



# Allocate Leaves To Employees

CA CloudDesk

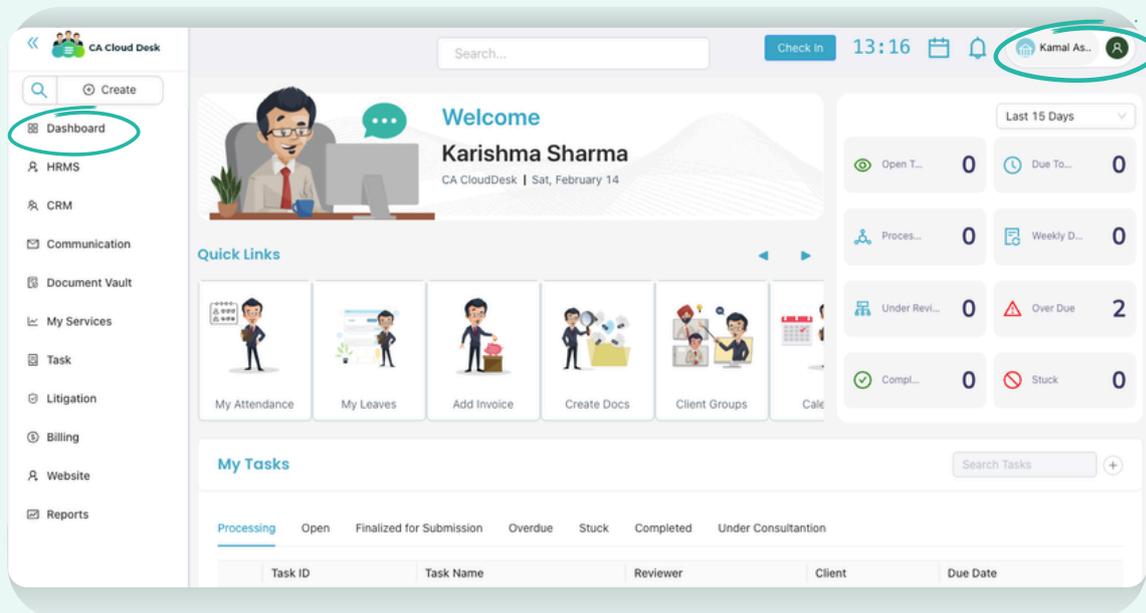


## Part A

### Step 1: Go to Dashboard, then select Profile



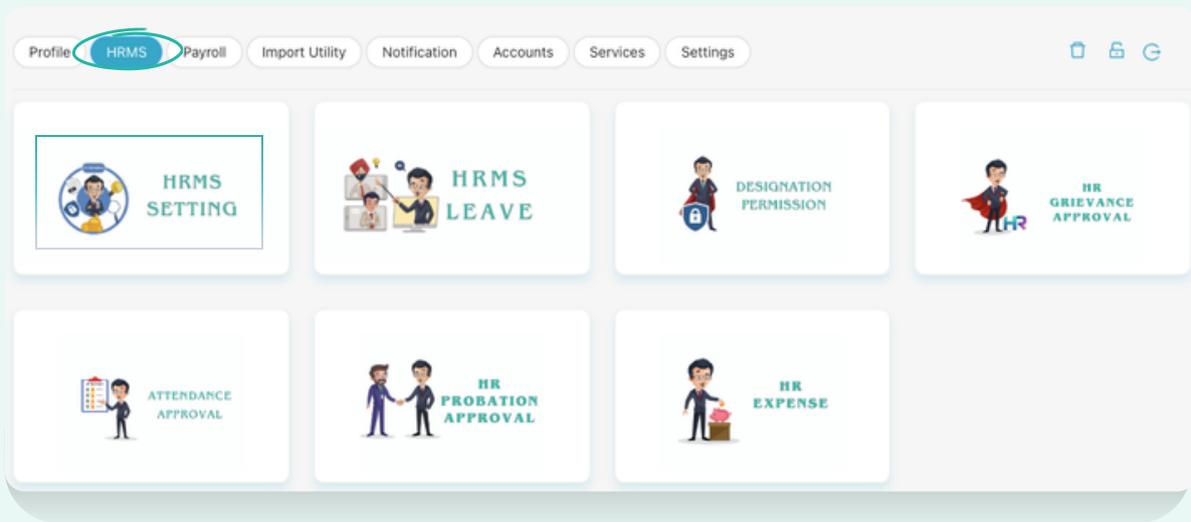
From the main Dashboard, click your profile icon from the top-right corner of the header to open your profile area.



