2025 Year End User Guide | Solution Pro

1. Initialize New Year for Pro Leave

2. Initialize New Year for Pro Timesheet

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Initialize New Year for Pro Leave

Initialize New Year Procedures | Pro Leave

- You should only initialize the New Year for the Pro Leave module after completing the New Year initialization for Pro Payroll.

- If this step is not completed, employee leave entitlements for 2026 will not be created, and any unused annual leave from 2025 will not be carried over to 2026.

  If your company does not use the Leave module, ignore this process.

Initialize New Year Procedures | Pro Leave

Financial Year Leave Initialization Guidelines

- If your company uses the Financial Year method (instead of Calendar Days) for leave calculations, please follow the steps below.

Example Scenario

- <u>Leave Period</u>: The company's leave year follows the financial year, from April 2025 to March 2026.

- <u>Initialization Process</u>: The Initialize New Year process must be completed twice. First in period 202512, and again in period 202603.

Important Note Before Initialize New Year for Leave

- For customers using the Leave module, please ensure that all pending annual leave requests are approved before running the Initialize New Year process.

- Any leave requests that remain pending will not be deducted from the employee's annual leave balance.

- If you previously ran the Initialize New Year process in 2025, it is strongly recommended that you run the process again in January 2026 after approving all outstanding 2025 leave records.

- This ensures that the system recalculates carry-forward leave balances accurately.

Initialize New Year

Initialize New Year Procedures | Pro Leave

1 Open the URL for Solution Pro.

2 Log in to the database where you want to perform the Initialize New Year for Leave.

3 Log in as **'ADMIN'** or **any login ID** with permission access to the initialize function.
The login ID used for Initialize New Year should have access to all employees

4 Choose the period for '**202512**'.
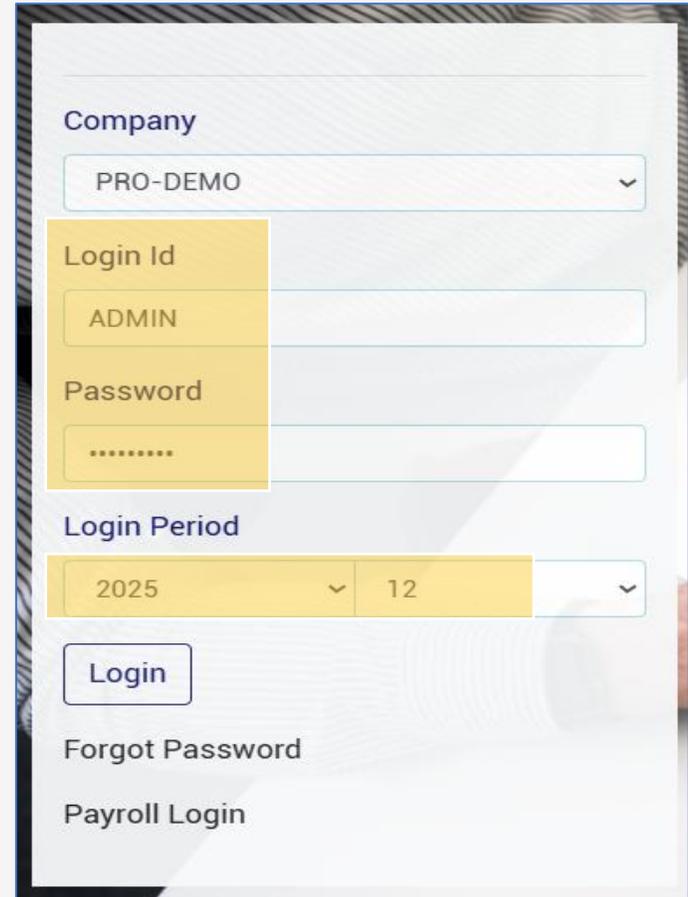
Company

PRO-DEMO

Login Id

ADMIN

Password

••••••••

Login Period

2025   12

Login

Forgot Password

Payroll Login

Initialize New Year Procedures | Pro Leave

5 Navigate to 'Leave → Enterprise → **Initialize New Year**'.

Initialize New Year Procedures | Pro Leave

6   Ensure that the Initialize Year is shown as '**2026**'.

Initialize New Year Procedures | Pro Leave

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- Choose the '**Carry forward leave methods**' according to your company's policy.

- If you allow employees to apply for leave in 2026 before closing 2025, it is recommended to use the "**None**" method. This helps avoid issues if an employee applies for leave in 2025 after the carry-forward process.

