## Web Self Service -History Leave Transactions



Employees will be able to view current submitted and history leave transactions. Click on the **Leave** option on the navigation bar and then the **History** option.

sage	300 People					≓ Sage 300 People	📑 7 👗 Weicome Mr	Steven Spielberg 👻	Working as Mr Steven	Spielberg 👻	
Home	Leave - Claims - My Details - Paysle	os Reports Free Text Workflow F	Performance 👻 I	Development Plans 👻	Job Requisition	Tax Certificates					
	Apply Leave in Lieu Balances		_							Edit La	ayout
ŀ	History perg	My Payslips Latest payslip 31 January 2019	My Leaw 6	Submitted Items Ve Claims 0		Total emp	loyee leave submitted	for last 365 days			
		Latest tax certificate	Steve Kate Jenni	en Spielberg Hudson ☆ iffer Gamer	06 Jul 02 Aug 22 Aug			No data			
•	View Inbox										
+	New Leave Application										
+	Submit Claim	🛗 Today 🍽 🗸	+	Novem	ber 2018	<b>&gt;</b>	1	📽 🋗 Year 🛗 Mon	th 🛗 Week		
ත	View Payslips	Sunday	Monday	Tuesday	v	Vednesday	Thursday	Friday	Saturo	lay	
		28	29		30	31	1		2	3	

The History Transaction screen displays all history transactions already processed and all new leave transactions still awaiting final approval. These transactions will be sorted by latest transaction first.

Home L	Leave 👻 My Deta	aiis <del>-</del> Payslips R	teports Tax Certific	ates								
Co	mpleted Le	eave Items										
Drag a column	header and drop it h	ere to group by that colur	nn									
	Leave type	<ul> <li>Reference Nu</li> </ul>	<ul> <li>From Date</li> </ul>	<ul> <li>To Date</li> </ul>	<ul> <li>Units Taken</li> </ul>	<ul> <li>Leave reason</li> </ul>	<ul> <li>Note Received</li> </ul>	<ul> <li>Takeon Trans</li> </ul>	V Date Submitted	<ul> <li>Date Approved</li> </ul>	<ul> <li>Final Approver</li> </ul>	~
Cancel	Annual Leave	371319	26 Oct 2018	26 Oct 2018	1.0000	Annual Leave						
Cancel	Annual Leave	371385	07 Sep 2018	07 Sep 2018	1.0000	Annual Leave						
H 4 1 1												1 - 2 of 2 items
Lea	ave Items	In Progress										
Drag a column	header and drop it h	ere to group by that colun	nn									
	Leave type	<ul> <li>Reference Nu</li> </ul>	<ul> <li>From Date</li> </ul>	<ul> <li>To Date</li> </ul>	<ul> <li>Units Taken</li> </ul>	<ul> <li>Leave reason</li> </ul>	<ul> <li>Note Received</li> </ul>	<ul> <li>Takeon Trans</li> </ul>	<ul> <li>Date Submitted</li> </ul>	<ul> <li>Date Approved</li> </ul>	<ul> <li>Final Approver</li> </ul>	~
Cancel	Annual Leave	E071100-T0047- N00001	12 Dec 2018	19 Dec 2018	5.0000	Annual Leave			13 Nov 2018			
H + 1 1	<b>1</b>											1 - 1 of 1 items

The Completed Leave Items section will display all processed leave transactions.

	Со	mpleted Lea	ive Items										
	Drag a column	header and drop it here	to group by that column										
		Leave type 🗸 🗸	Reference Nu ~	From Date ~	To Date 🗸 🗸	Units Taken 🗸	Leave reason V	Note Received ~	Takeon Trans 🗸	Date Submitted V	Date Approved V	Final Approver 🗸 🗸	
Γ	Cancel	Annual Leave	371319	26 Oct 2018	26 Oct 2018	1.0000	Annual Leave						
	Cancel	Annual Leave	371385	07 Sep 2018	07 Sep 2018	1.0000	Annual Leave						
	н н 1 1	P H										1-	2 of 2 items

You can click on the **Cancel** button to cancel a leave transaction that has been processed to the system.

A message will be displayed that prompts you to acknowledge that you want to cancel the transaction.

8	Are you sure you want to can	cel this Transacti	on?
		No	Yes

Select **Yes** to cancel the transaction.

Once the cancelled leave transaction has been approved, it will be posted to the Sage 300 People system and the leave balances will be recalculated accordingly. Both the original transaction as well as the new cancelled transaction will be listed here once approved. The cancelled transaction will display the original units as a negative value. Should the Cancel button not be available, it means that the transaction was cancelled already or there is no Process Definition set up in Sage 300 People to allow the user to Cancel the transaction.