### Step 2: Select HRMS, then HRMS Setting

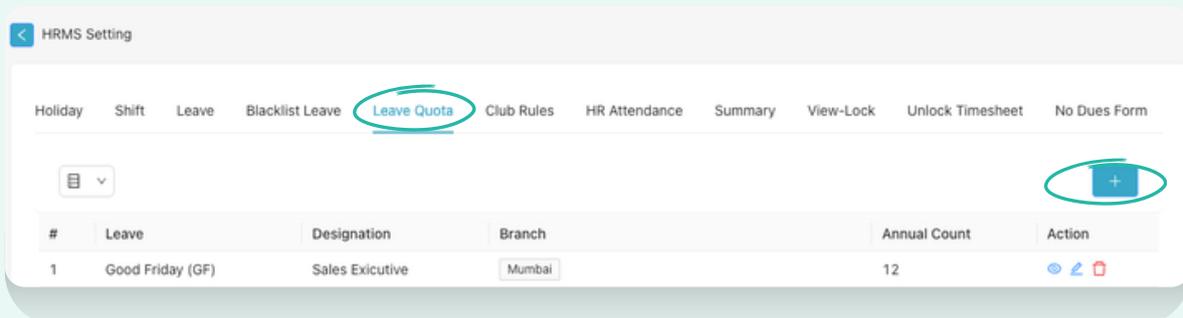
- In the left navigation sidebar, click HRMS.
- On the HRMS page, use the top tabs and select HRMS Setting .





### Step 3: Select Leave Quota

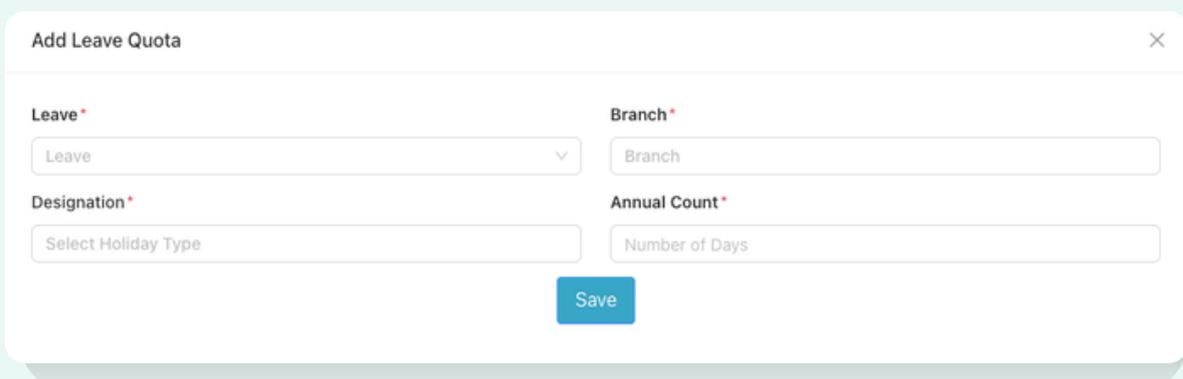
Select Leave Quota, then click the + (plus) icon to add a new leave quota.



### Step 4: Add Leave Quota

Fill Leave type, Branch, Designation, and Annual count, then click Save.

Leave quota setting created successfully.

