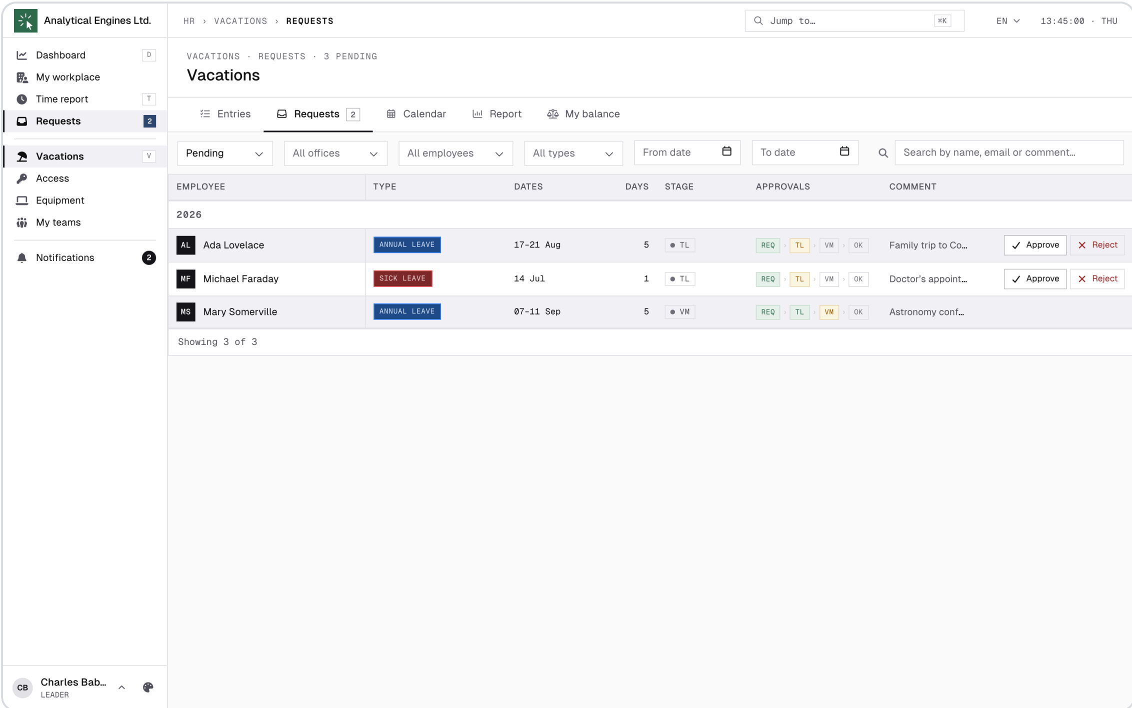
HR|Click

Team Lead Guide

Approving your team's leave — the first stage



For **team leads.** It builds on the Employee Web Guide — everything there applies to you too.

Applies to HR.Click Web · Document v1.1 · August 2026

Leading a team

1 Being a team lead

Team lead isn't a role toggle — it comes from your **team**: whoever carries the "Leader" mark on a team leads it (set by administrators in Teams). With it you get:

- **Requests** in the sidebar — leave requests waiting for **your** stage, with a count badge (appears only while something is pending).
- Names on the **Vacations → Calendar** — you see who exactly is away, not just anonymous bars.
- A team-scoped Dashboard view with the pending-approvals panel.
- Notifications when your people request leave — or check in late.

WHERE YOU FIT IN THE FLOW

Each vacation type defines its approval path. When it includes the team lead, requests from your team stop at the **TL stage** first — after you approve, they continue to the vacation manager (if the type requires it) or become approved. You can't approve your own requests; another approver handles those.

2 Approving your team's leave

Requests lists what's pending, each row showing the requested type by its own icon and colour. Act on rows with the **TL** chip — rows showing **VM** have already passed you and sit with the vacation manager (no buttons for you). Filter the list by status, employee or leave type — and by team, if you lead more than one. Opening the page with nothing left to approve takes you to **Entries** with a note that it has already been handled, instead of a dead page; a queue you have filtered down to nothing yourself just stays empty.