Navigation #	Employees Leave Detail					
Navigation 🙀 Recentl 📴 Content	- Employee RSA001 - Mrs Q Latifah	¥	Termination Date 2018/	12/31	*	🤶 FBZERO - Fringe B
An Entity Management	No image data Employee Status A - Active		Date Engaged 2018/	05/01	•	
Company Management v	Active Leave Policy STANDARD - Standard					
Generic Tax 🗸 🗸	Employee Leave Transactions Leave Calendar Leave in Lieu					
Lemployee Management ^	🔞 🔕 Record 3 of 9 🔕 🔯 📮 🍃 💥 🤭 🔚					
Employees						
History Payslips	Leave Type From Date A To Date Units Taken Leave Reason Comment Reference	Number Note Received Ta	keon Transaction Payslip Tr	ansaction Process Status From	То	Apply selection t
🗞 Recruits	RSA_LEAVE 2017/11/09 2017/11/09 1.0000 E000008-	T0006		PROC - Proc		
Employee Transfer	RSA_LEAVE 2017/11/09 2017/11/09 -1.0000 E000008-	T0006		PROC - Proc		
R Position Linking	RSA_ANN_L 2018/03/07 2018/03/08 2.0000 E000008-	T0001		PROC - Proc		
	RSA_ANN_L 2018/07/01 2018/07/02 0.5000 E000008-	T0001		PROC - Proc		
	RSA_ANN_L 2018/07/02 2018/07/02 1.0000 E000008-	T0001		PROC - Proc A - AM (Morn	P - PM (Aft	
Utilities v	RSA_ANN_L 2018/08/08 2018/08/08 1.0000 E000008-	T0001		PROC - Proc A - AM (Morn	P - PM (Aft	
De lett	RSA_ANN_L 2018/08/15 2018/08/15 1.0000 E000008-	T0001		PROC - Proc A - AM (Morr	P - PM (Aft	
Generic melus V	RSA_ANN_L 2018/08/16 2018/08/16 1.0000 E000008-	T0001		PROC - Proc		
💮 Parameters 🗸 🗸	RSA_ANN_L 2018/10/28 2018/10/29 0.5000 E000008-	r0001		PROC - Proc		

The Leave Items in Progress section will display all leave transactions still in the workflow, awaiting final approval.

	Leave Items In Progress											
Drag	a column	header and drop it here	to group by that column									
		Leave type ~	Reference Nu ~	From Date ~	To Date 🗸 🗸	Units Taken 🗸	Leave reason ~	Note Received ~	Takeon Trans 🗸	Date Submitted ~	Date Approved 🛛 🗸	
Ci	ancel	Annual Leave	E071100-T0047- N00001	12 Dec 2018	19 Dec 2018	5.0000	Annual Leave			13 Nov 2018		
н	4 1 1	E E										

You can click on the **Cancel** button to cancel a leave transaction still in progress. A message will be displayed that prompts you to acknowledge that you want to cancel the transaction.



Select **Yes** to cancel the transaction. The cancelled leave transaction will be removed from workflow and deleted.



The Cancel Leave Items in Progress section will display all cancelled leave transactions that have not been processed yet, i.e. history transactions that were cancelled from the Completed Leave Items section awaiting approval.

Ca	ncel Leave I	tems In Prog	gress							
Drag a column	header and drop it here	to group by that column								
	Leave type 🛛 🗸	Reference Nu v	From Date ~	To Date 🗸 🗸	Units Taken 🗸 🗸	Leave reason v	Note Received v	Takeon Trans 🗸	Date Submitted v	Date Approved V
Cancel	Annual Leave	E071100-T0047- N00001	07 Sep 2018	07 Sep 2018	-1.0000	Annual Leave			20 Nov 2018	
н н 1 1	► H									

To view more leave transactions for any one of the three sections, you can use the arrows to navigate to other pages or click on the required page at the bottom of each section.

If any leave history transaction is ticked for Take-on Transaction, cancelling the before mentioned transaction will not reduce the employee's available leave with the units taken specified in the transaction.

C	mpleted Lo	eave Items										
ag a colum	header and drop it h	ere to group by that colur	nn									
	Leave type	- Reference Nu	- From Date	<ul> <li>To Date</li> </ul>	- Units Taken	- Leave reason	- Note Received	- Takeon Trans	Date Submitted	Date Approved	- Final Approver	
Cancel	Annual Leave	371319	26 Oct 2018	26 Oct 2018	1.0000	Annual Leave						
Cancel	Annual Leave	371385	07 Sep 2018	07 Sep 2018	1.0000	Annual Leave						
												1 - 2 of 2 item
	ava Itama	In Progress										
Le	ave items	the second s										
Le	ave items											
Le ag a colum	header and drop it h	ere to group by that colur	nn									
Le Ig a colum	header and drop it h	ere to group by that colur	rin - From Date	- To Date	- Units Taken	- Leave reason	- Note Received	- Takeon Trans	- Date Submitted	- Date Approved	<ul> <li>Final Approver</li> </ul>	
Le ag a colum Cancel	header and drop it h	Reference Na     E071100-T0047-     N00001	nn Féore Date 12 Dec 2018	<ul> <li>To Date</li> <li>19 Dec 2018</li> </ul>	- Units Taken 5 0000	<ul> <li>Leave reason</li> <li>Annual Leave</li> </ul>	Note Received	Takeon Trans	<ul> <li>Date Submitted</li> <li>13 Nov 2018</li> </ul>	Date Approved	<ul> <li>Final Approver</li> <li>Deepak Gangaram</li> </ul>	

This will normally be history transactions for the employee that the employer would like to keep track of for history purposes. This checkbox is an indication of whether this transaction was only captured for history purposes, i.e. did not reduce the employee's available leave balances.