Initialize New Year Procedures | Pro Leave

8 For the **'Department'** and **'Employee'** options, keep the setting as **'ALL'** unless you intend to initialize for a specific department or employee.

Initialize New Year Procedures | Pro Leave

9

- Select the **Tick All** checkbox **only** during the first initialization.

- Click "**Copy**" to duplicate the Leave Settings from 2025 to 2026.

- Click "**Process**" to start the leave initialization.

Initialize New Year Procedures | Pro Leave

10 Initialization of the new year is in progress.

Note that the processing time may vary depending on the size of your database. Please DO NOT close the browser or navigate to another page.
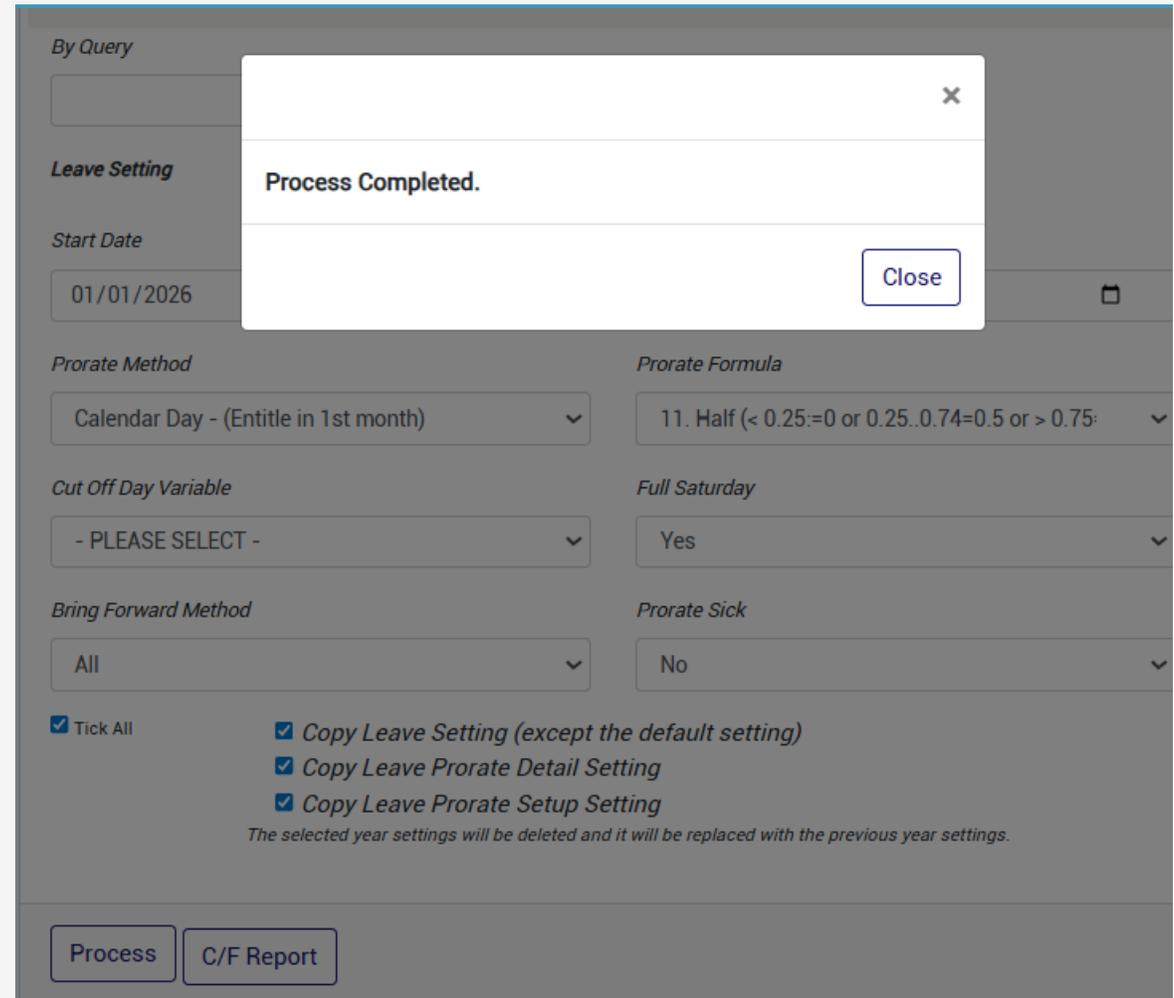
Initialize New Year Procedures | Pro Leave

