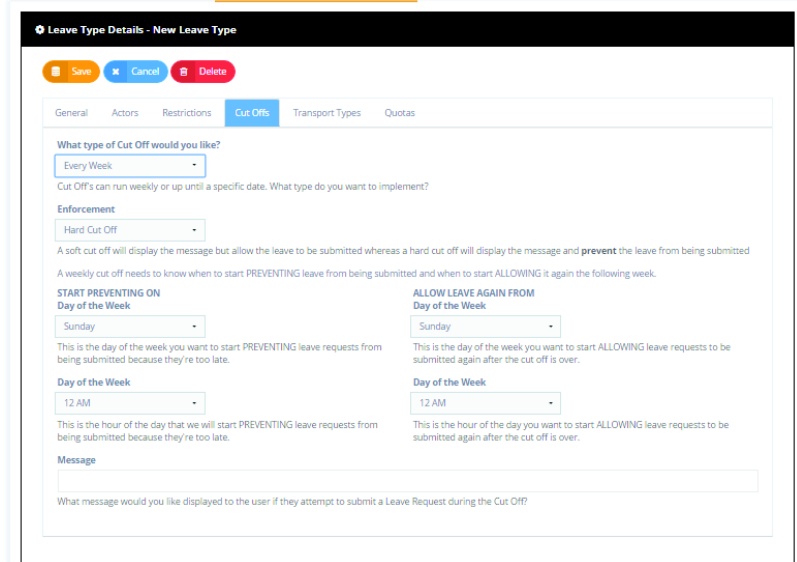
Specific Date Cut-Offs are ideal for special events or holidays that require leave to be submitted by a particular closure date.

<b>Enforcement</b>	Hard Cut-Off or Soft Cut-Off.
<b>Date &amp; Time</b>	Set the Data and Time to Close the Leave Type availability.
<b>Message</b>	Set your Custom Message that Students or Parents will see when submitting this leave request. The Message only shows when the Cut-Off is breached.



## Setting a Cut-Off by Weekly Cycle

You can set a regular weekly cycle cut-off for your leave types to help you manage the submission and approvals process for your most common leave events.



<b>Enforcement</b>	Hard Cut-Off or Soft Cut-Off.
<b>Start Preventing</b>	The Day and Time of every week that your leave type to close and become unavailable to be selected.
<b>Allow From Again</b>	The Day and Time of every week that you want your Leave Type to become available for selection again.
<b>Message</b>	Set your Custom Message that Students or Parents will see when submitting this leave request. The Message only shows when the Cut-Off is breached.

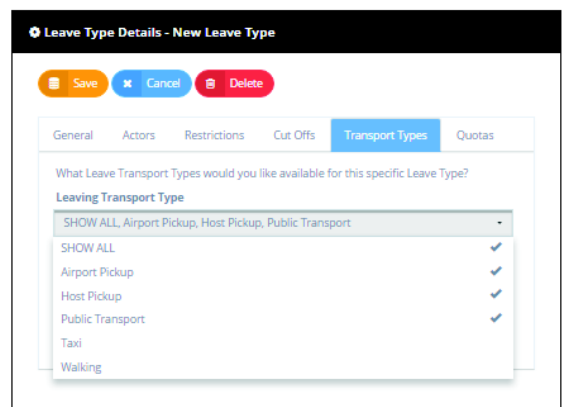


Your Leave Type will not be displayed as an option for select in the period between prevention and allowance.

## 4. Set your Leave Transport Types

You can determine the Transport Types that available to select for each Leave Type in this setting.

You can Show All or select any combination of your existing Transport Types to display for both departure and return for the leave request.

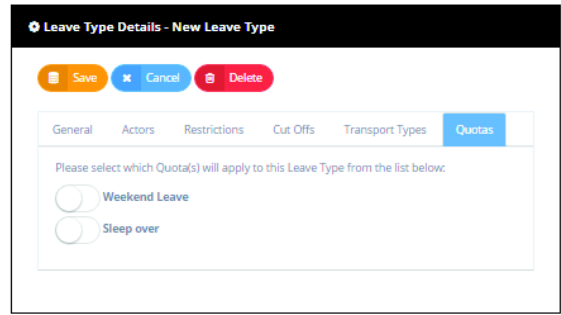


## 5. Set Quotas that this Leave applies to

Quotas are available for all leave events.

It is possible for more than one Leave Type to count towards any particular quota that has been set.

This setting allows you to determine if your Leave Type should count towards any Quota that has been set in your system. You will see all of your existing Quotas in this field and you can set your Leave Type to any one or more Quotas.



The screenshot shows a web interface for configuring a new leave type. At the top, there are three buttons: 'Save' (orange), 'Cancel' (blue), and 'Delete' (red). Below these are several tabs: 'General', 'Actors', 'Restrictions', 'Cut Offs', 'Transport Types', and 'Quotas' (which is currently selected). The main content area under the 'Quotas' tab contains the instruction 'Please select which Quota(s) will apply to this Leave Type from the list below:' followed by two radio button options: 'Weekend Leave' and 'Sleep over'. Both radio buttons are currently unselected.

**IMPORTANT**

Quotas are set and their consequences determined in System Configuration >> Quotas. Your Leave Type configuration allows you to allocate a leave event to count towards any particular quota. You can have more than one leave event count towards the same quota.