

Ensure Accurate Client Billing and Simplify Leave Audit with Highly Customized Empxtrack Leave Management System



This case study is about a leading U.S. based IT company with more than 2500 employees. The company offers a wide range of technology solutions, including Mobile Services, IoT & Analytics, Digital Strategy, Brand and Marketing, Cloud & Managed Services, and more.

THE CHALLENGE

The client recorded employee work hours through timesheet and used Empxtrack to manage their leave records. However, employees used to mark their leave in both the systems, but Empxtrack was primarily used for leave auditing. Identifying the number of employees who have marked wrong leave in any of the two systems was necessary for the audit. The company conducted leave audit to ensure accurate client billing, identify leave balances for each individual and process leave encashment correctly.

Initially, there were numerous discrepancies in the leave records in timesheet and Empxtrack, making it difficult for the organization to ensure accuracy in both the systems.

Inaccurate tracking of employees' leave data resulted in loss of profits and led to several other challenges:

- Lack of visibility in leave records and available leave balances.
- Difficulty in identifying number of employees and their work hours spent on a specific project.
- Inaccurate project related data produced at the time of billing, led to increased errors in billing.

A highly customized solution was needed to ensure that the leave records in the employee timesheet remain in sync with that of Empxtrack Leave System. The search for a custom-made tool began with an aim to resolve the challenge.

SOLUTION

The company needed a highly customizable and configurable solution to quickly audit leave data. The client evaluated dozens of systems, but those products could not meet their complex customization requirements and were prohibitively expensive. Soon the client discussed these challenges with Empxtrack team.

Empxtrack's implementation team came up with a customized solution that could help in identifying discrepancies of the leave and timecard data. The accuracy in client billing was ensured in few steps:

The client provided Timecard data to Empxtrack in the below format.

Employee ID	Employee Name	Status	Time Period Ending Date	Leave Type	Date	Hours	Timecard Status	Approver	Approver Name
210012	Ana Trujillo	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220001	John Smith
210015	Anabela Dominques	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220148	John Steel
210040	Annette Roulet	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220292	Joseph Manyard
210047	Barbara Walker	ACTIVE	15-06-2018	SICK & CASUAL LEAVE	04-06-2018	8	Processed	220138	Karin Josephs
210050	Baron Inne	ACTIVE	15-06-2018	SICK & CASUAL LEAVE	15-06-2018	8	Processed	220250	Kathleen Oliver
210053	Bobby Deigo	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220193	Keith Reverbel
210079	Bunha Faun	ACTIVE	15-06-2018	SICK & CASUAL LEAVE	08-06-2018	8	Processed	220280	Keith Russell Keith
210079	Bunha Faun	ACTIVE	15-06-2018	MATERNITY LEAVE	15-06-2018	8	Processed	220280	Keith Russell Keith
210070	Carine Schmitt	ACTIVE	15-06-2018	VACATION	12-06-2018	8	Processed	220280	Terri Osborn
210115	Dug Probamale	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220269	Kurt Dewer
210167	Dwit Reston	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220287	Terri Osborn
210185	Eduardo Saavedra	ACTIVE	15-06-2018	SICK & CASUAL LEAVE	09-06-2018	8	Processed	220030	Thomas Hardy
210195	Elizabeth Lincoln	ACTIVE	15-06-2018	HOLIDAY	01-06-2018	8	Processed	220148	John Steel

Empxtrack team created a method to upload given data in a specific format.

UPLOADS	EMPXTRACK FIELDS	USER FIELDS
> Employee data	Employee ID	Employee ID
> Reporting relationships	Employee Name	Employee Name
> Confidential IDs	Status	Status
> Current address	Time Period Ending Date	Timesheet Period End Date
> Permanent address	Leave Type	Leave Type
> Emergency contact	Date	Date
> Qualification	Hours	Hours
> Certification	Timecard Status	Timecard Status
> Employee dependents	Approver	Approver
> Employee Exit Data	Approver Name	Approver Name
> Salary breakup		
> Employee salaries		
> Upload CTC Reimbursement Data		
> Upload Investment Data		
> Download Investments		

The timecard file was uploaded, and each field & data was verified to make sure that the user had entered expected values in the uploaded file. After confirmation, the database was updated.

The leave data file for the same month was selected and the report was generated to audit leave data.

Confirmation Message

Record updated successfully.

PLEASE SELECT MONTH AS PER UPLOADED SHEET TO GENERATE REPORT.

Month

June

Generate Report

Download Excel

Done

The generated report highlighted discrepancies between Empxtrack and timecard data in 4 cases:

1. Leave record was available in Empxtrack, but not found in timecard.
2. Leave record was available in timecard, but not found in Empxtrack.
3. Leave records were found in both systems, but leave types were different.
4. Leave records were found in both systems, but time was mismatched.

Emp No.	Emp Name	Date	Empxtrack Leave Type	Empxtrack	Timesheet Leave Type	Timesheet	Manager Name	
210012	Ana Trujillo	28-06-2018	MATERNITY LEAVE	8	N/A	N/A	John Smith	CASE-1
210015	Anabela Dominques	02-06-2018	SICK & CASUAL	8	N/A	N/A	John Steel	
210040	Annette Roulet	27-06-2018	COMPENSATORY LEAVE	8	N/A	N/A	Joseph Manyard	
210047	Barbara Walker	28-06-2018	MATERNITY LEAVE	8	N/A	N/A	Karin Josephs	
210050	Baron Inne	05-06-2018	SICK & CASUAL	8	N/A	N/A	Kathleen Oliver	
210053	Bobby Deigo	02-06-2018	VACATION	8	N/A	N/A	Keith Reverbel	
210079	Bunha Faun	04-06-2018	N/A	N/A	SICK & CASUAL	4	Keith Russell Keith	CASE-2
210079	Bunha Faun	15-06-2018	VACATION	8	SICK & CASUAL	8	Keith Russell Keith	
210070	Carine Schmitt	15-06-2018	VACATION	8	SICK & CASUAL	8	Terri Osborn	
210115	Dug Probamale	25-06-2018	N/A	N/A	SICK & CASUAL	8	Kurt Dewer	
210167	Dwit Reston	10-06-2018	FLOATING HOLIDAY	8	SICK & CASUAL	8	Terri Osborn	CASE-3
210185	Eduardo Saavedra	11-06-2018	SICK & CASUAL	8	VACATION	8	Thomas Hardy	
210195	Elizabeth Lincoln	16-06-2018	VACATION	4	VACATION	8	John Steel	CASE-4

Through the automation and the customization of the product, the client could now reduce number of discrepancies in timecard and Empxtrack leave management system.

BENEFITS

During the compliance audit to crosscheck employee work hours, it became easy to –

- Validate employee leave data and employee work hours.
- Save time and effort. A huge number of leave records needed to be analysed every month which was a time-consuming process. Automation made the process quick and effortless.
- Track employee work hours. The client used Empxtrack leave module for continuously tracking employee work hours. Generated employee salaries accurately.
- Reduce time taken for submission of time sheets and invoices to customers.

Disclaimer: Name of the employees have been changed in the above images due to confidentiality of the contract.