

Leave Tracker System

Administrator User Manual

Version: August 18, 2026

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1. About administrator access

Administrators use Leave tracker to monitor company-wide leave activity, manage employee profiles and policies, configure holiday calendars, import historical data, and audit changes. You must sign in with an account that carries the administrator role (in addition to employee). Authentication alone does not grant admin access.

2. Signing in and opening the admin workspace

Open the administrator workspace

Purpose
After SSO sign-in, choose the admin workspace from the landing page.

How to do it
1. Click Sign in with SSO — the same process as employees.
2. On the landing page, locate **Enter admin workspace** under the **Administrator** role.
3. Click **Open workspace**.
4. You arrive at **Administrator activity** (activity feed).

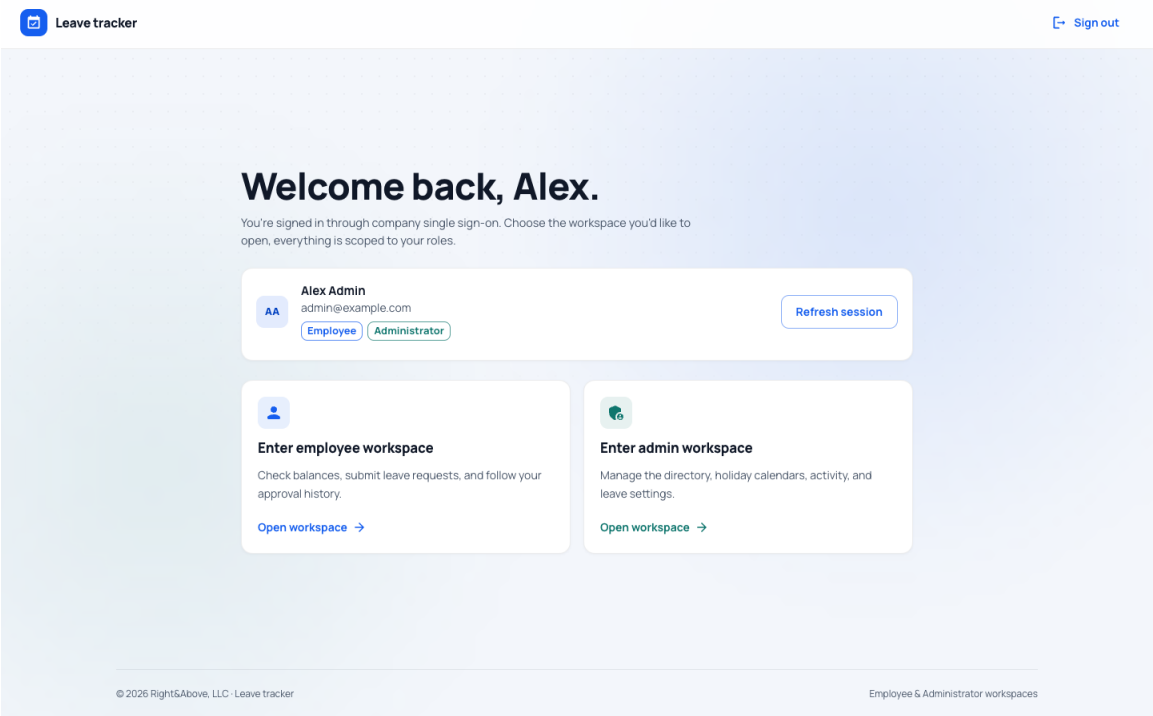


Figure 1 — Landing page with administrator workspace card

3. Administrator navigation

The administrator sidebar contains:

- **Activity — Activity feed, Audit logs**
- **Manage — Employees, Settings**

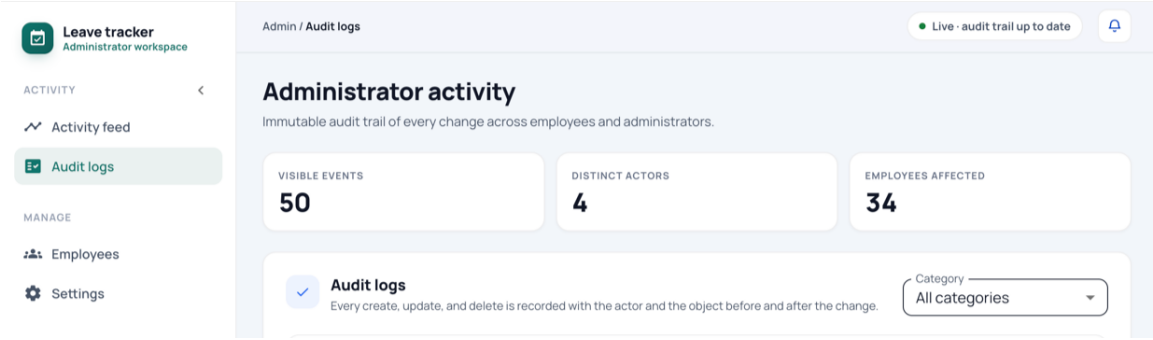


Figure 2 — Administrator activity feed

4. Activity feed

Monitor leave requests across the company

Purpose

The activity feed lists every leave request ordered by most recent activity.

How to do it

1. Open **Activity feed** from the sidebar.
2. Review metric tiles: **Total requests**, **Pending**, **Approved**, **Rejected**, **Cancelled**.
3. Scroll the **Activity feed** list to see employee name, dates, status, and last activity.
4. Click **Filters** to narrow the list.
5. Use **Review** when you are an approver with a vote to cast.
6. Use **Decide** to override as an administrator.
7. Use **Open request** to view settled requests.
8. Click **Load more requests** at the bottom if available.

