

Simply Personnel Personnel Manager

A Guide for Holidays

Simply Personnel: Holidays

This document provides step-by-step guide for users to give an easy understanding on setting up your system to record holidays and putting this into use on your employee records.

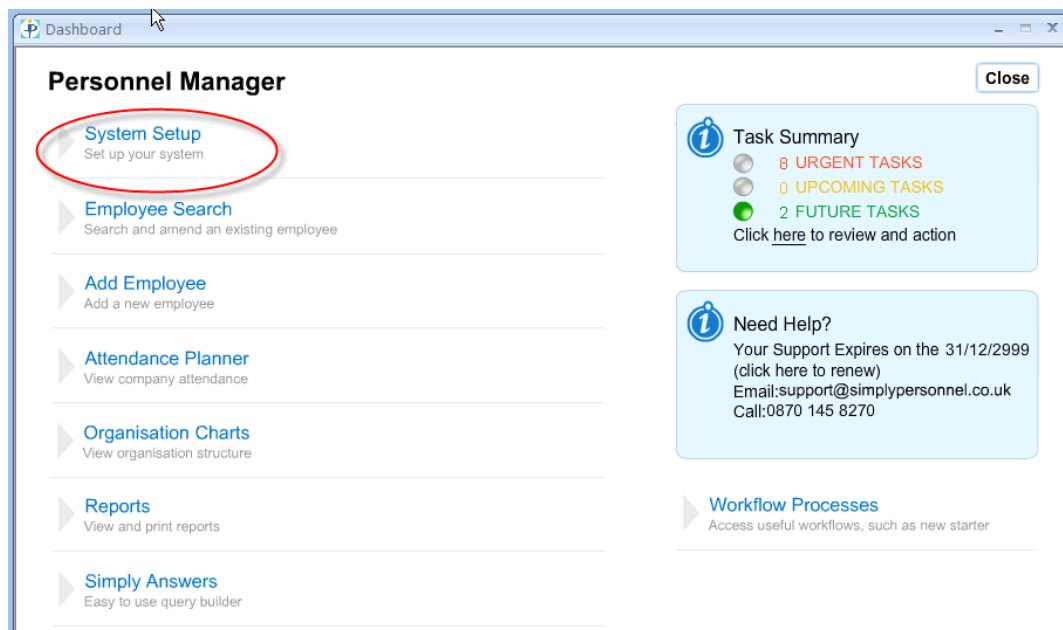
If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

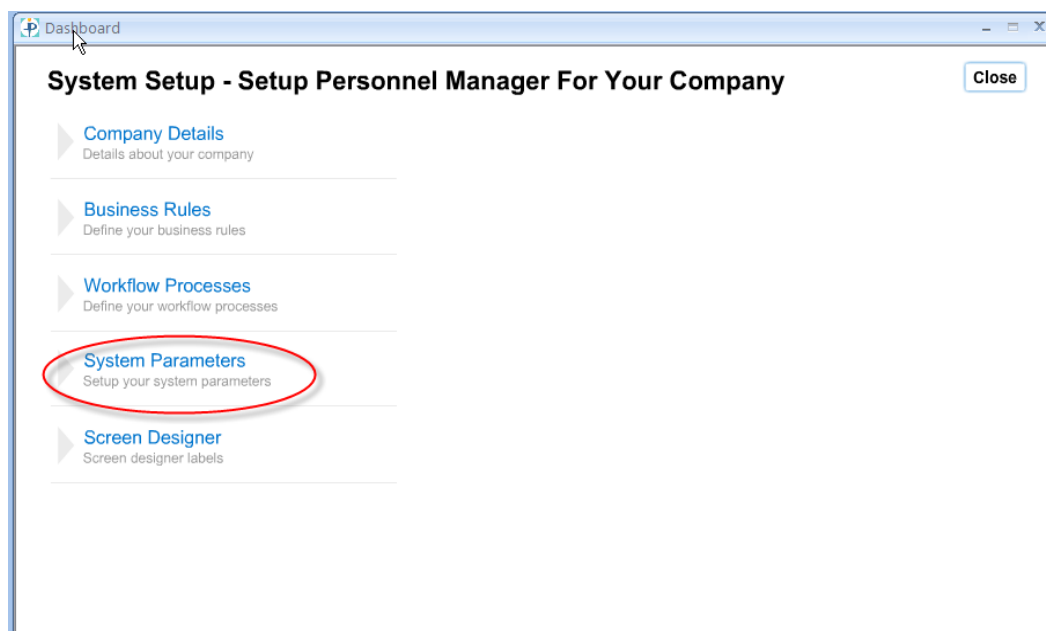
The Simply Personnel Team.

Setting up your Holidays:

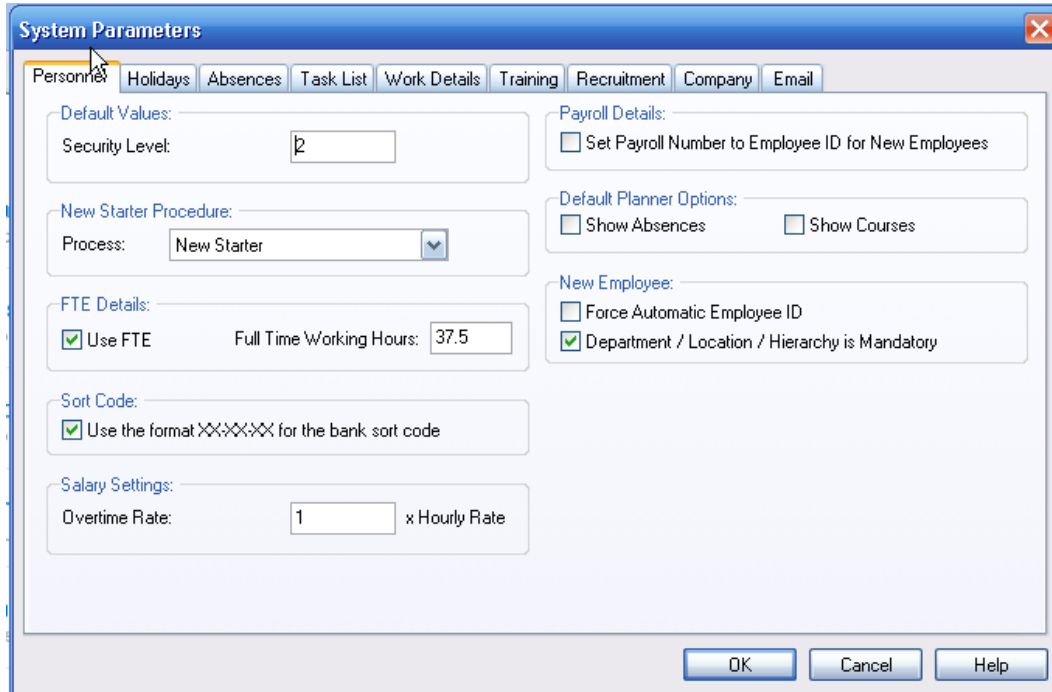
To ensure that holidays will be recorded correctly on your employee records you must first go through the system set up.