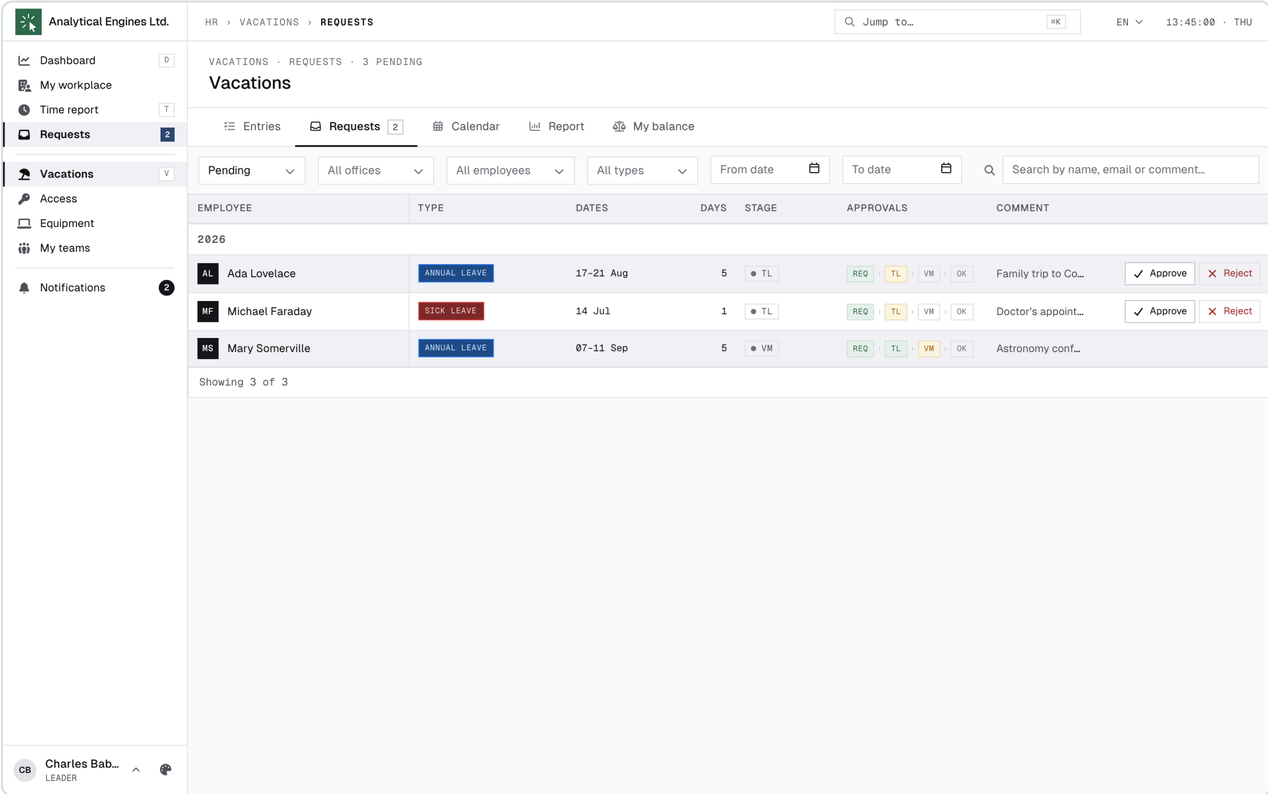


Figure 1 — The queue — you act on TL rows; VM rows are past your stage.

- **Approve** — confirm with an optional note (**Approve as TL**). Unlike the vacation manager, you **can't change the leave type** — that decision is made at the VM stage.
- **Reject** — terminal; add a reason so the employee knows what to fix (it reaches them word-for-word).
- **Flagged** rows (over a limit, short notice, would overdraw the balance) are on a timer — decide before the deadline in the badge, or the system auto-rejects them. A few leave types are set up to skip this and just keep reminding you instead — even an ordinary, unflagged request left too long can auto-approve itself, except on those same types.

Before approving, glance at the **Calendar** — names are visible to you, so team overlaps are easy to spot. The employee is notified automatically at every step.