11 After completing the process, a message will appear.

Leave Calculation

Initialize New Year Procedures | Leave Calculation
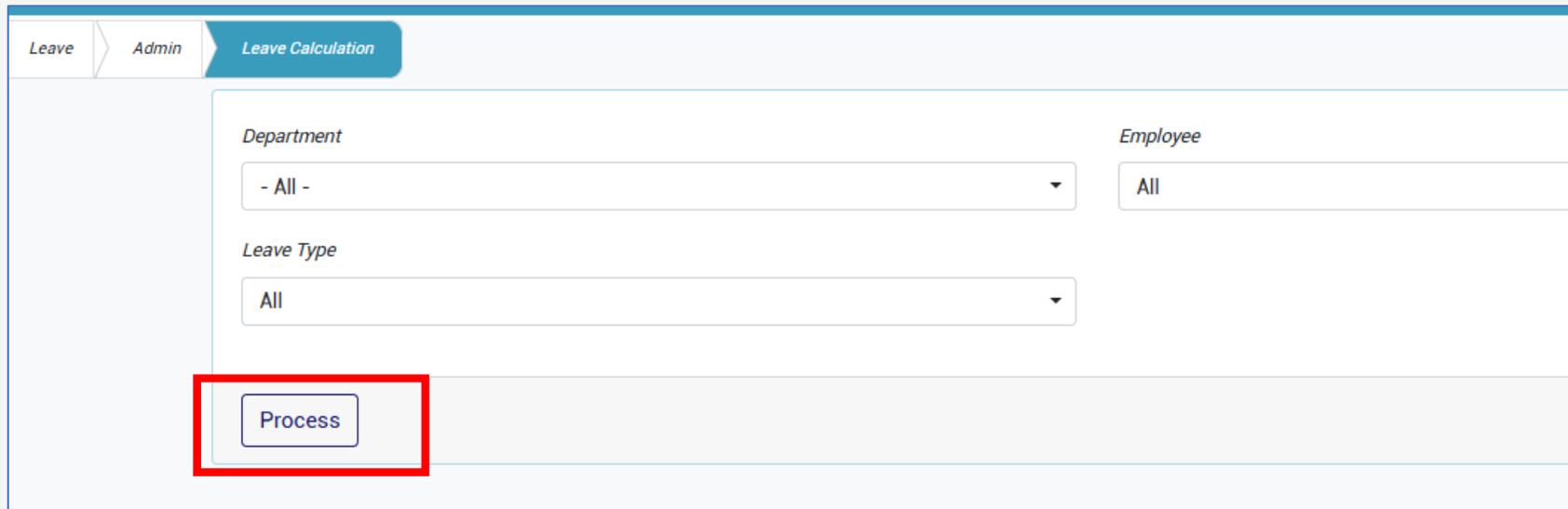
▪ After completing the leave initialization, it is essential to run the **'Leave Calculation'** process.

▪ Navigate to 'Leave → Enterprise → **Leave Calculation**'. Note: Login year must be 2026.

Initialize New Year Procedures | Leave Calculation

- Keep the settings as **'ALL'** for Department, Employee, and Leave.

- Next, click **'Process'** to start the leave calculation process.

Initialize New Year Procedures | Leave Calculation

Please note that the processing time may vary depending on the size of your database. DO NOT close the browser or navigate to another page during the processing.