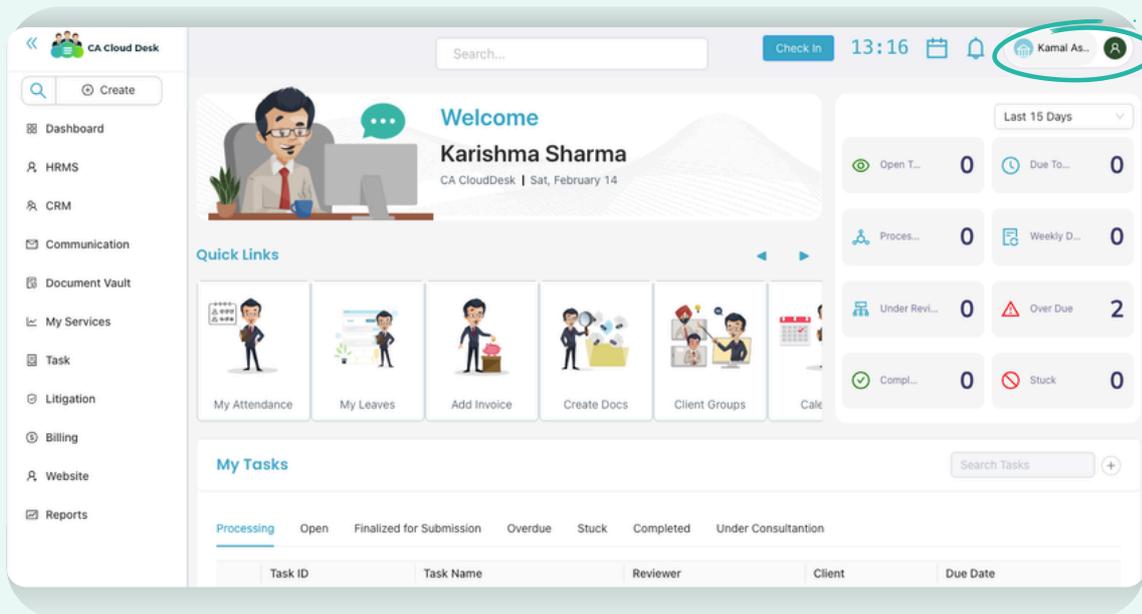


## Part B



### Step 1: Go to Dashboard, then select Profile

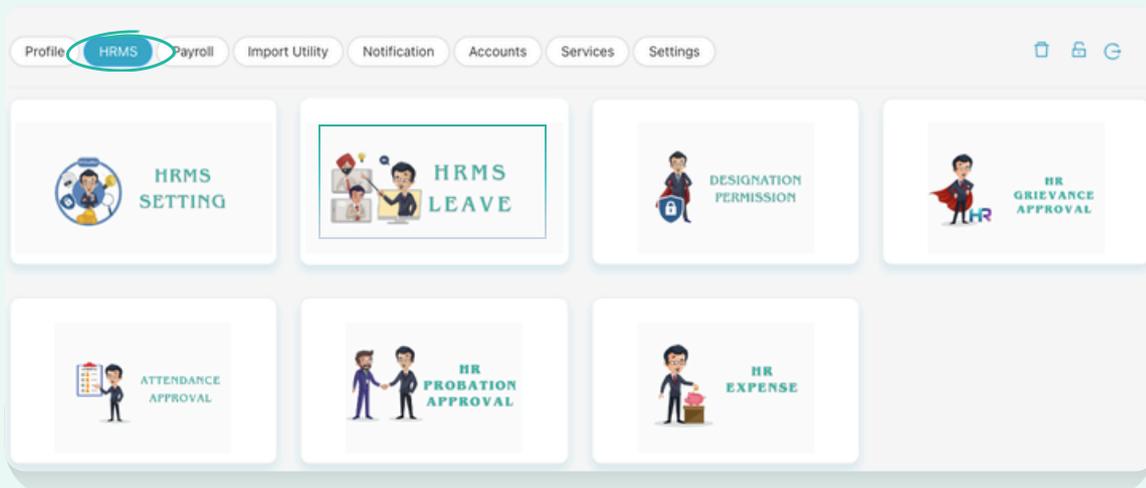
From the main Dashboard, click your profile icon from the top-right corner of the header to open your profile area.