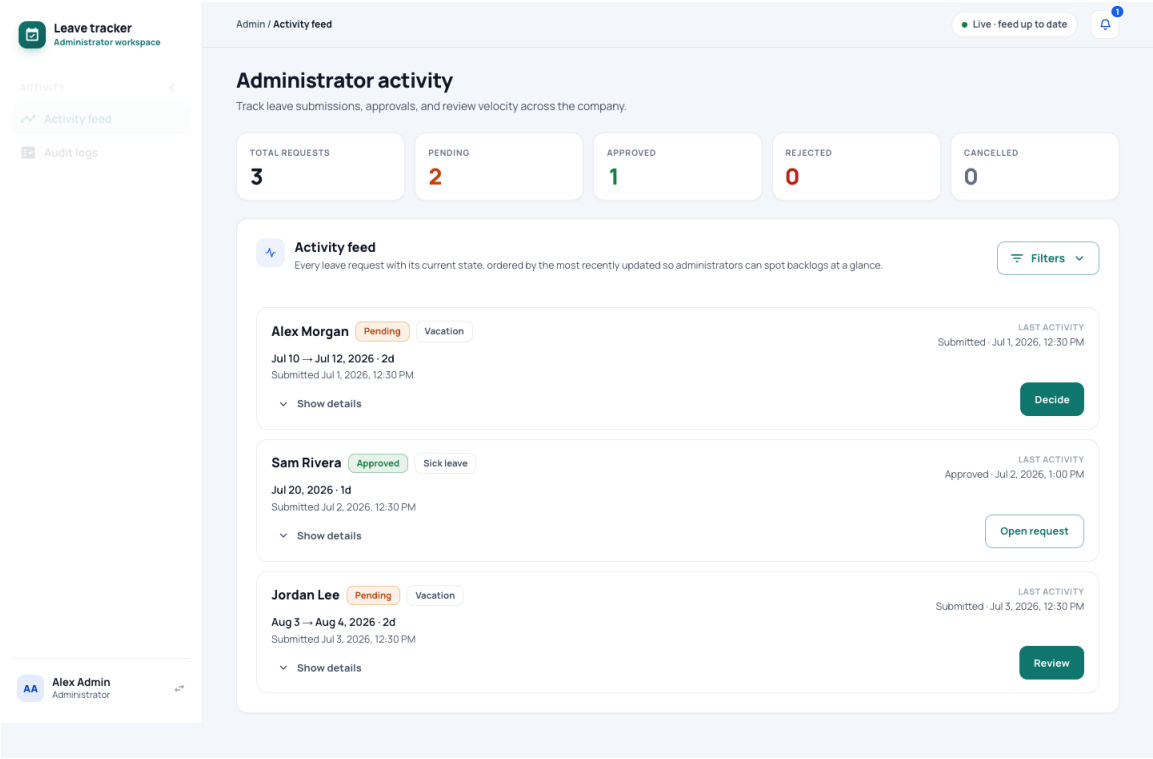


Figure 3 — Activity feed with summary metrics

Filter the activity feed

Purpose

Combine filters to find specific requests.

How to do it

1. Click **Filters**.
2. Set **Employee**, **Approver**, **Status**, **Leave type**, and/or **Leave range**.
3. Click **Clear filters** to reset.

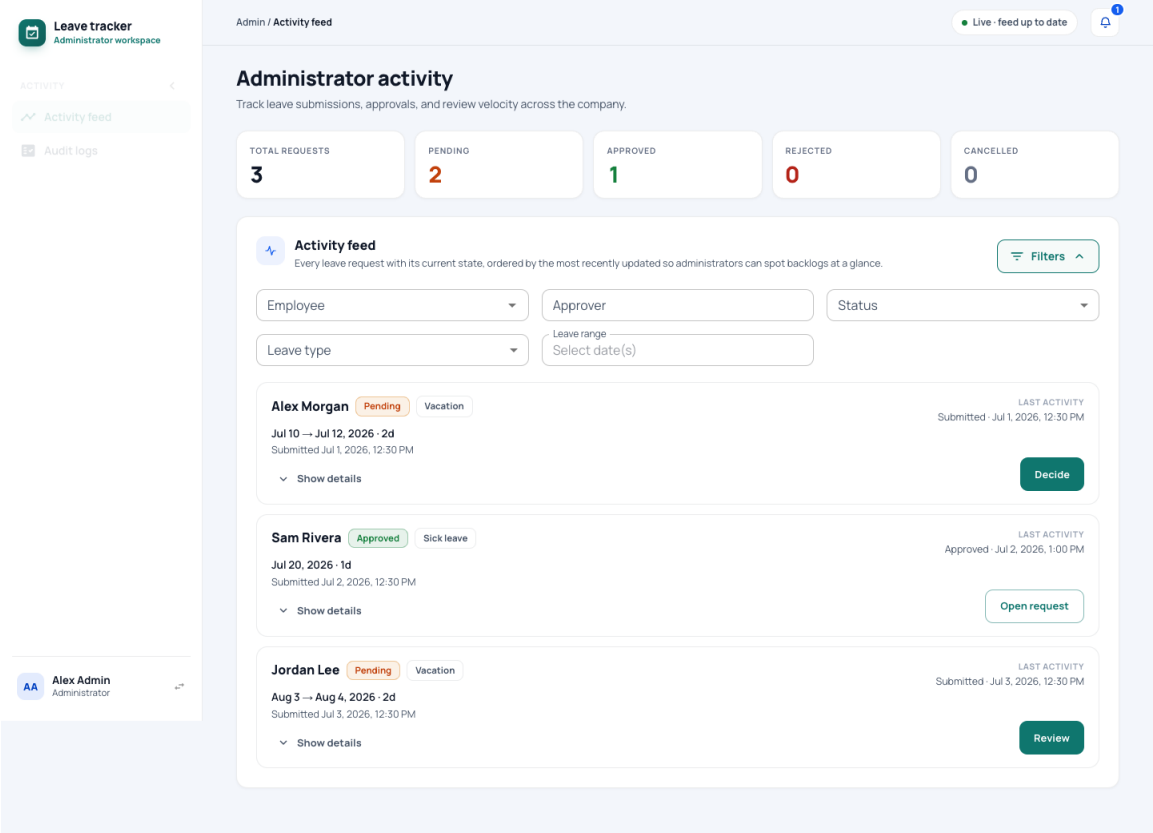


Figure 4 — Activity feed filters expanded

5. Overriding a pending request

Force-approve or force-reject a request

Purpose

When approvers are unavailable or deadlocked, an administrator can settle a pending request directly.

How to do it

1. On the activity feed, click **Decide** on a pending row.
2. In **Override the approver gate**, review **Approvers you would overrule**.
3. Enter an **Override reason** (required).
4. Click **Approve request** or **Reject request**.
5. Click **Cancel** to close without deciding.

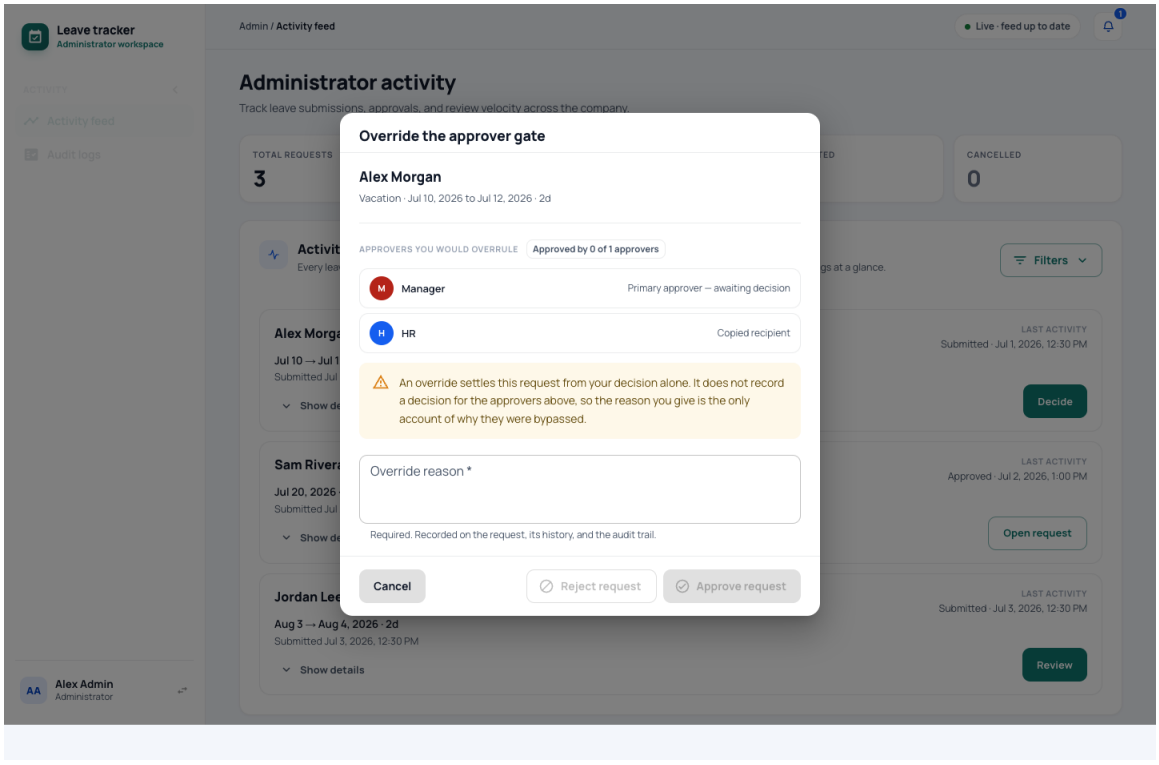


Figure 5 — Override dialog with reason field

Notes

- The override reason is recorded on the request, its history, and the audit trail.