You can proceed to 'Leave Entitlement' to check the data after the process is completed
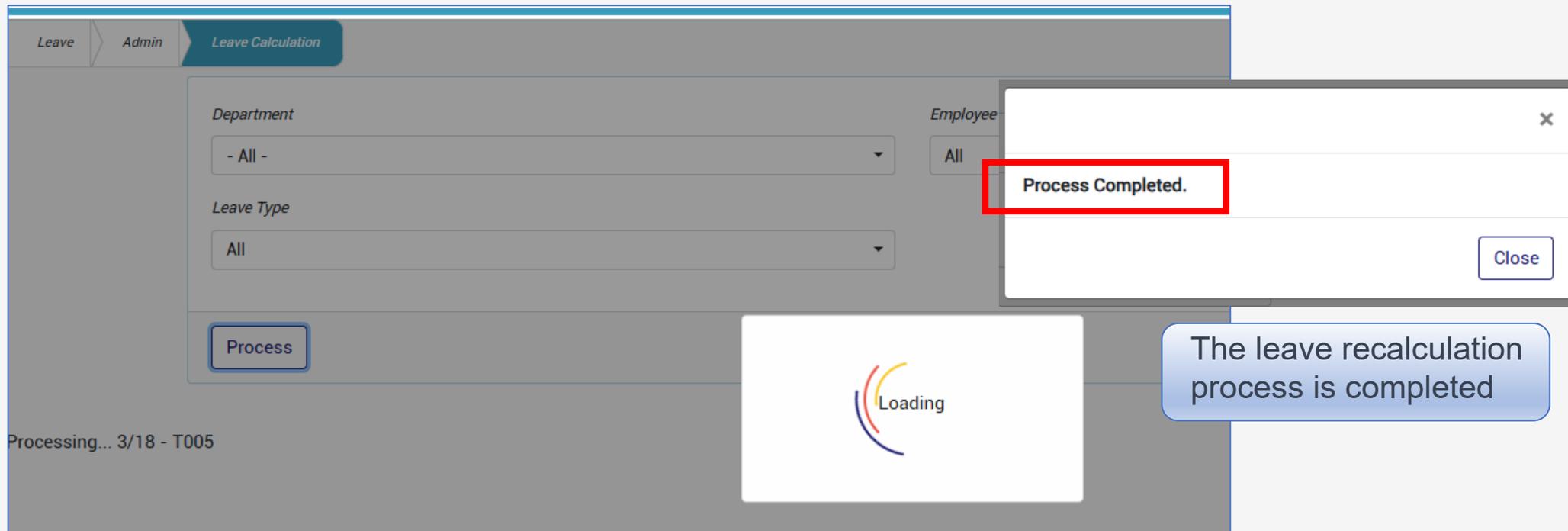
The leave recalculation process is completed

Initialize New Year Procedures | Leave Entitlement

To confirm the completion of the 'Initialize Leave' process:

Navigate to 'Leave → HR → **View Entitlement**'.
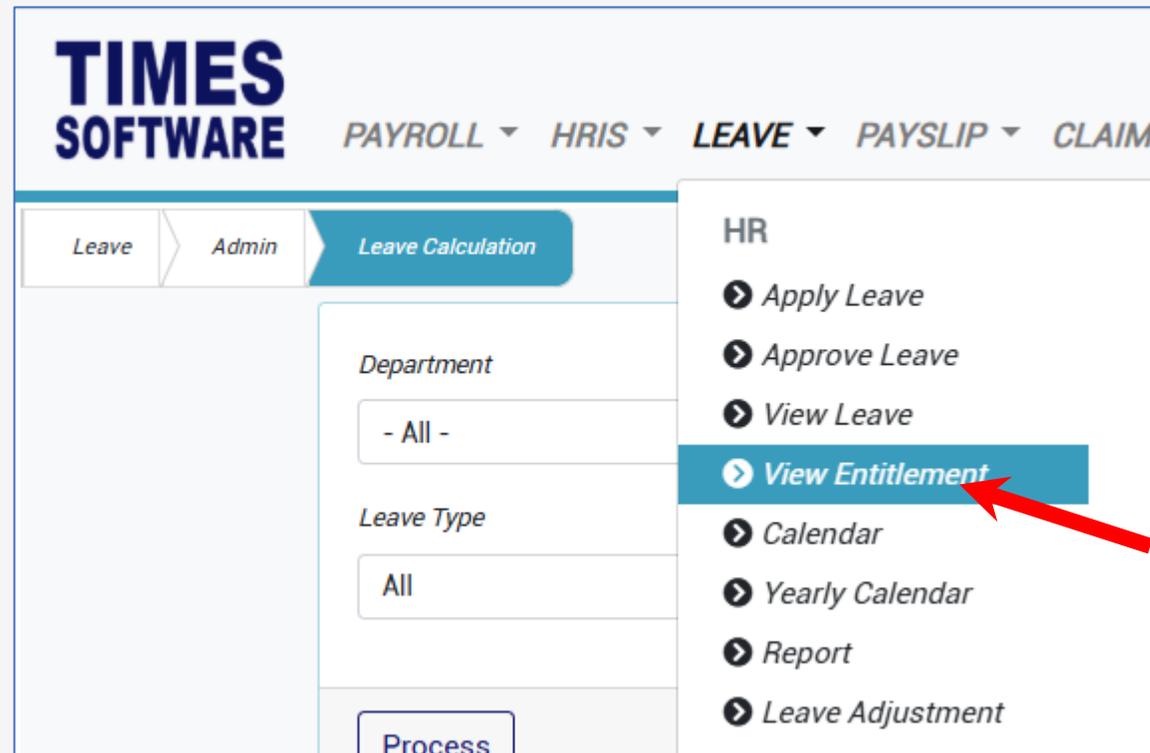
Initialize New Year Procedures | Leave Entitlement

Example: Leave entitlement of the '**ANNU**' leave code.

