

Employee Group

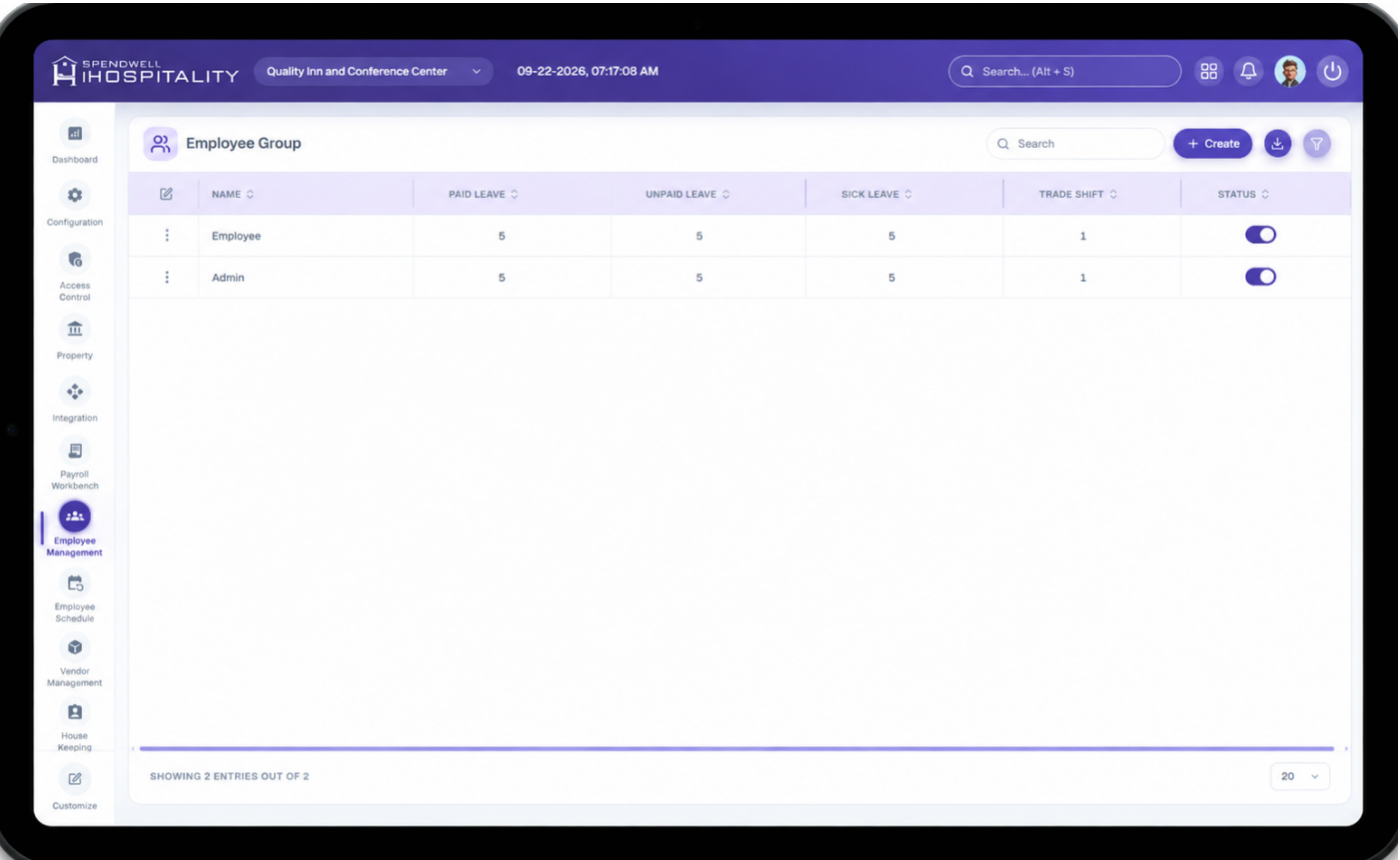
Overview

The **Employee Group** feature allows administrators to define groups that employees can be assigned to, based on role, department, or workforce category. Each employee group carries its own leave and shift trade limits — both a **yearly count** and a **monthly count** — which control how much paid leave, unpaid leave, sick leave, and shift trades employees in that group can use.

Employee Group is used across the platform wherever leave balances and shift trade limits need to be applied consistently to a set of employees, rather than configured individually per person.

Employee Group List

The **Employee Group** list screen shows all configured employee groups along with their leave and shift trade limits, so administrators can review or update them at a glance.



From this screen, administrators can:

- View all existing employee groups.
 - Open a group to review or edit its leave and shift trade limits.
 - Create a new employee group.
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Add Employee Group

The **New Employee Group** screen is used to create a group and define its leave and shift trade allowances.

Key Fields

- **Name** — Name of the employee group (e.g. Housekeeping Full-Time, Front Desk Part-Time).
- **Paid Leave Count** — Total paid leave days allowed per year for employees in this group.
- **Unpaid Leave Count** — Total unpaid leave days allowed per year for employees in this group.
- **Sick Leave Count** — Total sick leave days allowed per year for employees in this group.
- **Trade Shift Count** — Total number of shift trades allowed per year for employees in this group.
- **Paid Leave Count Per Month** — Maximum paid leave days an employee in this group can take within a single month.
- **Unpaid Leave Count Per Month** — Maximum unpaid leave days an employee in this group can take within a single month.
- **Sick Leave Count Per Month** — Maximum sick leave days an employee in this group can take within a single month.

New Employee Group

NAME •
Enter Name

PAID LEAVE COUNT •
Enter Paid Leave Count

UNPAID LEAVE COUNT •
Enter Unpaid Leave Count

SICK LEAVE COUNT •
Enter Sick Leave Count

TRADE SHIFT COUNT •
Enter Trade Shift Count

PAID LEAVE COUNTER MONTH •
Enter Paid Leave Count Per Month

UNPAID LEAVE COUNTER MONTH •
Enter Unpaid Leave Count Per Month

SICK LEAVE COUNTER MONTH •
Enter Sick Leave Count Per Month

Reset Save

Example: A group named "Housekeeping Full-Time" is set with a Paid Leave Count of 12 (yearly) and a Paid Leave Count Per Month of 2. Employees in this group have 12 paid leave days to use across the year, but can never take more than 2 paid leave days within the same month.

Steps

1. Select **New Employee Group**.
2. Enter the **Name** of the group.
3. Enter the **Paid Leave Count**, **Unpaid Leave Count**, and **Sick Leave Count** (yearly totals).
4. Enter the **Trade Shift Count** (yearly total).
5. Enter the **Paid Leave Count Per Month**, **Unpaid Leave Count Per Month**, and **Sick Leave Count Per Month**.
6. Select **Save** to create the group.

Note: Once created, employees can be assigned to this group, and their leave requests and shift trades will be validated against both the yearly and monthly limits configured here.

Important Notes

- Employee Group defines both **yearly** and **monthly** limits for Paid Leave, Unpaid Leave, and Sick Leave.
 - Employee Group also defines a yearly limit for **Trade Shift Count**.
 - All required fields must be filled in before a group can be saved.
 - Leave and shift trade requests submitted by employees are validated against the limits set on their assigned employee group.
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Revision #3

Created 14 September 2026 05:08:47 by Kuldeep Patel

Updated 22 September 2026 13:34:58 by Shrikant Patel