The screenshot shows the CA CloudDesk dashboard. The top right corner features a header with a search bar, a 'Check In' button, the time '13:16', and a profile icon labeled 'Kamal As...' which is circled in red. The main content area includes a 'Welcome' message for 'Karishma Sharma', 'Quick Links' for various tasks like 'My Attendance', 'My Leaves', and 'Add Invoice', and a 'My Tasks' section with a table of task statuses.

### Step 2: Select HRMS, then select HRMS Leave

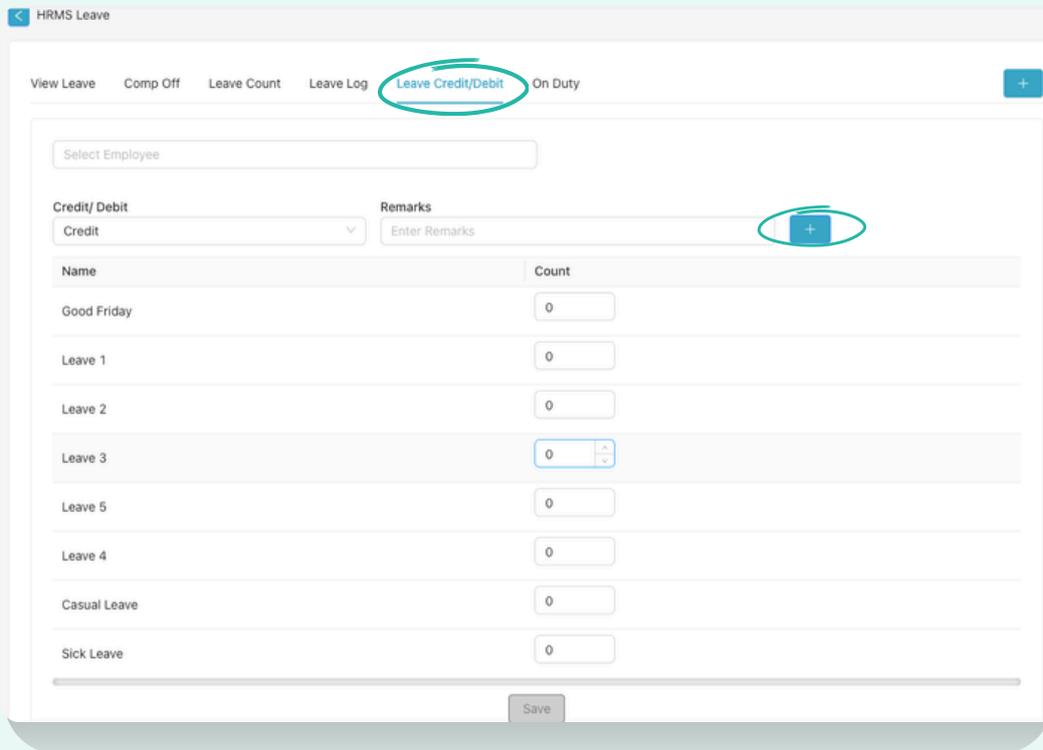
Select HRMS, then select HRMS Leave

The screenshot shows the HRMS menu in the profile area. The 'HRMS' option is highlighted with a red circle. Other options include 'Payroll', 'Import Utility', 'Notification', 'Accounts', 'Services', and 'Settings'. Below the menu are several HRMS-related cards: 'HRMS SETTING', 'HRMS LEAVE', 'DESIGNATION PERMISSION', 'HR GRIEVANCE APPROVAL', 'ATTENDANCE APPROVAL', 'HR PROBATION APPROVAL', and 'HR EXPENSE'.