Public Holidays Setup

Initialize New Year Procedures | Public Holidays Setup

- The system adds **2026** public holidays for KL/National only.
- If you have other **'Public Holiday'** types, you will need to set them up manually.
- Navigate to 'Leave → Administrator → **Public Holiday Setup**'.
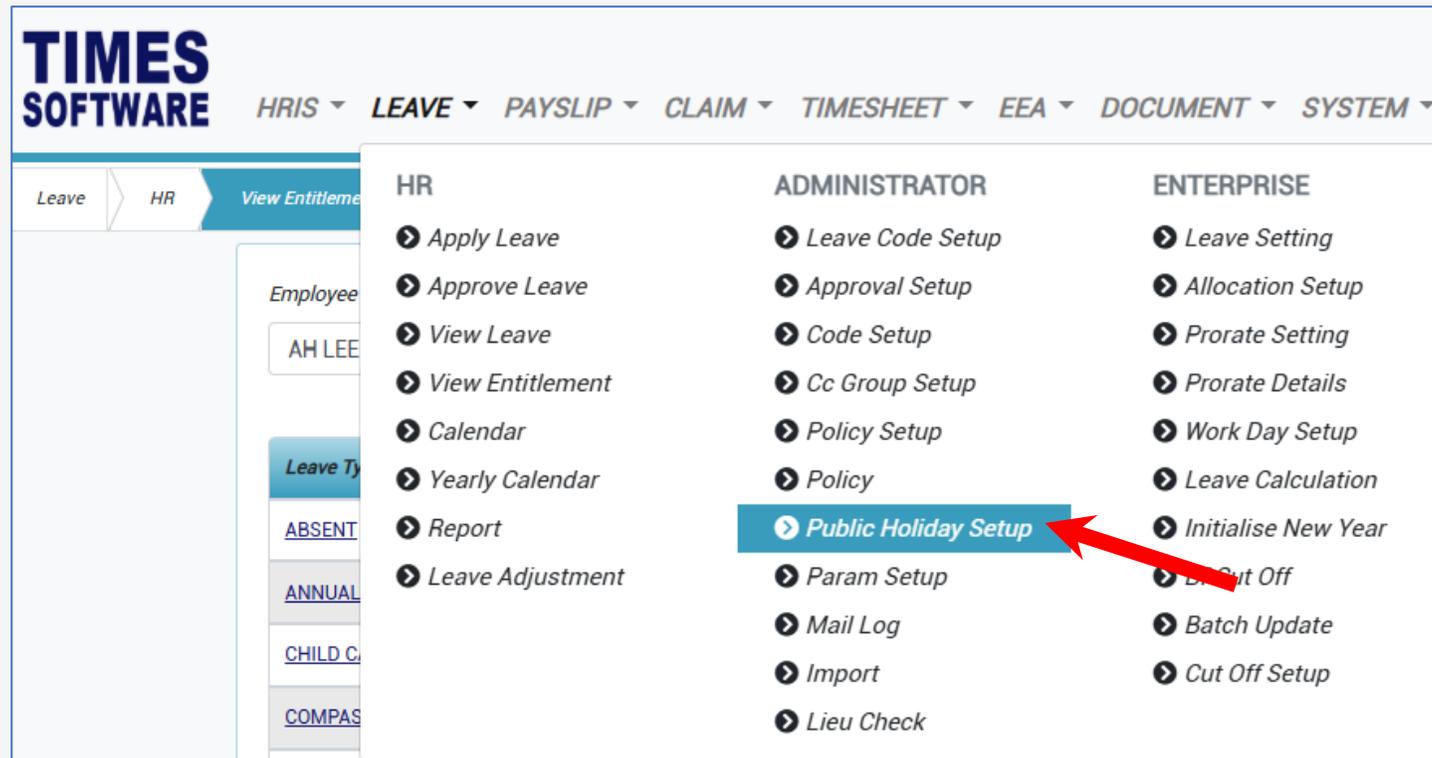
Initialize New Year Procedures | Public Holidays Setup

1 Choose the 'Year' as '**2026**'.

2 You can use the '**Copy**' function to duplicate the public holidays from one to another.

Source:
Choose the code to **copy from**.