Then click on System Parameters,



This will open up the following screen,



System Parameters

Personnel | Holidays | Absences | Task List | Work Details | Training | Recruitment | Company | Email

Default Values:
Security Level: 2

New Starter Procedure:
Process: New Starter

FTE Details:
 Use FTE Full Time Working Hours: 37.5

Sort Code:
 Use the format >X>X>X>X for the bank sort code

Salary Settings:
Overtime Rate: 1 x Hourly Rate

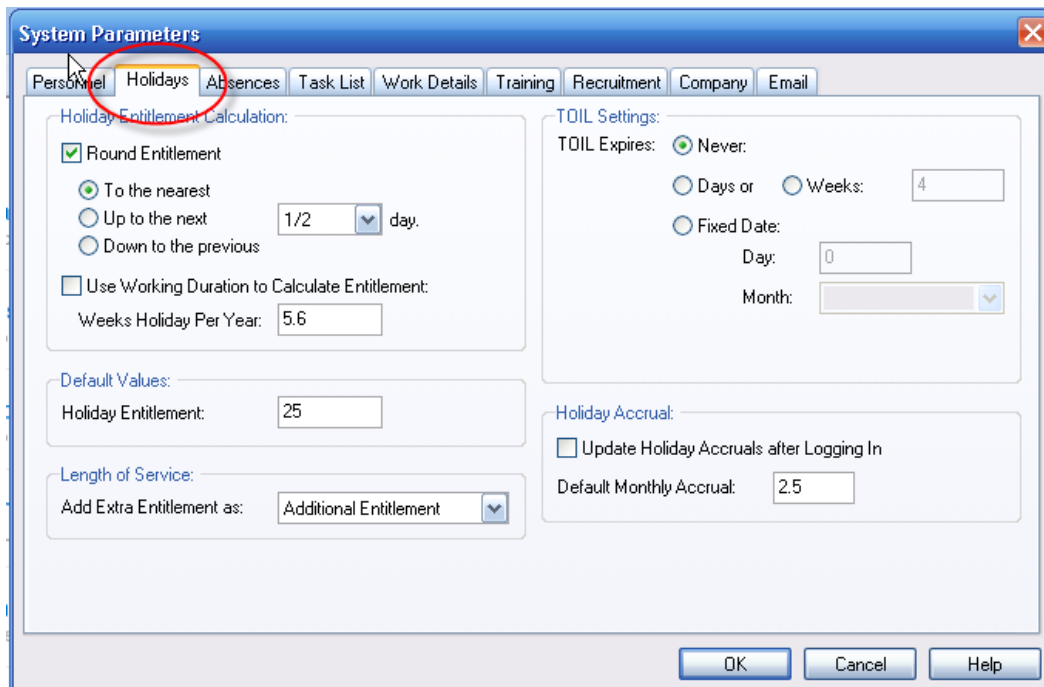
Payroll Details:
 Set Payroll Number to Employee ID for New Employees

Default Planner Options:
 Show Absences Show Courses

New Employee:
 Force Automatic Employee ID
 Department / Location / Hierarchy is Mandatory

OK Cancel Help

Select the 'Holidays' Tab,



System Parameters

Personnel | **Holidays** | Absences | Task List | Work Details | Training | Recruitment | Company | Email

Holiday Entitlement Calculation:
 Round Entitlement
 To the nearest
 Up to the next 1/2 day.
 Down to the previous
 Use Working Duration to Calculate Entitlement:
 Weeks Holiday Per Year: 5.6

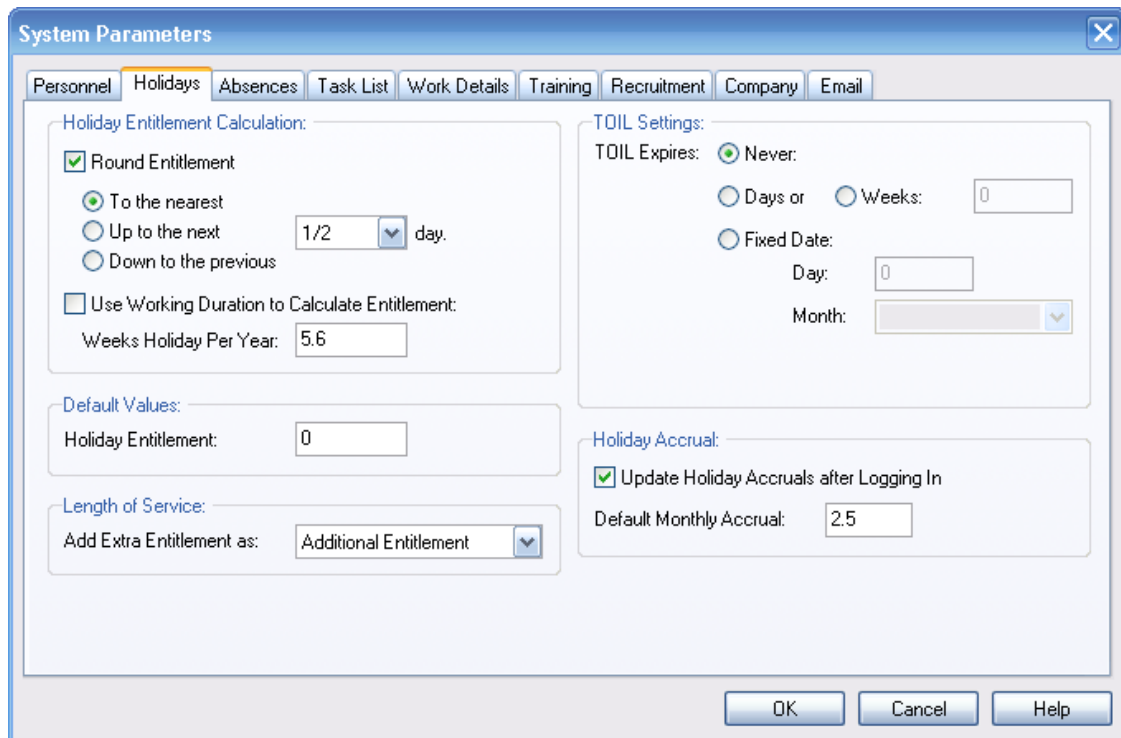
TOIL Settings:
TOIL Expires: Never:
 Days or Weeks: 4
 Fixed Date:
 Day: 0
 Month: [dropdown]

Default Values:
Holiday Entitlement: 25

Length of Service:
Add Extra Entitlement as: Additional Entitlement

Holiday Accrual:
 Update Holiday Accruals after Logging In
 Default Monthly Accrual: 2.5

OK Cancel Help



Holiday Entitlement Calculation is where you have the option to round the default holiday entitlement by ticking the tick box, you should then choose how you round the holiday entitlement by selection one of the radio buttons and the period of time by using the dropdown box.