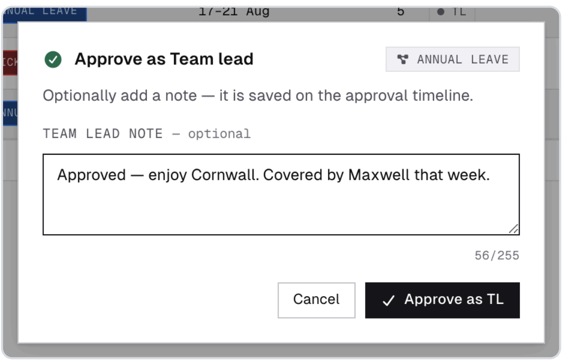


Figure 2 — Approve as Team lead — a note, but no type change.

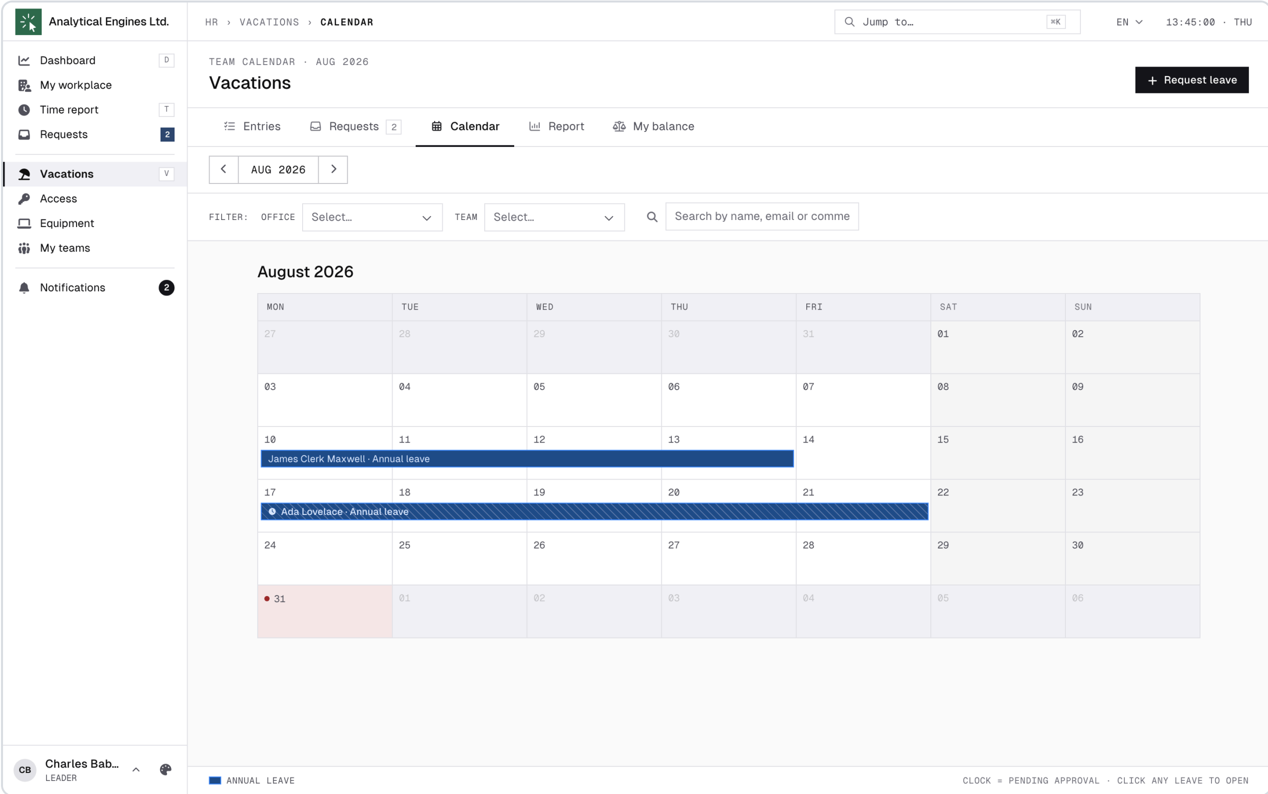


Figure 3 — The calendar with names — check overlaps before approving.

3 Your team's leave, at a glance

Two more tabs open up for you, both scoped to **your team** — the people on teams you lead, plus yourself. Nobody else appears, whatever you type in the address bar.