Blank "State" refers to the KL/National public holidays added by the system.

Target:
Choose the code to **copy to**.

After duplicating, you can make any necessary amendments.

Public holidays without an assigned 'Holiday Table' code are the default list added by the system

Initialize New Year Procedures | Public Holidays Setup

To check if an employee is assigned a **Holiday Table** code:

Navigate to 'Payroll → EMS → Employee → **Leave/Benefit**' tab.

Carry Forward Leave Methods

Initialize New Year Procedures | Carry forward leave methods

The following Carry Forward Leave Methods are available in the system.

Initialize New Year Procedures | Carry forward leave methods

1. **All (balance leave)**
   - This option carries forward ALL annual leave balances to the following year, ensuring that employees retain their unutilized leave from the previous year.

Initialize New Year Procedures | Carry forward leave methods

2. **One year (without B/F)**
   - Only the unutilized Earned Leave from the current year is carried forward.
   - Any leave left from the previous year (2024) is forfeited.
   - If the 2024 B/F is equal to or greater than the leave taken in 2025, the carry forward to 2026 will match the 2025 leave entitlement.

Example:

2024 B/F: 3 days
2025 YTD Taken: 2 days
2025 YTD Entitlement: 13 days
Carry forward to 2026: 13 days

Current Year	Full: 13	B/F: 3	Adjust: 0	Forfeit: 0	Entitle: 13	Total: 16	Taken: 2	Balance: 14
Following Year	Full: 14	B/F: 13	Adjust: 0	Forfeit: 0	Entitle: 1	Total: 14	Taken: 0	Balance: 14

Initialize New Year Procedures | Carry forward leave methods

3. **Maximum days C/F (manual)**

- This option carries forward leave based on the user-defined number of days or the actual annual leave balance, whichever is lower.

Leave	Admin	Initialise New Year

Year	Method
2026	Maximum days C/F (manual)

Maximum carry forward
6

| Scenario #1	Scenario #2
Annual Leave Balance = 6 days	Annual Leave Balance = 4 days
Max Carry Forward = 6 days	Max Carry Forward = 6 days
B/F in the following year = **6 days**	B/F in the following year = **4 days**

Expected results based on the above setting.

The system carries forward **6 days** to 2026, despite the 2025 balance being 14 days.

Current Year	Full: 13	B/F: 3	Adjust: 0	Forfeit: 0	Entitle: 13	Total: 16	Taken: 2	Balance: 14
Following Year	Full: 14	B/F: 6	Adjust: 0	Forfeit: 0	Entitle: 1	Total: 7	Taken: 0	Balance: 7

Initialize New Year Procedures | Carry forward leave methods

4. **Maximum days C/F (allocation)**

   ▪ This option carries forward leave based on a pre-defined value (days) specified in the Leave → Enterprise → Allocation Setup → **BF**' column.
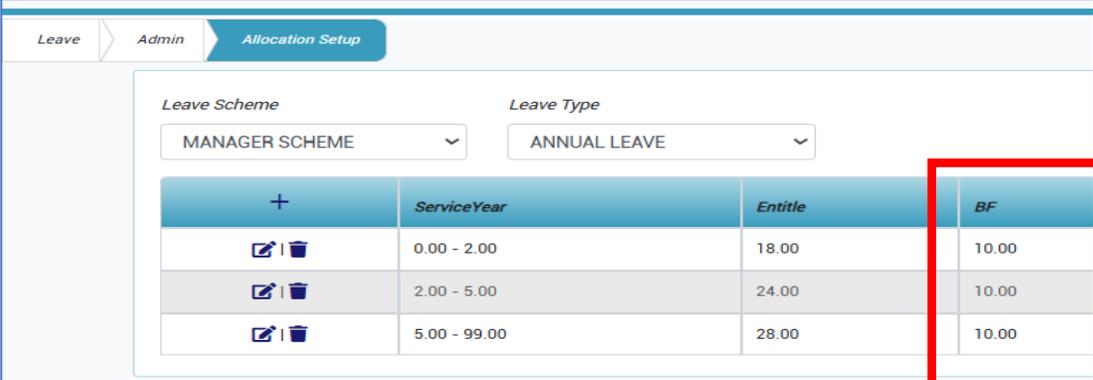
Expected results based on the above setting.