The default Value for Holiday entitlement can be selected next. The default holiday entitlement will be used when adding a new employee, you should enter the majority holiday entitlement in this box but make sure you take into account the bank holiday entitlement and length of service dropdown option (see Bank holiday profiles and Length of service in the dropdowns section). If these default entitlements are changed then it will not change the employees that have already been allocated any entitlement.

The holiday entitlements functionality has been expanded upon to offer a different method to calculating the normal annual entitlement. The calculation is based on the number of days the employee works in a week multiplied by the number of weeks holiday per year. The calculation is intended to be used for those employees that have a holiday entitlement recorded in days, not hours.

The new calculation and number of days weeks holiday per year are configured using the System Parameters.

Tick the **Use Working Duration to Calculate Entitlement** option to enable the new calculation. Please note this will replace the default option of assigning the default annual entitlement to the employee and, for part time employees,

The new calculation will also use take into account the full time equivalent functionality so it is recommended that if you wish to use this calculation you should disable the FTE functionality using Personnel options in System Parameters. If you don't then part time employees could have a calculated value based on their working week and then have this multiplied by the FTE value, resulting in less days than they should.

The default value for the **Weeks Holiday Per Year** is 5.6, which comes from a standard working week of 5 days, e.g. $5 \times 5.6 = 28$ days per year, including bank holidays.

Select whether the Length of Service will show added to the annual entitlement or show as an additional entitlement.

If you use TOIL (Time off in lieu) select the time period that it will expire in. For example if someone gains 1 days TOIL but must use this within 4 Weeks, Select Week then add a '4' as below.

TOIL Settings:

TOIL Expires: Never:

Days or Weeks:

Fixed Date:

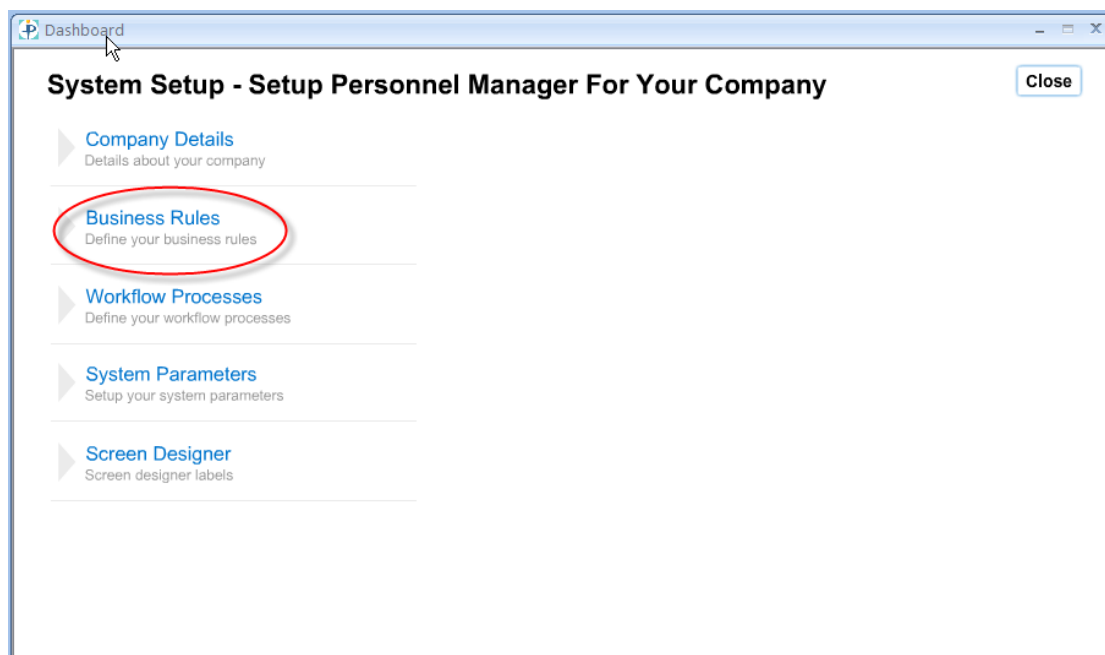
Day:

Month:

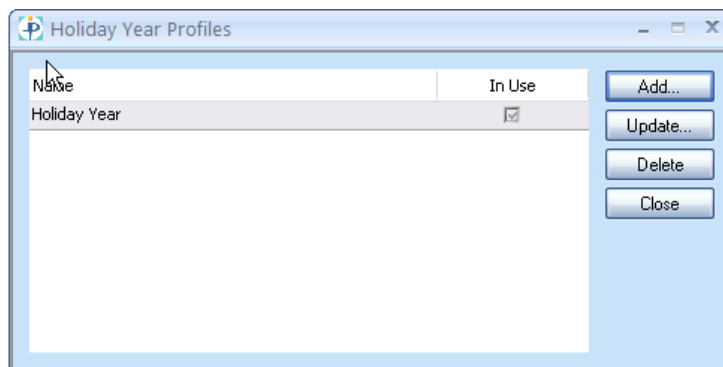
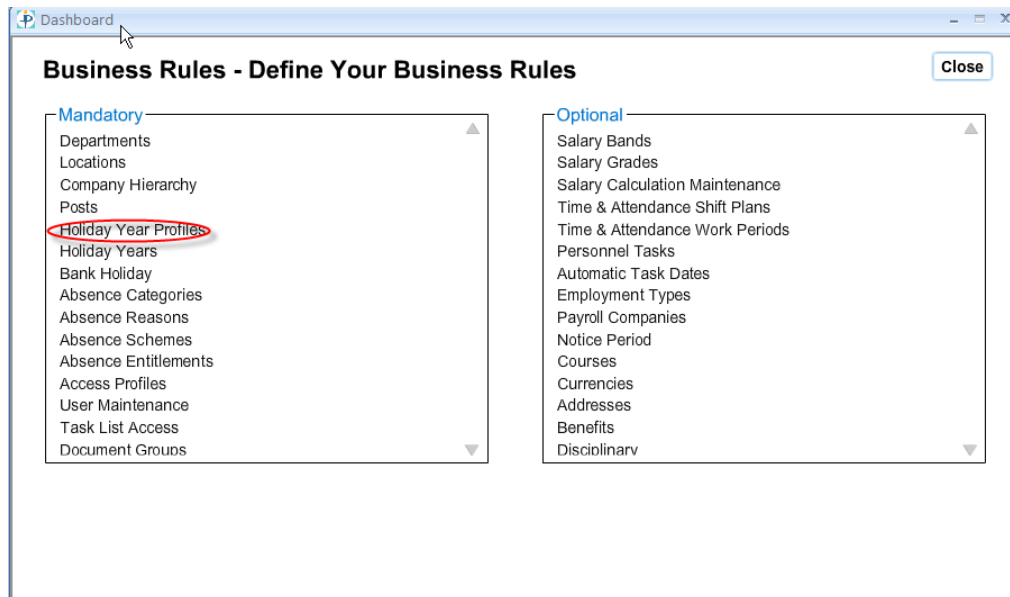
Use the Holidays screen in the System Parameters to set the default accrual figure and also switch on the login functionality. What this will do is when a user logs in, Simply Personnel will check to see which employees need their entitlements updating and add the accrual figure to the existing entitlement on the current holiday year.