Report — the year on one page

Vacations → Report is a matrix: one row per team member, one column per leave type, plus totals and the current balance. Cells show used leave as working days; a **+N** marks requests still pending in that window. Click a cell to see the leaves behind the number.

- Set the period with **From** / **To** and press **Apply** — the default is the current calendar year.
- **Team** narrows to one of your teams if you lead several; **Office** narrows within them.
- The search box *filters* the table down to matching people, with a "N of M people" counter — click a name to focus that row and dim the rest.
- **Export XLSX** downloads the same matrix as a spreadsheet, again for your team only.

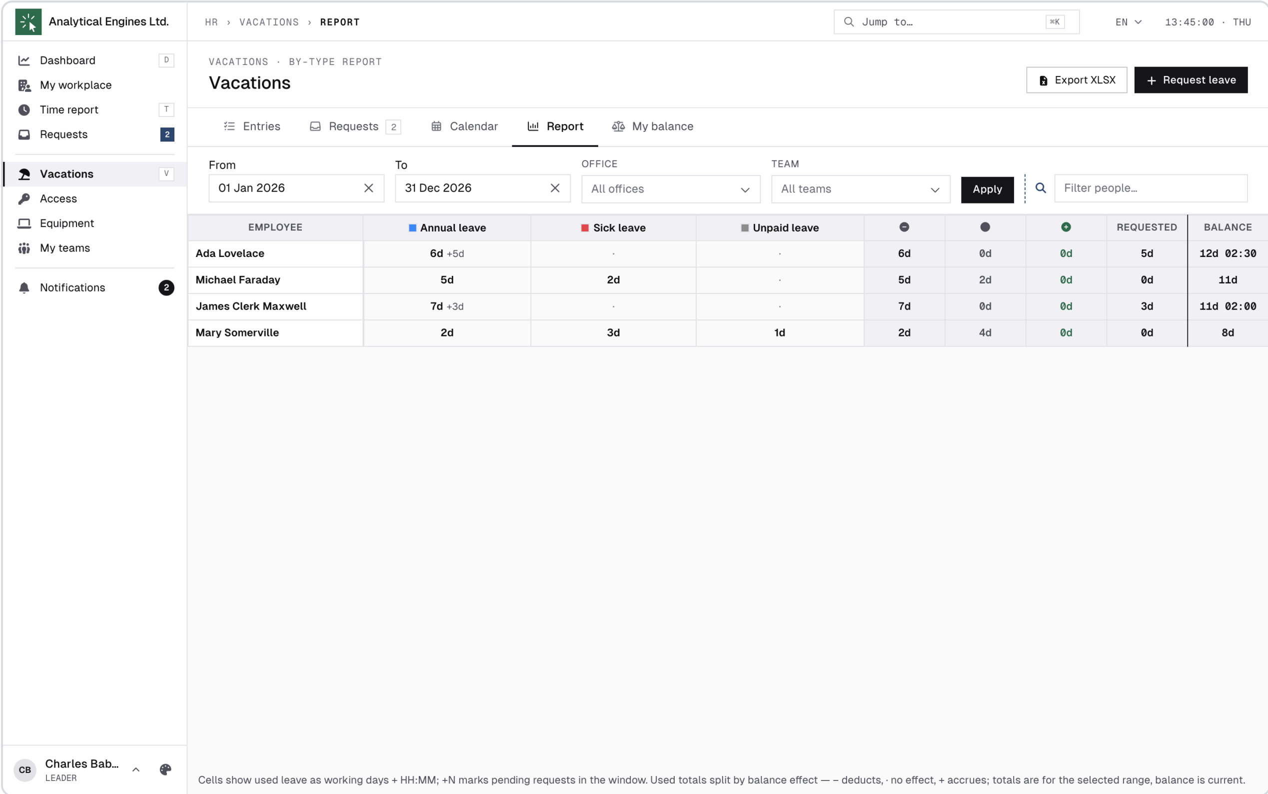


Figure 4 — The by-type report — days used per leave type, with totals and the current balance.

Balances — how much is left

Vacations → Balances answers the question you actually have while approving: *can this person afford it?* Pick a team member in **Employee** and you get their available balance, what has accrued, what has been used, and the full statement of every accrual and deduction. **Year report** saves it as a PDF.

The same figure also rides along in the request itself, so during approval you see the balance without leaving the dialog.