6. Audit logs

Review the immutable audit trail

Purpose

Every create, update, and delete across employees and settings is logged with before/after values.

How to do it

1. Click **Audit logs** in the sidebar.
2. Review metric tiles: **Visible events**, **Distinct actors**, **Employees affected**.
3. Filter by **Category** (Authentication, Employee, Leave request, Policy, Data import, and others).
4. Expand an entry with **Show before / after** to see field-level changes.
5. Click **Load older events** for earlier history.

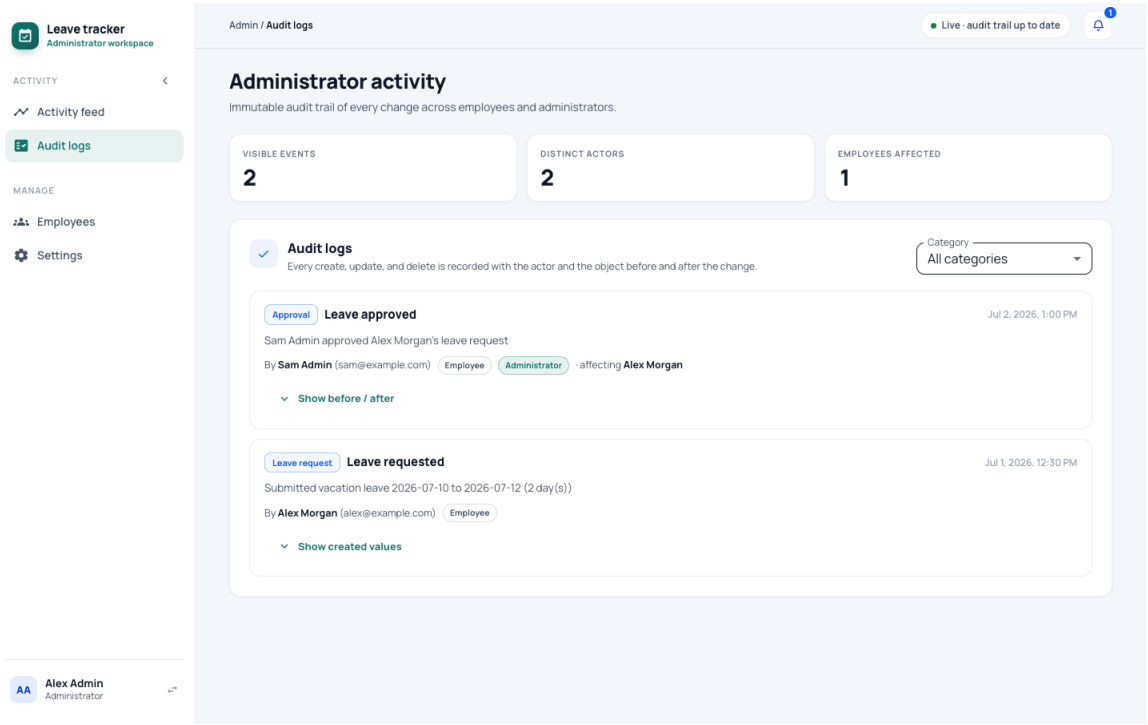


Figure 6 — Audit logs with category filter

7. Employee directory

Search and browse employees

Purpose

The directory lists every account with filters for role, project, policy, country, and profile completeness.

How to do it

1. Click **Employees** in the sidebar.
2. Review header metrics: **Employees**, **Administrators**, **Awaiting review**.
3. Use **Search** (name or email) and filter dropdowns as needed.
4. Click **Clear filters** to reset.
5. Click a row to preview details in the right pane.
6. Click the employee name or open the full profile from the preview.

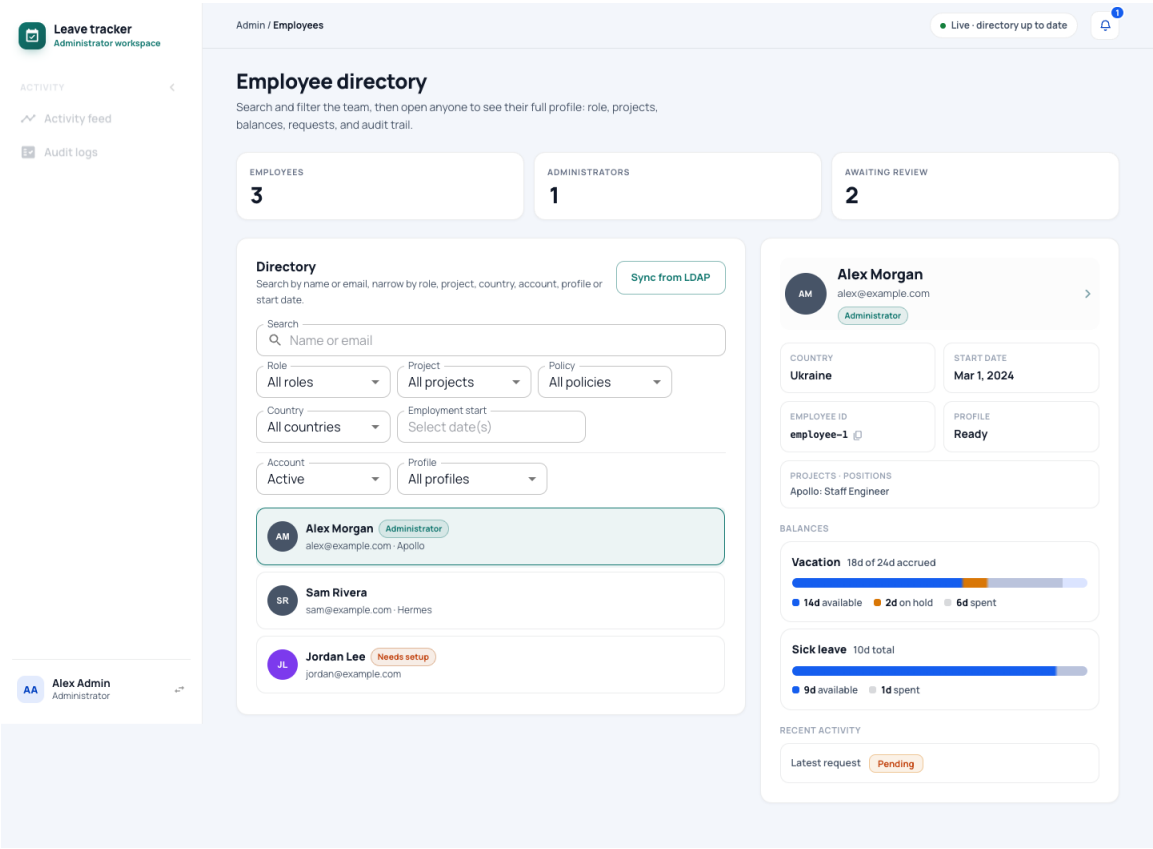


Figure 7 — Employee directory with filters

8. Employee profile

Manage an employee's employment details

Purpose

The profile page has tabs: **Profile**, **Balance**, **Requests**, and **Audit**.