### Step 3: Select HRMS Leave, then select Leave Credit/Debit

Select Leave Credit/Debit and then + icon



The screenshot shows the 'HRMS Leave' interface with the 'Leave Credit/Debit' tab selected. A dropdown menu for 'Credit/Debit' is set to 'Credit'. The 'Remarks' field contains the text 'Enter Remarks' and a '+' icon. Below this is a table with columns 'Name' and 'Count'.

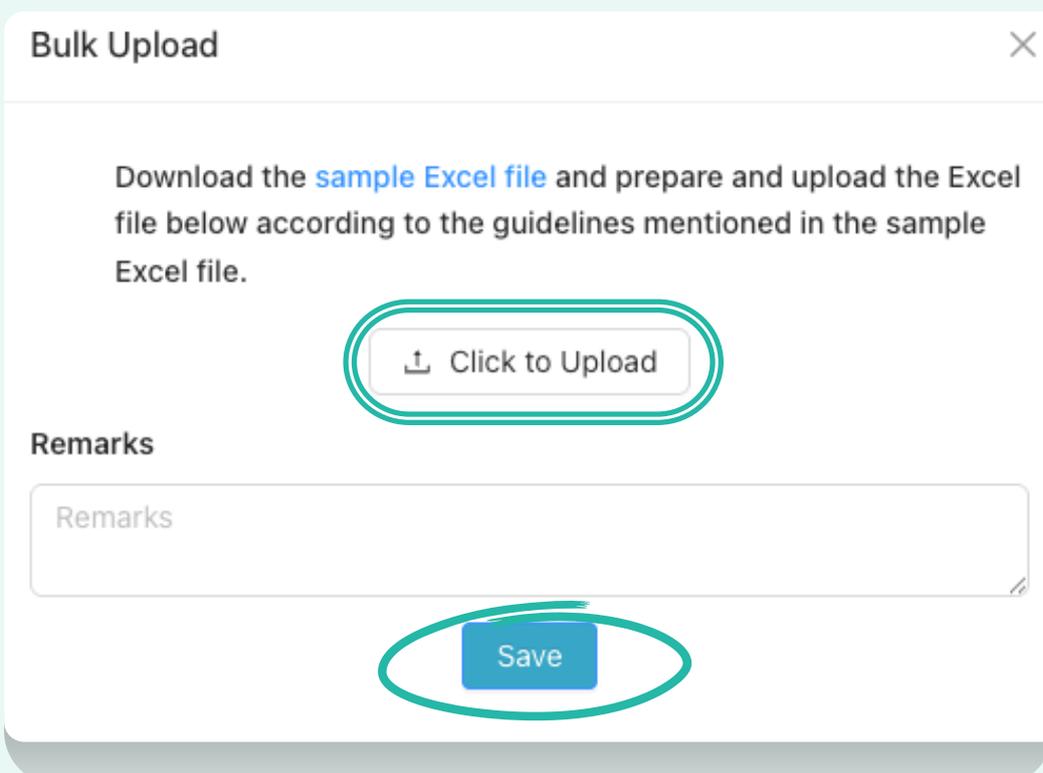
Name	Count
Good Friday	0
Leave 1	0
Leave 2	0
Leave 3	0
Leave 5	0
Leave 4	0
Casual Leave	0
Sick Leave	0

A 'Save' button is located at the bottom of the form.



### Step 4: Upload Your Sample Excel File

Click to upload your prepared Excel file, Enter Remarks (if required), then click Save. Leave allocations applied in bulk according to your uploaded file.



The 'Bulk Upload' dialog box contains the following elements:

- Text: "Download the [sample Excel file](#) and prepare and upload the Excel file below according to the guidelines mentioned in the sample Excel file."
- Button: "Click to Upload" (highlighted with a red oval)
- Text: "Remarks"
- Text input field: "Remarks" (empty)
- Button: "Save" (highlighted with a red oval)