Users can still change the employee's entitlement and the next time the accrual is due it will be this entitlement that is updated. The program will not calculate what it thinks the total entitlement should be, just add to the figure already there.

Setting the business Rules;



First select Holiday Year Profiles,



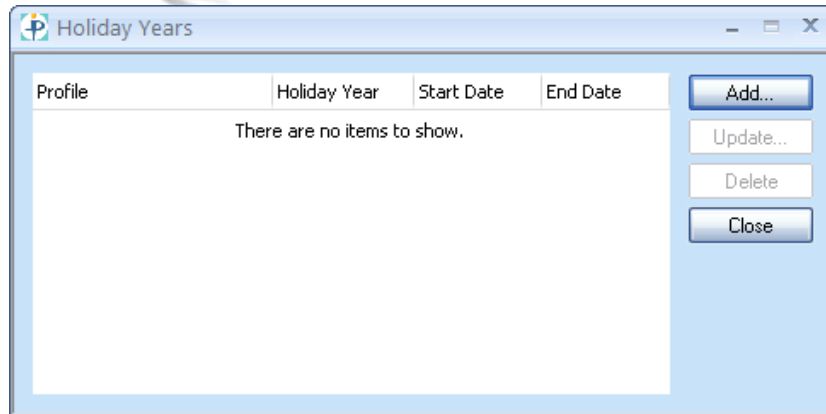
If all of your employees run from the same holiday year the option that is already in the maintenance box is all you will need, however if some employee run from a different holiday year you will need to click on the add button and select a name for that Holiday year (ie Holiday year Managers or Holiday year employed before 1999 etc etc)

Holiday Years:

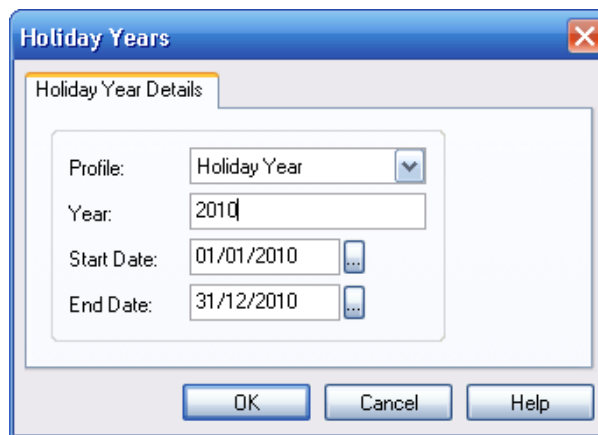
In order to book a holiday you must tell the system that there is a holiday year available to use and what those dates are.

Within this section you are able to allocate start and end dates to the Holidays Year Profiles you have created in the previous step,

To add the dates click select Holiday Years then add on the following screen,



Once you have clicked add you will see this screen,



Choose the correct Profile from the dropdown menu, type the name of your year i.e. 2010, then click the button on the right hand side of the start date box, this will bring up a calendar for you to select the start date of your holiday year. Then repeat the process for the end date.

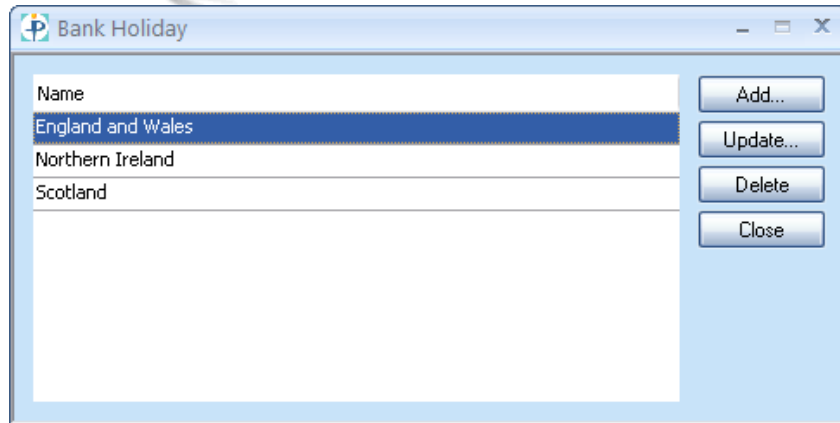
You will now have the option of using these holiday years on an employee's holiday record.

****Note:** If you have different Holiday Year Profiles you will need to add the Holiday Years for each one of the profiles.**

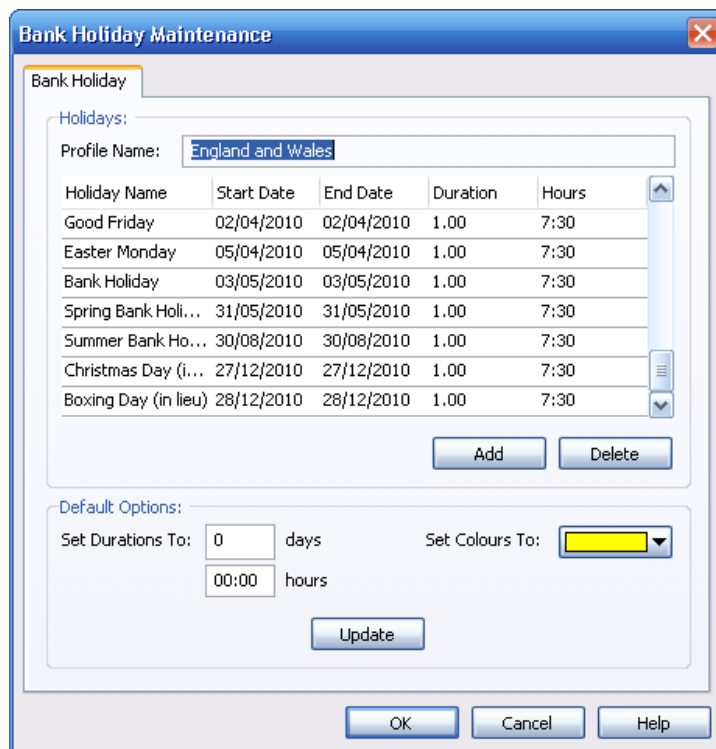
Bank Holidays

Within this section you are able to create bank holiday profiles which will then allocate bank holidays to an employee's holiday profile. There are already some default profiles set up within Simply Personnel which you are able to use.