How to do it

1. From the directory, open an employee's full profile.
2. On the **Profile** tab, review **Employment**, **Projects and positions**, and **Leave policy**.
3. Click **Edit** in **Employment** to change **Employment start**, **Country**, or **Assigned calendar**.
4. Click **Save changes** or **Cancel**.
5. Use **Transfer** under **Leave policy** to move the employee to another policy.

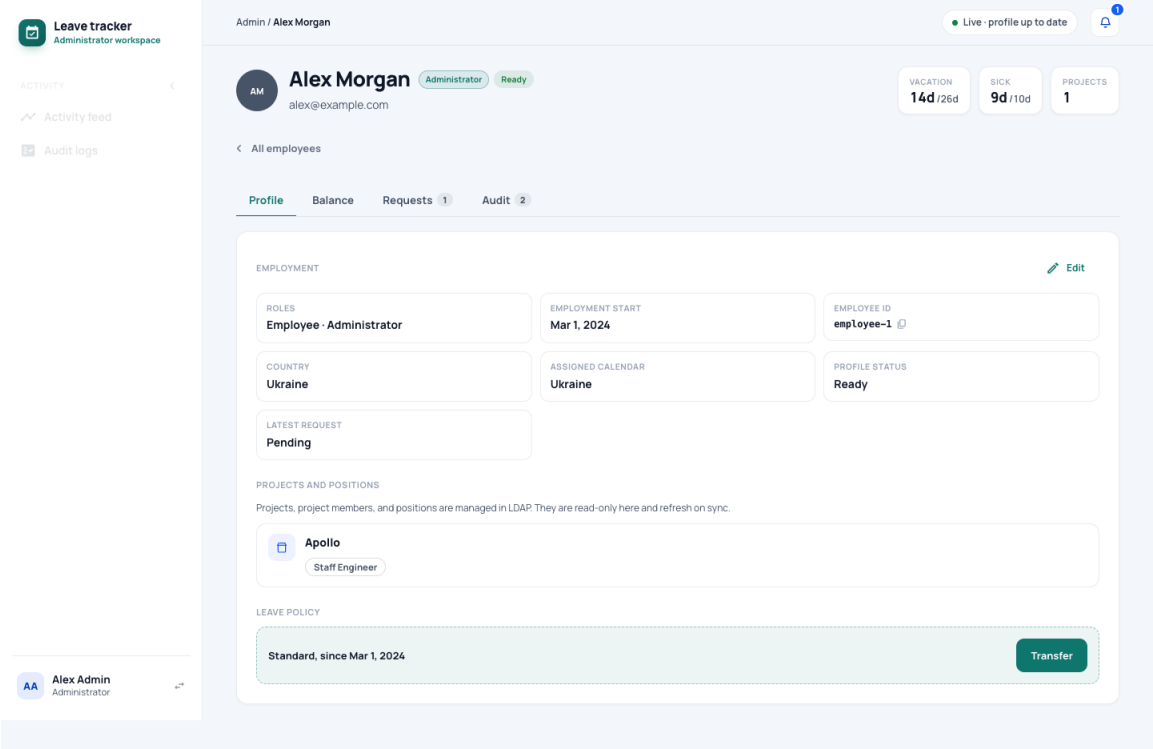


Figure 8 — Employee profile — Profile tab

Notes

- Projects and positions are read-only (synced from LDAP).
- Country changes must be made in LDAP unless editing is allowed for calendar assignment.

9. Adjusting vacation balance

Manually adjust vacation days

Purpose

Add or remove vacation for the current leave year with a documented reason.

How to do it

1. Open the employee profile and select the **Balance** tab.
2. In **Adjust vacation**, choose **Add** or **Remove** if you need to adjust employee balance manually.
3. Set **Days** with the stepper.
4. Enter a **Comment** explaining the change.
5. Click **Review & apply**, then **Confirm** in the confirmation dialog.

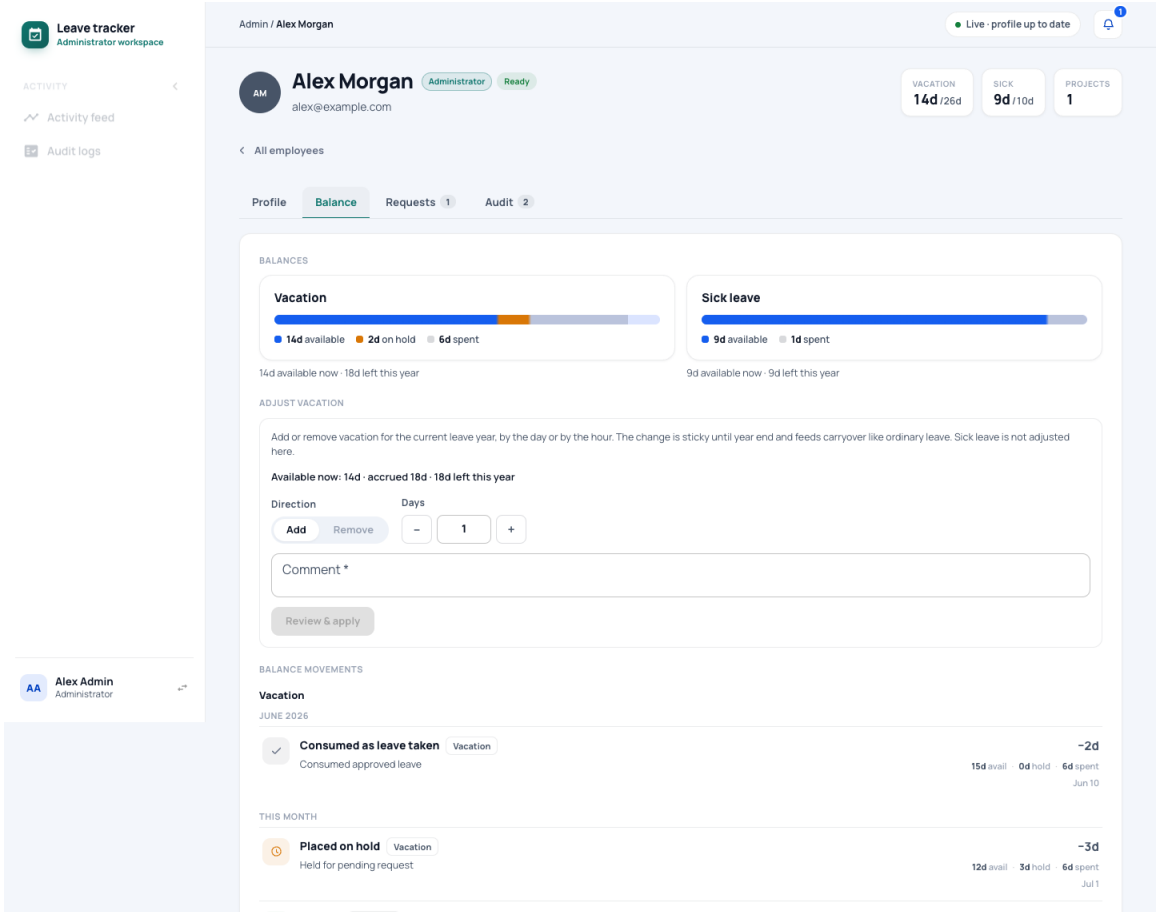


Figure 9 — Balance tab with vacation adjustment controls

Notes

- Sick leave is not adjusted on this screen.