The system carries forward **10 days** to 2026, despite the 2025 balance being 14 days.

Initialize New Year Procedures | Carry forward leave methods

5. **Maximum days C/F (by percentage)**

    ▪ This option carries forward leave based on a pre-defined value (%) specified in the 'Leave → Enterprise → Allocation Setup → **BF**' column.

The value setup in the "BF" column relates to a percentage.

Expected results based on the above setting.

The system carries forward **<u>1.3 days</u>** to 2026, despite the 2025 balance being 14 days.

Initialize New Year Procedures | Carry forward leave methods

6. **None**

- Any unused annual leave from the current year will not be carried forward to the next year. It will be forfeited.

- The B/F in the following year's leave record will display '0', indicating no unused leave has been carried forward.

Current Year	Full: 13	B/F: 3	Adjust: 0	Forfeit: 0	Entitle: 13	Total: 16	Taken: 2	**Balance: 14**
Following Year	Full: 14	B/F: 0	Adjust: 0	Forfeit: 0	Entitle: 1	Total: 1	Taken: 0	Balance: 1

2

Initialize New Year for TIMES Timesheet

Initialize New Year Procedures | TIMES Timesheet

- You should only initialize the New Year for the TIMES Timesheet module after completing the New Year initialization for ePAYROLL.

- Failure to complete this step will prevent the creation of employees' shift schedules for 2026.

  If your company does not use the Timesheet module, ignore this process.

Initialize New Year Procedures | TIMES Timesheet

1 Open the URL for Timesolution.

2 Log in to the database where you want to perform the Initialize New Year for Timesheet.

3 Log in as **'ADMIN'** or **any login ID** with permission access to the initialize function.
The login ID used for Initialize New Year must have access to all employees

4 Choose the period for '**202601'**.
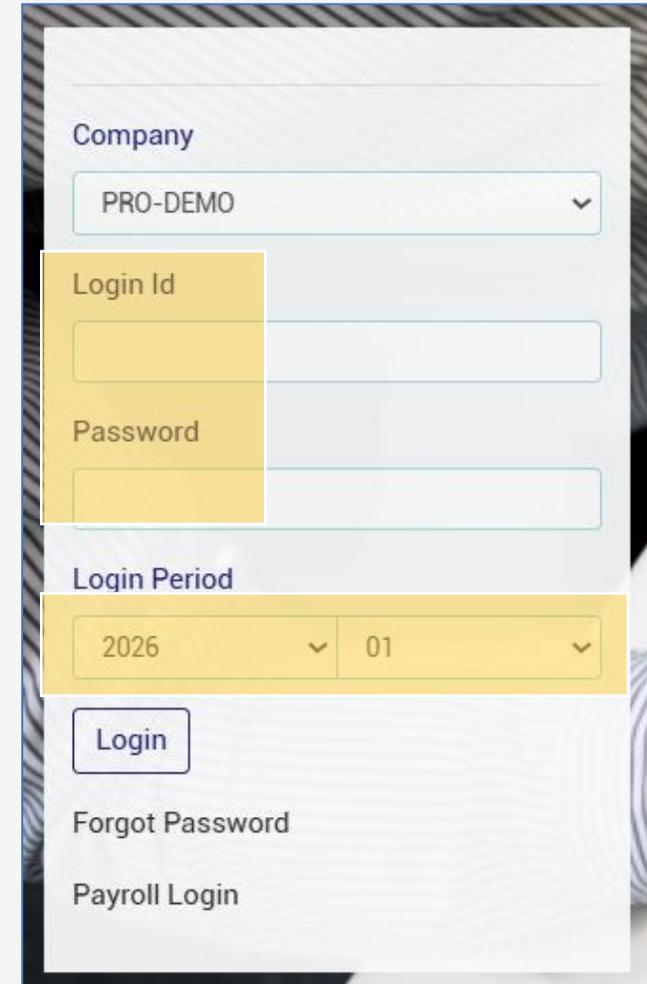
Initialize New Year Procedures | TIMES Timesheet

5 Navigate to 'Timesheet → Administrator → **Shift Schedule**'.

Initialize New Year Procedures | TIMES Timesheet

6 Ensure **Start Date and End Date is 01/01/2026 and 31/12/2026** respectively.

Select ⬜ to tick for all employees. Next, click "**Process**" to start the Timesheet initialization.

Initialize New Year Procedures | TIMES Timesheet

Note:

If you have more than 20 employees, you may consider changing the display record to a higher number, e.g., 100.