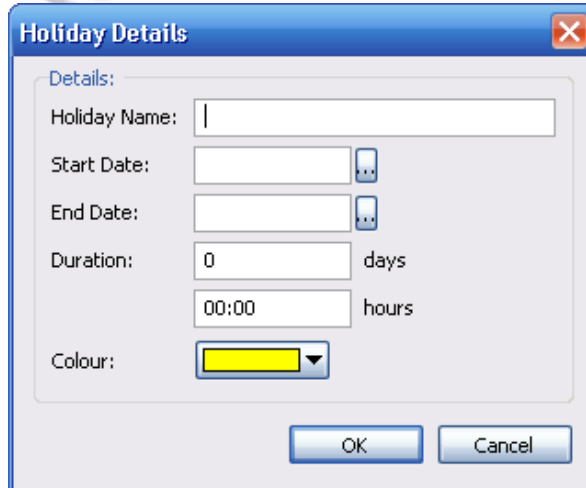
Once you enter the Bank Holidays section you will see the following screen,



You can create as many profiles as you require. To create a new Bank Holiday profile click the Add button however if you wish to change or add dates to a previously created profile click Update on the correct one. Once you have done this you will see the screen below.



You will see a list of bank holidays on this screen however you will need to keep this updated. To add extra days click the Add button and you will be able to add days using the following screen,



Simply add the name of the bank holiday and its start and end dates, this will then automatically create a duration which will come off the employees holiday entitlement when this date is hit. You can also select a colour for this holiday.

On the main bank holiday maintenance Screen next to the dates there is a 'duration' field, you can set each of the durations to a specific number which will then come off the employee's holiday entitlement automatically.

To change all the durations in one go simply use the set duration's box with the correct number and click the Update button, this will then change all the durations and give you the option to update all the employees records who use that profile.

If you do not wish for the bank holiday to take a day off the employee's entitlement, ensure you select '0' in Set duration to, then click update.

Holidays on an Employee Record:

To record a holiday request on an employee's record you need to select the holiday tab on employee's record,

Employee Maintenance - 3 - Agard,Christine

Training Needs/Profiles CPD Processes Blank Page Blank Page Accidents List 2 List 3
Benefits / Vehicles Appraisal Disciplinary / Grievance Training / Qualifications
Notes Docs / Contracts Right to Work Shifts Banking Details Leaver
Personal Work Job / Salary Emergency Contacts Absence **Holidays**

Holiday Years:

Profile Name	Year	Entitlement	Brought Forward	Hours	Additional	Bank Holid
Holiday Year	2010	25.00	0.00	3.00	England ar	

Normal Entitlement: 30 [Accrual...] [Add...] [Update...] [Delete]

Holidays:

Tasks	Year Number	Start Date	End Date	Taken	Hours	Status
	2010	28/12/2010	28/12/2010	1.00	7:30	
	2010	27/12/2010	27/12/2010	1.00	7:30	
	2010	30/08/2010	30/08/2010	1.00	7:30	
	2010	31/05/2010	31/05/2010	1.00	7:30	
	2010	03/05/2010	03/05/2010	1.00	7:30	
	2010	05/04/2010	05/04/2010	1.00	7:30	

Total Annual Entitlement (This Year): 28.00 [Add...] [Update...] [Delete]

Taken / Allocated / Remaining: 6.00 2.00 20.00

URGENT TASKS

Christine Agard

Job Details
Reports to: Manjit Sindhar
Post: Sales Director

Attendance Summary

Oct Nov Dec
Absent: 4.00
Holiday: 2.00 of 28.00

Quick Links
Book Holiday
Record Absence
Attendance Record
Holiday Card
Save Changes
Cancel Changes

First you need to make sure that the correct holiday year is selected, this will be highlighted in the top half of the page.

Employee Maintenance - 12 - Laking,Mark

Training Needs/Profiles CPD Processes Blank Page Blank Page Accidents List 2 List 3
Benefits / Vehicles Appraisal Disciplinary / Grievance Training / Qualifications
Notes Docs / Contracts Right to Work Shifts Banking Details Leaver
Personal Work Job / Salary Emergency Contacts Absence **Holidays**

Holiday Years:

Profile Name	Year	Entitlement	Brought Forward	Hours	Additional	Bank Holid
Holiday Year	2010	25.00	0.00	0.00	England ar	

Normal Entitlement: 30 [Accrual...] [Add...] [Update...] [Delete]

Holidays:

Tasks	Year Number	Start Date	End Date	Taken	Hours	Status
	2010	28/12/2010	28/12/2010	1.00	7:30	
	2010	27/12/2010	27/12/2010	1.00	7:30	
	2010	30/08/2010	30/08/2010	1.00	7:30	
	2010	31/05/2010	31/05/2010	1.00	7:30	
	2010	03/05/2010	03/05/2010	1.00	7:30	
	2010	05/04/2010	05/04/2010	1.00	7:30	

Total Annual Entitlement (This Year): 25.00 [Add...] [Update...] [Delete]

Taken / Allocated / Remaining: 6.00 2.00 17.00

FUTURE TASKS

Mark Laking

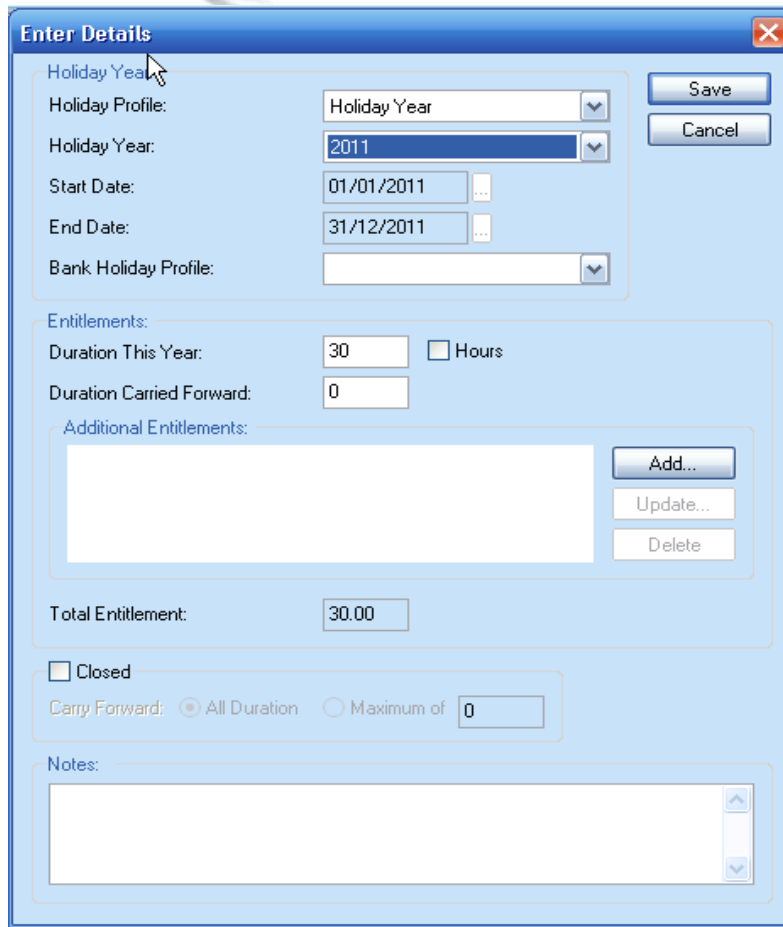
Job Details
Reports to: Christine Agard
Post: Sales Manager