10. Employee profile — Requests tab

Review an employee's leave history

Purpose

The **Requests** tab lists every leave request the employee has submitted, newest first.

How to do it

1. Open an employee's full profile from the directory.
2. Click the **Requests** tab (the badge shows how many requests exist).
3. Review each card: **leave type**, **status**, date range, paid/unpaid day split, and submission time.
4. Read optional comments shown in italics under a request.
5. Use **Decide pending requests in the Activity feed →** to approve or reject items still awaiting a decision.

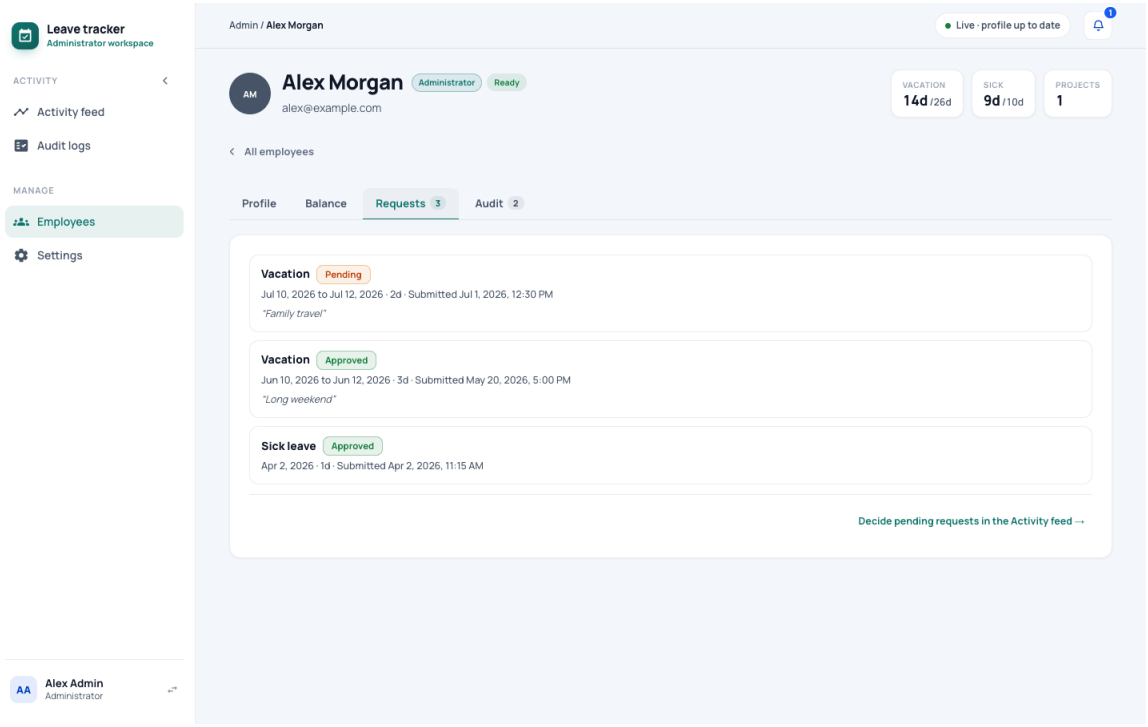


Figure 10 — Employee profile — Requests tab with leave history

Notes

- This tab is read-only — you cannot approve or reject from here.
- If the employee has never submitted leave, you see "**This employee has not submitted leave requests yet".**

11. Employee profile — Audit tab

See events that involve this employee

Purpose

The **Audit** tab shows a filtered slice of the audit log: events where the employee is the actor or the target.

How to do it

1. On the employee profile, click the **Audit** tab.
2. Under **Events affecting this employee**, review each entry's summary, actor, timestamp, and category.
3. Expand an entry with **Show before / after** to inspect field-level changes.
4. Click **Open this employee's audit trail** to open the full audit log pre-filtered to this employee.
5. Use **Open the full audit log →** at the bottom to browse all events company-wide.

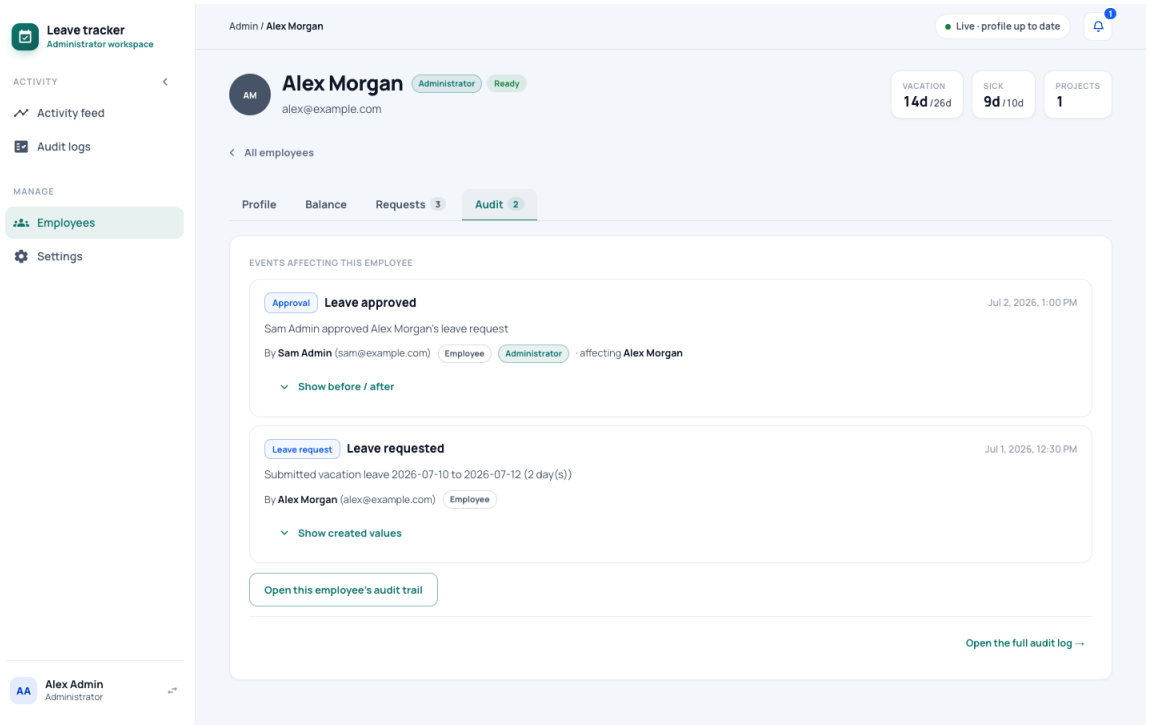


Figure 11 — Employee profile — Audit tab with employee-scoped events

Notes

- The tab badge appears once audit events have loaded.
- If events fail to load, a warning is shown but the rest of the profile stays usable.