> **READ-ONLY**
>
> You can **look at** your people's balances, not change them. Manual corrections — adding or removing days by hand — are the vacation manager's job.

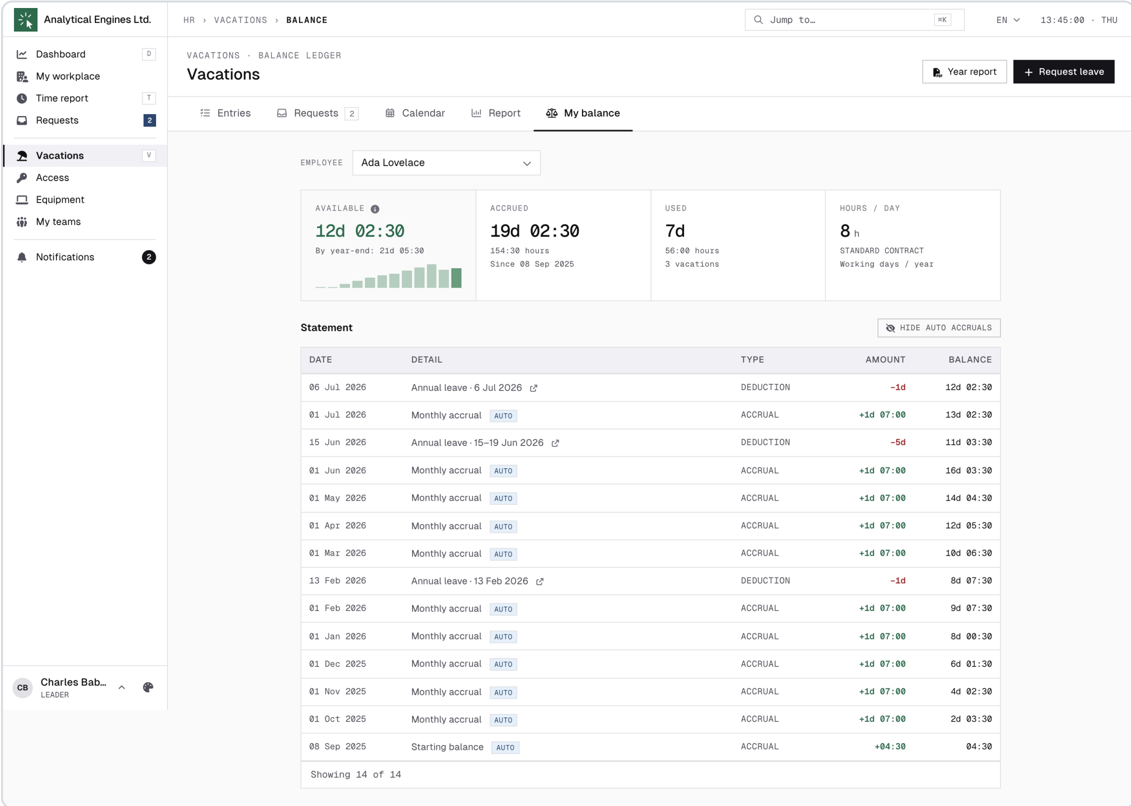


Figure 5 — The balance statement: the running total, then every accrual and deduction behind it.

> **PRIVACY**
>
> Leave is personal data. You see it for the people you lead because you decide on their requests — not for the rest of the company. Sick-leave days show as their own column, so treat the report as confidential.

4 What you’re notified about

SUBJECT / TITLE	WHEN
Leave request awaiting approval	Someone in your team requested leave that needs your stage.
Leave request needs manual approval	A flagged request — includes the auto-reject deadline.
Leave request needs a decision	Reminder while a flagged request still waits (every ~8 h).
“<Name> checked in late”	A team member checked in after their shift started — visibility, no action required in the app.

E-mails arrive within a few minutes and use the same titles as the in-app notifications; tune the channels in **Notifications → Preferences**. Time corrections and self-reported hours are handled by *time managers* — if a team member’s hours look wrong, point them to “Log time” (Employee Web Guide) or escalate to your time manager.

HR.Click — Team Lead Guide · v1.1 · August 2026. Product screens shown with sample data; names of persons are fictitious examples.