Attendance Summary

Oct Nov Dec
Absent: 0.00
Holiday: 2.00 of 25.00

Quick Links
Book Holiday
Record Absence
Attendance Record
Holiday Card
Save Changes
Cancel Changes

This will tell what the employee entitlement currently is and will also show a history of their holiday years. If you need to add the correct holiday year for an employee click on the 'Add' button and this screen will appear.



Enter Details

Holiday Year: Save Cancel

Holiday Profile:

Start Date: ...

End Date: ...

Bank Holiday Profile:

Entitlements:

Duration This Year: Hours

Duration Carried Forward:

Additional Entitlements:

Add... Update... Delete

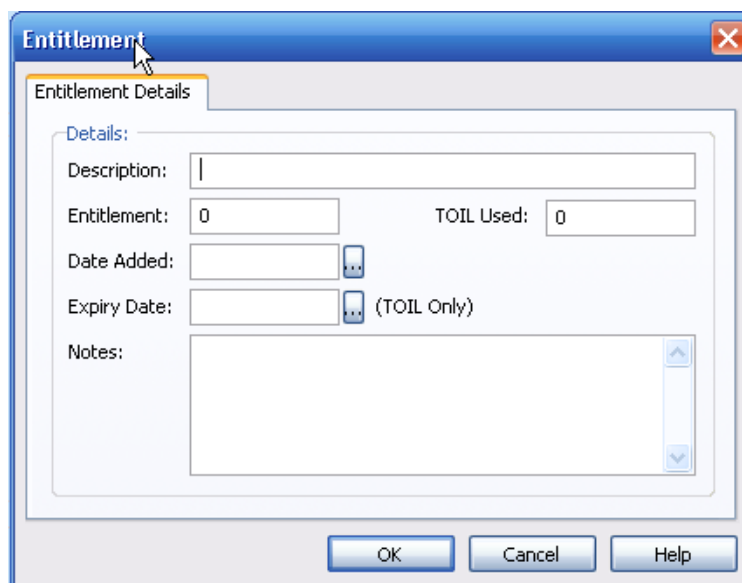
Total Entitlement:

Closed

Carry Forward: All Duration Maximum of

Notes:

Here you need to select the required holiday year and the required bank holiday profile, you can change the employee duration for that year by over typing in the 'Duration this year' Box. If your employee has accrued any additional entitlement click on the 'Add' Button and complete the information in the box, see below,



Entitlement

Entitlement Details

Details:

Description:

Entitlement: TOIL Used:

Date Added: ...

Expiry Date: ... (TOIL Only)

Notes:

OK Cancel Help

Holiday entitlements can now be accrued every month. The accrual settings can be changed using the Accrual button on the employee Holidays screen,

Holiday Accrual ✕

Details:

The Next Update date will be calculated based on the Day to Update value. If this value is greater than the number of days in the month then the next update will be calculated as the last day of the month.

Please note that if you manually set the Next Update to a day that does not match the Day to Update then the following update will take place the next month, not later the same month.

For example, if the Day to Update is the 31st and you set the Next Update to occur on the 10th of July then the following update will be the 31st August, not the 31st July or 10th August.

Use Accrual

Monthly Accrual: Day to Update:

Next Update: Last Updated:

Tick the box to indicate that this employee's entitlement accrues every month. Set the accrual amount, the day of the month to update the entitlement and the date of the next update. The date the entitlement was last accrued is for reference only.

Once you have the correct holiday year set up and selected you can then book the requested holiday for the employee, at the bottom half of the screen there is a record of all the holiday that have been taken and are waiting to be taken (this will include the bank holidays).

Employee Maintenance - 12 - Laking, Mark

Training Needs/Profiles CPD Processes Blank Page Blank Page Accidents List 2 List 3
 Benefits / Vehicles Appraisal Disciplinary / Grievance Training / Qualifications
 Notes Docs / Contracts Right to Work Shifts Banking Details Leaver
 Personal Work Job / Salary Emergency Contacts Absence **Holidays**

Holiday Years:

Profile Name	Year	Entitlement	Brought Forward	Hours	Additional	Bank Holid:
Holiday Year	2010	25.00	0.00	<input type="checkbox"/>	0.00	England an

Normal Entitlement: 30

Holidays:

Tasks	Year Number	Start Date	End Date	Taken	Hours	Status
	2010	28/12/2010	28/12/2010	1.00	7:30	
	2010	27/12/2010	27/12/2010	1.00	7:30	
	2010	30/08/2010	30/08/2010	1.00	7:30	
	2010	31/05/2010	31/05/2010	1.00	7:30	
	2010	03/05/2010	03/05/2010	1.00	7:30	
	2010	05/04/2010	05/04/2010	1.00	7:30	

Total Annual Entitlement (This Year): 25.00

Taken / Allocated / Remaining: 6.00 / 2.00 / 17.00

FUTURE TASKS

Mark Laking

More

Job Details
 Reports to: Christine Agard
 Post: Sales Manager

Attendance Summary

5
4
3
2
1
0

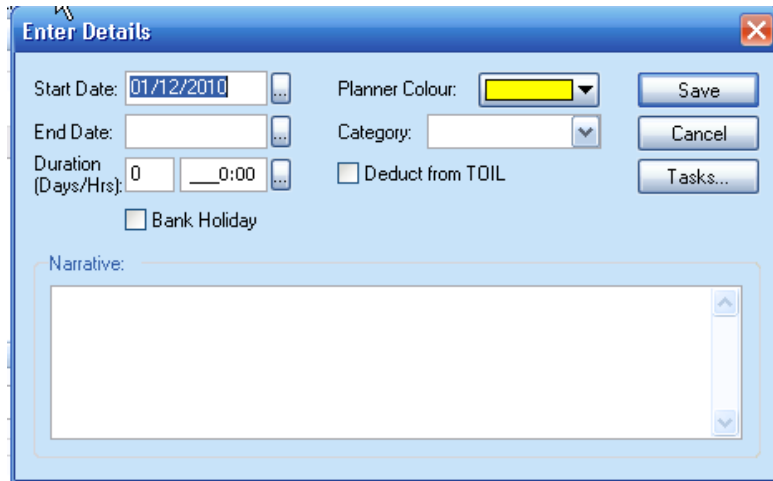
Oct Nov Dec

Absent: 0.00
 Holiday: 2.00 of 25.00

Quick Links

- Book Holiday
- Record Absence
- Attendance Record
- Holiday Card
- Save Changes
- Cancel Changes