12. Settings — Policies

Manage leave policies and defaults

Purpose

Policies define vacation and sick allowances, probationary periods, and who the policy applies to. Each employee belongs to exactly one policy.

How to do it

1. Click **Settings** in the sidebar.
2. Ensure the **Policies** tab is selected.
3. Click **New policy** to create a policy, or expand an existing policy row.
4. Use **Rename**, **Duplicate with changes**, **Make default**, **Retire...**, or **Delete** as needed.
5. Under **Year-end carryover**, choose **No carryover**, **Capped**, or **All carry over**, then **Save policy**.
6. Under **Approvals and default approvers**, choose **Approval required** or **Approval optional**.
7. Set **Default approvers** and **Default CC recipients**, then click **Save approvers**.

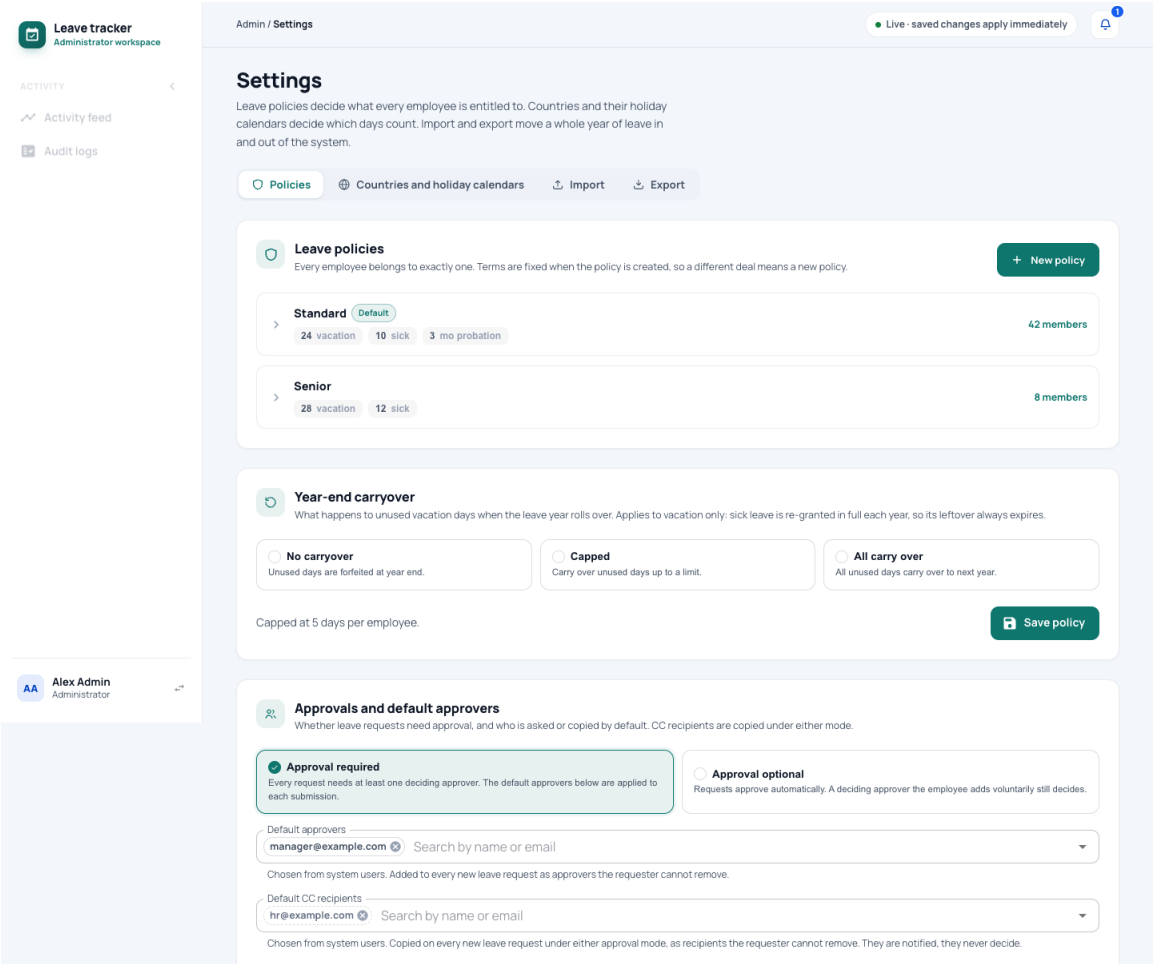


Figure 12 — Settings — Policies, carryover, and approvers

13. Settings — Countries and holiday calendars

Configure countries and public holidays

Purpose

Each country you employ people in needs a holiday calendar per leave year.

How to do it

1. In **Settings**, click **Countries and holiday calendars**.
2. Click **Add country** to add a country and timezone.
3. Click **Manage calendar** or **Add calendar** on a country row.
4. Select a **Leave year**, add holidays with **Add holiday**, and click **Save calendar**.