Initialize New Year Procedures | TIMES Timesheet

7 Processing in progress.

Note that processing times may vary, depending on the size of your data.

Do not close the browser or navigate to another page during the processing.

Initialize New Year Procedures | TIMES Timesheet

8 If the list of employees spans more than 1 page, repeat the initialization shift scheduling on each page.

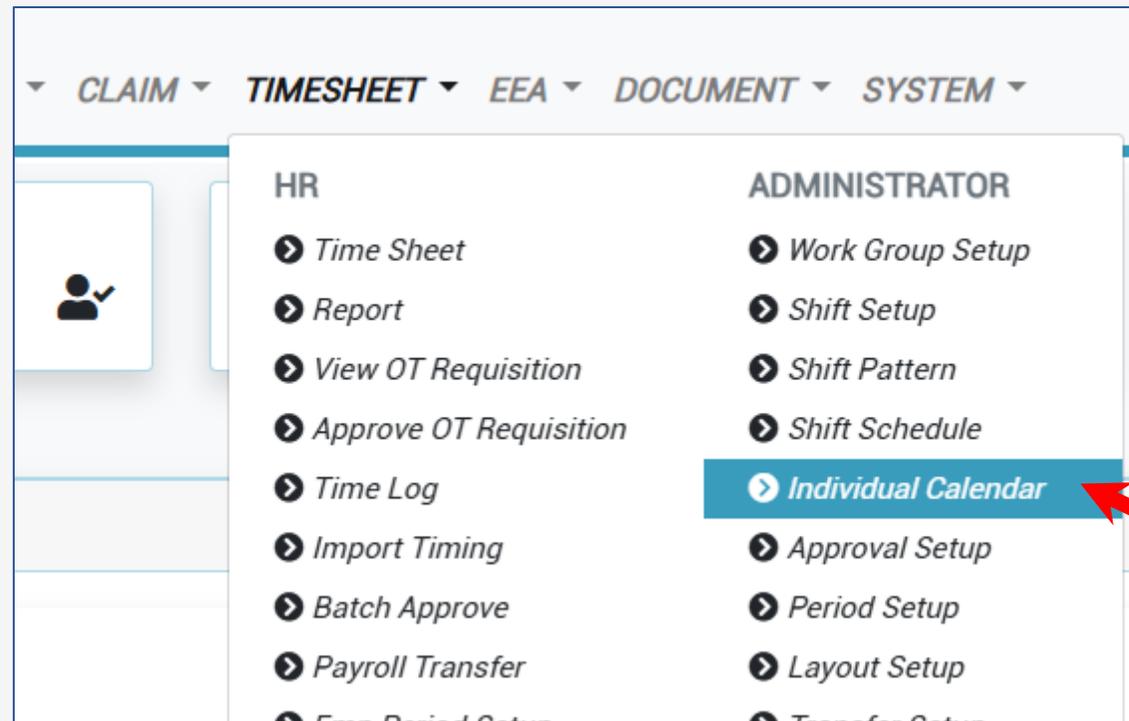# Initialize New Year Procedures | TIMES Timesheet

9 ▪ Now that the Timesheet initialization for 2026 is complete, it is advisable to perform a random check to verify its status.

▪ Navigate to 'Timesheet → Administrator → **Individual Calendar**'.

Initialize New Year Procedures | TIMES Timesheet

10

- Choose the employee code.

- Set the date range from **01/01/2026 to 31/12/2026**.

- Click **'Save'**, then click **'Query'**.

- The system will display the employee list for the selected date range.

- Verify that the **'Workgroup'** and **'Shift'** fields contain the expected data. If the data is in order, the Timesheet initialization process is complete.

TimeSheet	Admin	Individual Calendar	

Employee	Start Date	End Date
AHMAD BIN YUSUF 🔍	01/01/2026	31/01/2026

🔍 Query   **💾 Save**

Date	Week Day	Work Group	Shift
01/01/2026	Thu	OFFICE	OFFICE
02/01/2026	Fri	OFFICE	OFFICE
03/01/2026	Sat	OFFICE	OFF DAY
04/01/2026	Sun	OFFICE	OFF DAY
05/01/2026	Mon	OFFICE	OFFICE
06/01/2026	Tue	OFFICE	OFFICE
07/01/2026	Wed	OFFICE	OFFICE
08/01/2026	Thu	O	CE

'Work Group' and 'Shift' must not be empty