Select add at the bottom of the screen and the following box will appear,



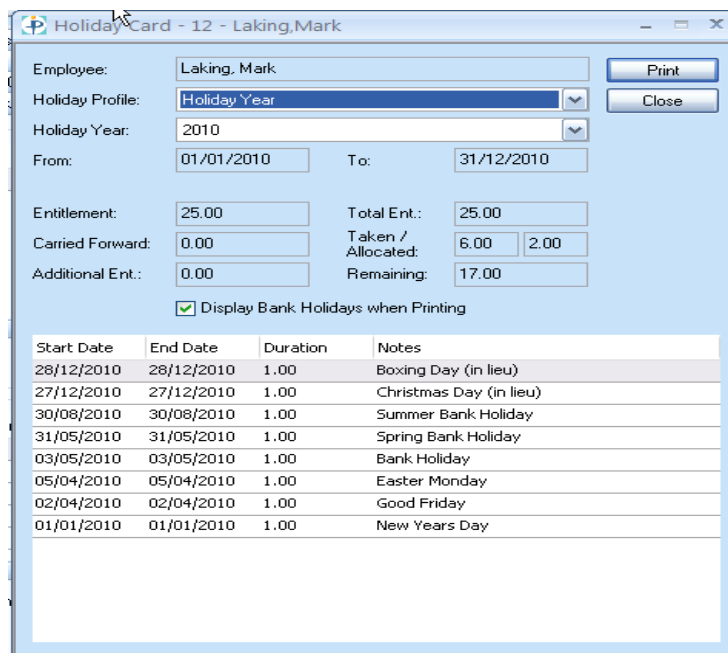
Here you need to enter the start and end date of the requested holiday and then click 'save', this will then show on the previous screen, you can also select a colour (yellow is default) and a Category if you have Self Service.

To amend any holiday, just Simply double click on the relevant holiday and change the dates.

To delete a holiday, Just Simply select the holiday and click 'Delete at the bottom of the screen.

Holiday Card;

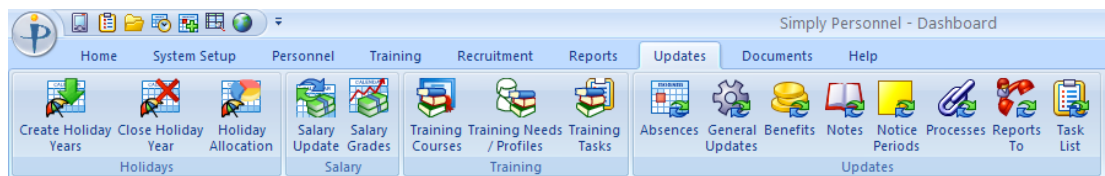
There is the option on the right hand side of the employee maintenance called **Holiday Card** click this option and the following screen will appear.



Start Date	End Date	Duration	Notes
28/12/2010	28/12/2010	1.00	Boxing Day (in lieu)
27/12/2010	27/12/2010	1.00	Christmas Day (in lieu)
30/08/2010	30/08/2010	1.00	Summer Bank Holiday
31/05/2010	31/05/2010	1.00	Spring Bank Holiday
03/05/2010	03/05/2010	1.00	Bank Holiday
05/04/2010	05/04/2010	1.00	Easter Monday
02/04/2010	02/04/2010	1.00	Good Friday
01/01/2010	01/01/2010	1.00	New Years Day

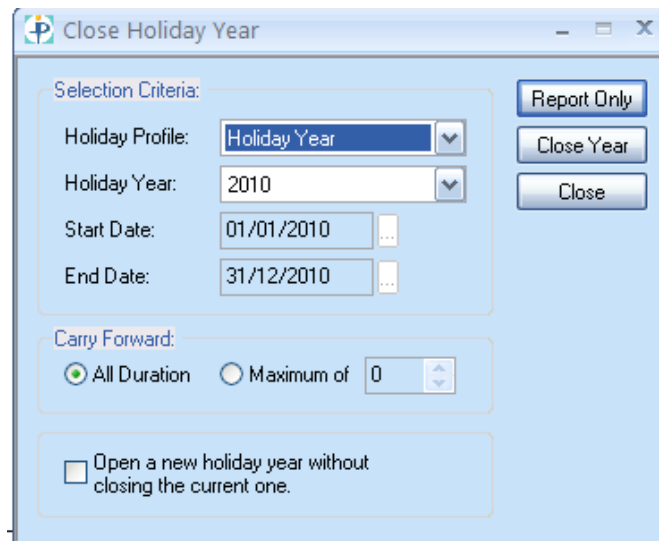
You are able to select the year and this will show you all of the holiday that have been taken during it (including bank holidays), there is also the option to print this out so your employee can have a copy. If you don't want bank holidays to be included, Simply un-check the display bank holidays box.

Global Holidays:



These options mean you can amend employee records in bulk, firstly you can close the current holiday for all you employee at the same time and this will automatically add the next holiday year to the employee records.

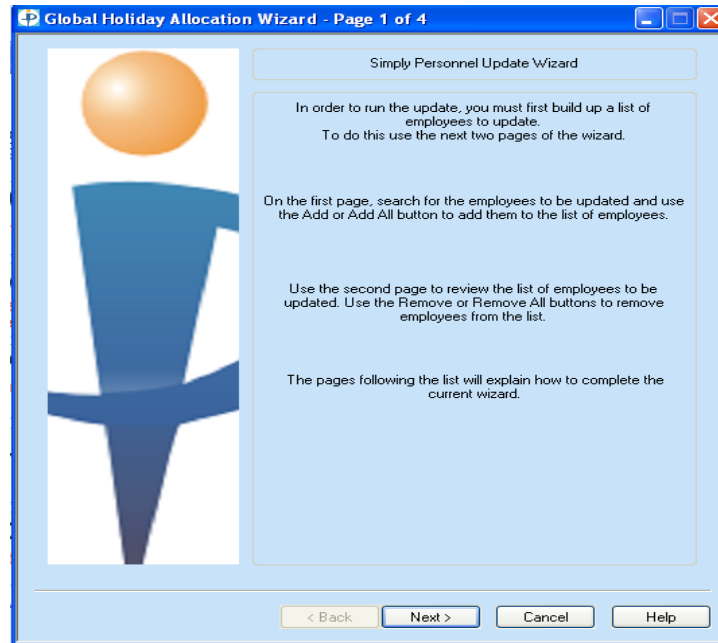
To do this select close holiday year and the following screen will appear,