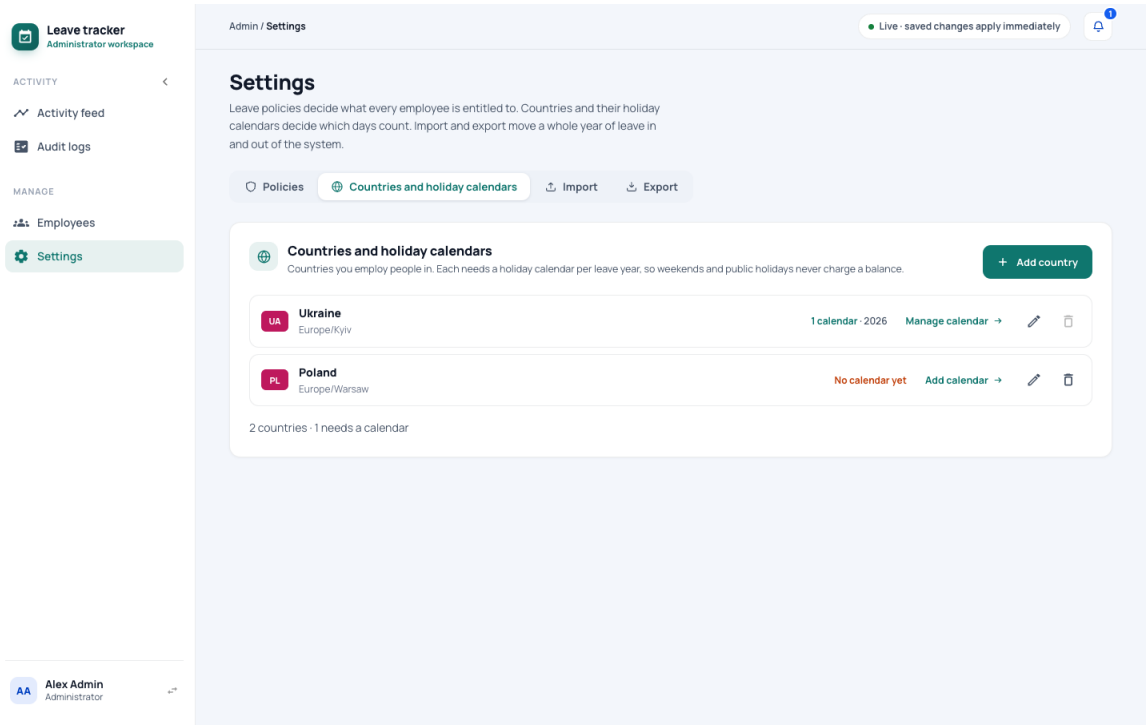


Figure 13 — Settings — Countries and holiday calendars

14. Settings — Import

Import leave data from a workbook

Purpose

The four-step import wizard loads employees and requests from an Excel workbook.

How to do it

1. In **Settings**, click **Import**.
2. Step 1 **Source file**: choose **Add** or **Override (refresh)**, set **Target year** and **File snapshot date**, upload an `.xlsx` workbook, then **Continue to validation**.
3. Step 2 Validation: review blocking errors and warnings; use Run directory sync if any emails are unknown, then Compute preview.
4. Step 3 **Review**: inspect per-employee previews and click **Apply** or **Apply all**.
5. Step 4 **Apply**: confirm progress; when finished, use **View in audit log** or **Start new import**.

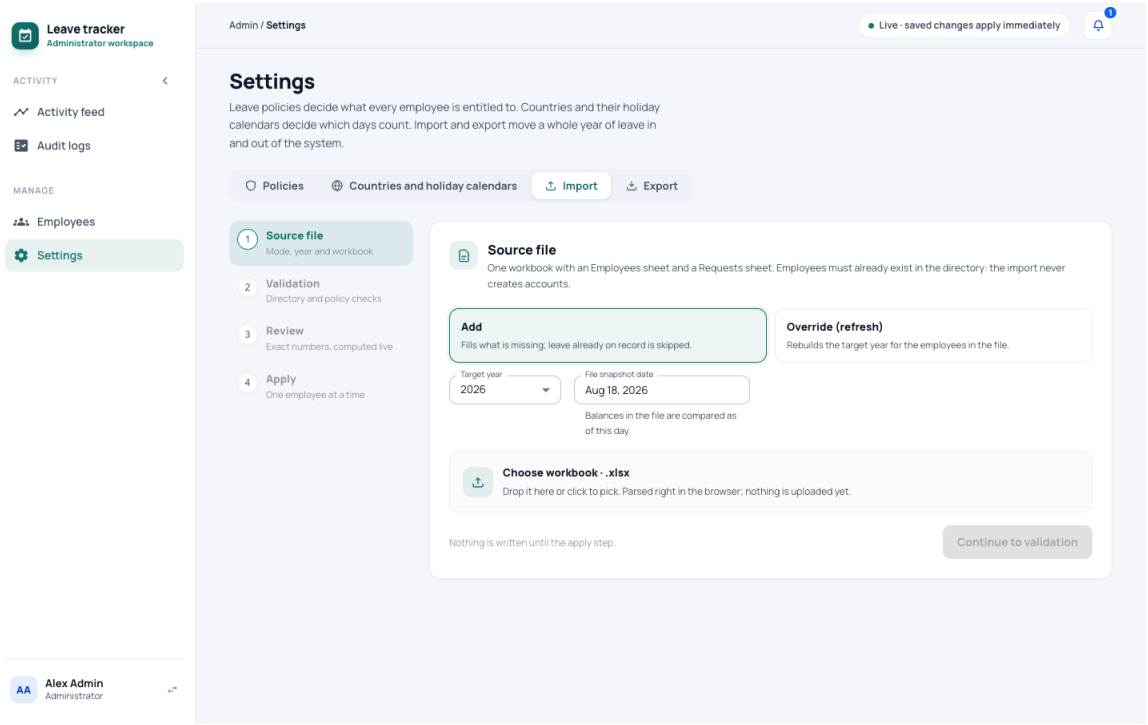


Figure 14 — Import wizard — Source file step

Notes

- Nothing is written until the apply step. Employees in the file must already exist in the directory.

15. Settings — Export

Export a workbook snapshot

Purpose

Export employees, balances, and leave history in the same format the import reads.

How to do it

1. In **Settings**, click **Export**.
2. Choose a **Year**.
3. Select what to include: **Employees and policies**, **Balances as of today**, and/or **Leave history**.
4. Click **Download workbook**.

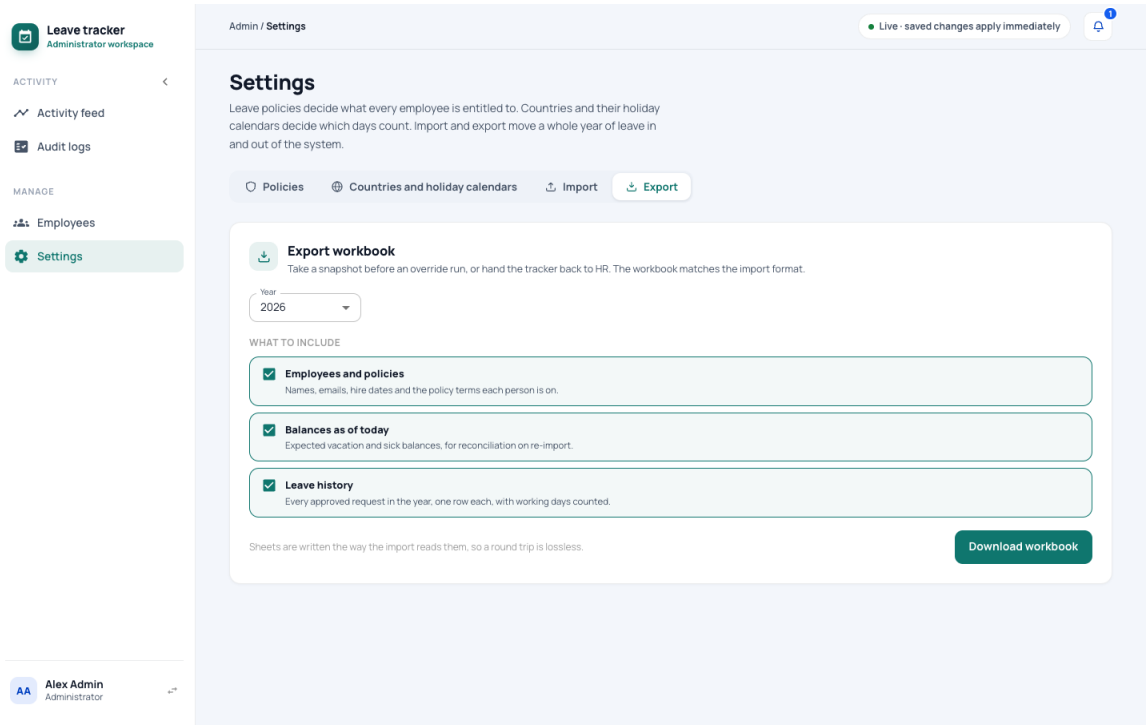


Figure 15 — Export workbook options

16. LDAP directory sync

Sync employees from LDAP

Purpose

Pull accounts, roles, and project memberships from the corporate directory.

