

Leave administration

Another Check-In · A01

Before the demonstration

Berland Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Learner explains how policy/year/allocation and ledger changes affect available leave.

Policy and year

Bertrand Hope

- Open Admin > Leave Entitlements and inspect policy/year state
- create the approved training policy version and open the training year

In this step

Use policy values approved by the organization. Check the policy version and the target year before making changes. Opening a year prepares its administration but does not itself prove that every eligible employee has an allocation.

Employee allocations

Bertrand Hope

- Generate missing eligible allocations and inspect employee/type/year before changing balances

In this step

Generate missing eligible allocations and inspect the employee, type and year. Review existing entries before applying any adjustment. The purpose is to establish the intended entitlement without duplicating amounts already present.

Reasoned adjustments

Bertrand Hope

- Record an individual adjustment with reason, or download the allocation template and preview a prepared CSV

In this step

An adjustment changes a balance and needs a clear reason. For bulk work, begin with the supported template and inspect the preview. A spreadsheet total cannot replace row-level checks for staff identity, type and year.

Reconciliation and reports

Bertland Hope

- Confirm only validated adjustments and inspect reconciliation/history
- use Leave Reports filters and export

In this step

Confirm only rows that pass validation and match the approved changes. Then trace the result through history and the leave report. Compare a representative statement with the report so that the effect is understandable.

Year closure

Bertland Hope

- Close the prepared year only after reconciliation
- reopen with an audited reason when authorized

In this step

Reconcile before closing the year. Reopening is an authorized action with an audited reason, not a routine shortcut. Keep the explanation for any late adjustment with the year's administration records.

Common problems

Bertland Hope

- Regenerating as if it resets allocations
- adjusting wrong year/type
- importing without preview
- inventing leave entitlement values from the application

A useful support report

The task and record

The expected result

The actual message

The authorized next step

Guided practice

Berland Hope

- Generate a missing training allocation, apply one documented adjustment and reconcile the statement/report
- Discuss a blocked close or invalid import

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

Bertland Hope

- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Learner explains how policy/year/allocation and ledger changes affect available leave.