Process External Leave

Infinet Cloud Payroll Bundle 30500 also has the ability to manage "leave only" for employees in some circumstances. That is, even if the employee is not being processed in payroll we may still be able to manage their leave accruals, balances and leave requests. We call this "Process External Leave"

NB: There are a number of limitations or restrictions that may apply.

1. Translations are not available via Standard NetSuite functionality and not offered by Infinet for scripted functionality. Customer would need to confirm if browser translation tools would be suitable.
2. Leave must still be "processed" on a per period basis. Eg. Monthly (Automation normally occurs within payroll processing so to update balances and generate leave history the Customer must still run a regular process within the system.
3. Infinet Cloud does not monitor or maintain rules, requirements or public holidays outside of AU, NZ, UK. Public Holidays only for USA and SG may be maintained at Infinet's discretion.
4. Default settings and configuration occur at the Subsidiary level only within NetSuite.
5. Customer must fully determine if Infinet's current Leave Management capabilities for managing accruals and leave taken are suitable for Customers requirements. Infinet does not offer additional development for leave accruals or processes outside of current capabilities unless agreed in writing.
6. Customer must monitor and maintain public holidays, accrual rates, employee setup, leave types and any other rules or requirements internally unless otherwise agreed in writing specifically by Infinet.
7. Infinet will require Administrator access to Customers NetSuite account for initial pre-configuration and setup actions.
8. For employees to access self service functionality Customer must ensure they have enough NetSuite employee center licences.
9. Leave Liability provision journals are excluded unless otherwise agreed in writing by Infinet.
10. Infinet does not offer additional custom reports unless otherwise agreed in writing by Infinet. Any additional reporting outside of standard Payroll menu options will be via Customer created saved searches.
11. Payroll Admin role or NetSuite Administrator role must be used by Customer for system configuration, Employee setup and Leave processing.
12. Licencing for employees using "external leave" must be agreed with Infinet and commercials completed.
13. Customer must provide all data in suitable format that is required for pre-config setup.

As Leave Management is a part of ICS Payroll, Employees and Approvers must be set up in NetSuite in a Subsidiary for which Payroll and Leave Config wizards have been completed.

Configuration and Setup required.

1. **Pre-Config (Infinet)**
   a. Countries
   b. Payroll States
   c. PAYG Calc Type
   d. Generic Tax Placeholder
   e. Leave Accrual rates
   f. Leave Types
   g. Public Holidays (Customer to provide initial import as excel list by Payroll State)
   h. Documents Folder
   i. Placeholder Pay run

2. **Payroll Wizard (Infinet/Customer)**
   As Leave Management is a part of ICS payroll the Payroll wizard must be completed in each Subsidiary in order to use functionality for employees within that Subsidiary. Payroll does not need to be processed but many of the defaults and settings are part of our payroll and come from Payroll Config

3. **Leave Wizard (Infinet/Customer)**
   Leave Management wizard must be completed in each Subsidiary in order to use functionality for employees within that Subsidiary.

4. **Employee Setup (Customer)**
   Employee setup is largely the same as employee record payroll requirements. The key setting is found on the Leave Info tab. "Process External Leave" must be ticked for each employee. Infinet will provide a training session on employee setup.

5. **Process External Leave (Customer)**

In order to create leave history records for accruals and leave taken Customer must "Process external leave" on a periodic basis depending on their requirements. Eg. Monthly. Infinet will provide a training session on this process.

Leave history is only created for balance driven leave types.

1. Navigate to Payroll Admin>Payroll Setup>Update Employees Deployment
2. Select the "Subsidiary" and then update action "Process external leave" (Allow the page to refresh)
3. Select the "Pay Frequency" and "From and To Dates" for the period you want to process. (Normally the period just completed, eg. Last month)
4. Click "Review Accrual"
5. Confirm OK and click "Submit" (Ensure "Update Leave" is ticked)
6. Leave history for accruals and taken leave will be created onscreen for small numbers or as scheduled process. The script will redirect to "scheduled script queue" for a scheduled process. Click "refresh" to ensure complete

Once the Leave history has been created the NetSuite timesheets must be updated to show the leave is now processed. To do this we need to update the timesheets onto a placeholder pay run.

1. **Update time and Leave requests. (Customer)**

Please check with your Infinet implementation consultant on your exact process. This process is normally driven by triggering a user initiated saved mass update. Under certain circumstances a scheduled workflow can be used to complete this automatically. In either case the timesheets for the period in step 5. above are attached to a placeholder pay run to indicate they have been processed. The associated leave request will then be updated to a status of processed. Infinet will provide a training session on this process.

Balance discrepancies may occur if both "Process External Leave" and "Update time and Leave requests" are not completed one after the other.