How to do it

1. Open **Employees**.
2. Click **Sync from LDAP**.
3. Wait for the sync to finish (button shows **Syncing…** while running).
4. Read the result message describing created, updated, or deactivated accounts.

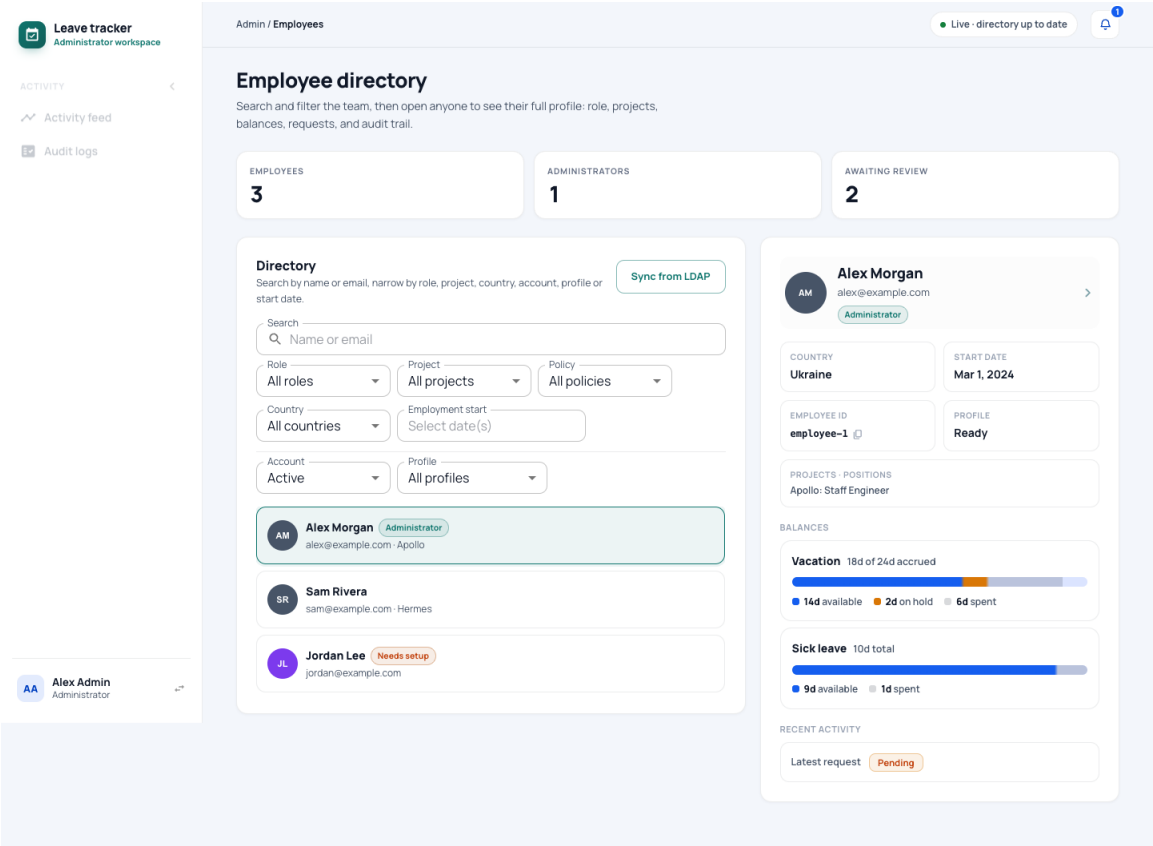


Figure 16 — Employee directory with Sync from LDAP button

Notes

- Scheduled sync may also run automatically depending on server configuration.
- Employment start date and country are not set by sync — complete them in the employee profile.

17. Reviewing requests as an administrator

Open a request from the admin approval route

Purpose

Administrators can open the same review page linked from approval emails.

How to do it

1. From the activity feed, click **Review**, **Decide**, or **Open request**.
2. Or open the same Approval review page from the request.
3. Review request context and record a decision if you are a primary approver.
4. Use **Decide** on the feed for administrator override when appropriate.

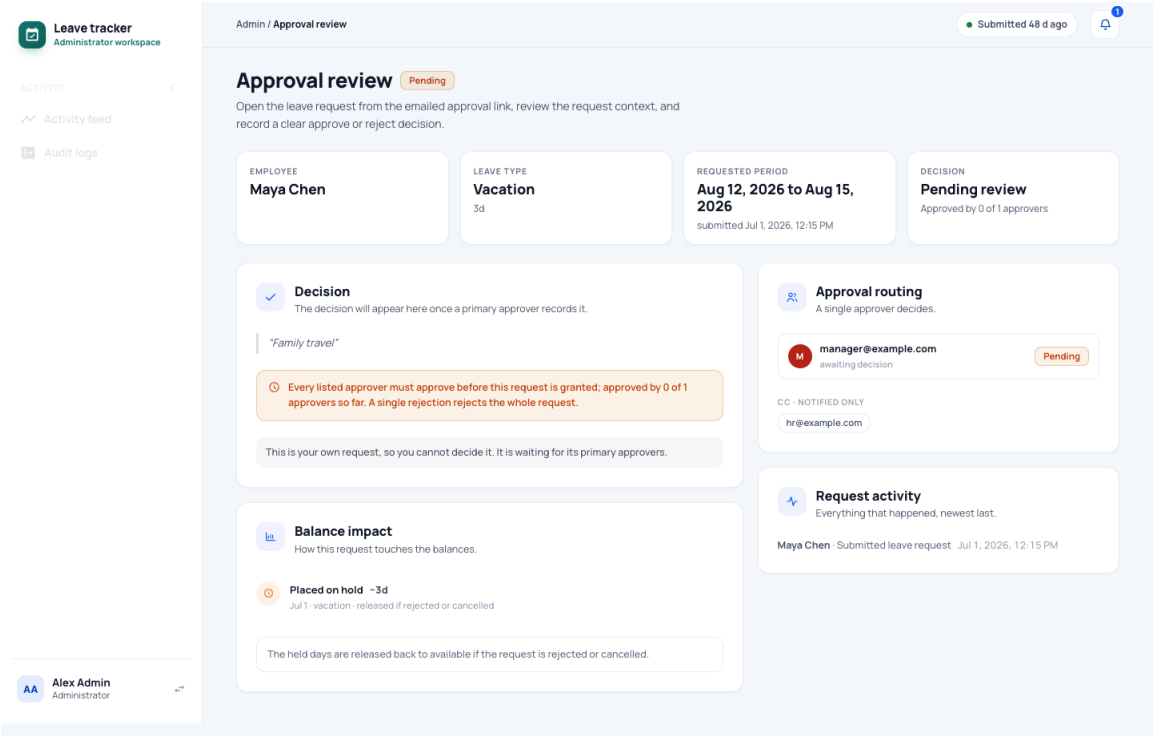


Figure 17 — Administrator approval review page