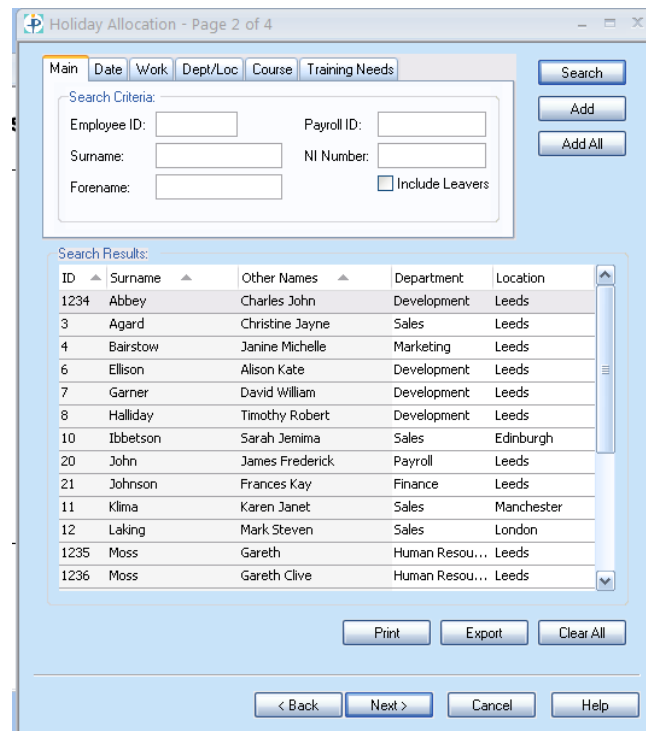
Select the year that you want to close, you can also select the number of unused holidays that an employee can carry over, when you have the correct options select close year, this will then close the year off for all employees and open the next year.

****Please note if you do not allow carry over please ensure this is set to a maximum of '0'**

To allocate a holiday to several or all your employee select allocate holidays, this could be useful if you have a shut down period over the Christmas.



The global holiday allocation wizard will appear, click next and it will take you to a list of you employees, select them all by clicking 'add all' or you can select by department etc. Once you have the required selection click 'add' then click 'next'.



A list will then appear of all of the employees that you have selected, you can remove employee from this list by highlighting the name and click remove.

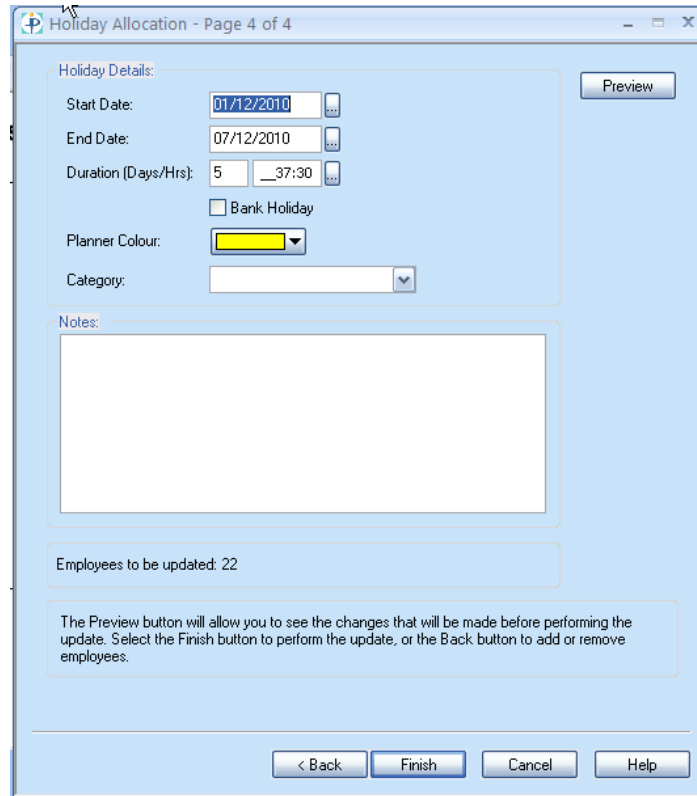
Holiday Allocation - Page 3 of 4

ID	Surname /	Other Names	Department	Location
1234	Abbey	Charles John	Development	Leeds
3	Agard	Christine Jayne	Sales	Leeds
4	Bairstow	Janine Michelle	Marketing	Leeds
6	Ellison	Alison Kate	Development	Leeds
7	Garner	David William	Development	Leeds
8	Halliday	Timothy Robert	Development	Leeds
10	Ibbetson	Sarah Jemima	Sales	Edinburgh
20	John	James Frederick	Payroll	Leeds
21	Johnson	Frances Kay	Finance	Leeds
11	Klima	Karen Janet	Sales	Manchester
12	Laking	Mark Steven	Sales	London
1235	Moss	Gareth	Human Resour...	Leeds
1236	Moss	Gareth Clive	Human Resour...	Leeds
14	Palmer	Nick James	Sales	Edinburgh
15	Roberts	Andrea Stacey	Sales	Manchester
1	Sindhar	Manjit Kaur	Administration	Leeds
16	Smith	Jane Gemma	Sales	London
17	Spalding	Andrew Christo...	Sales	Leeds
18	Taylor	Gabriella Martina	Sales	Leeds
23	Test	Test		
19	Watson	Patricia Helen	Human Resour...	Leeds
22	Yerson	Jennifer Diana	Administration	Leeds

Remove Remove All Print Export

< Back Next > Cancel Help

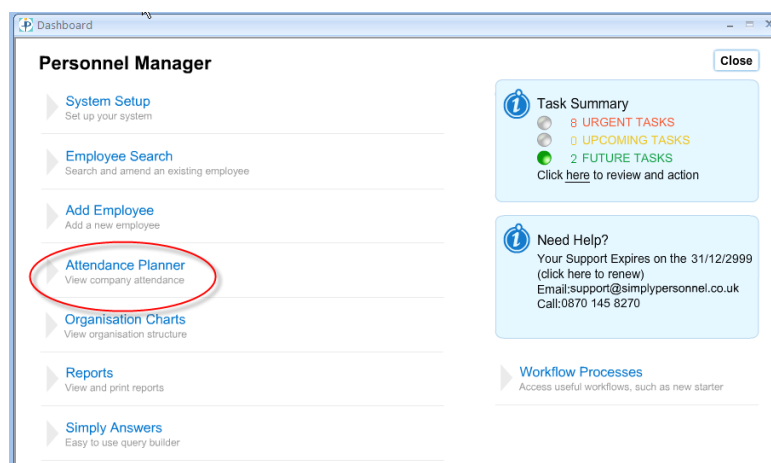
When happy with your selection click 'next' and it will take you to the following screen.



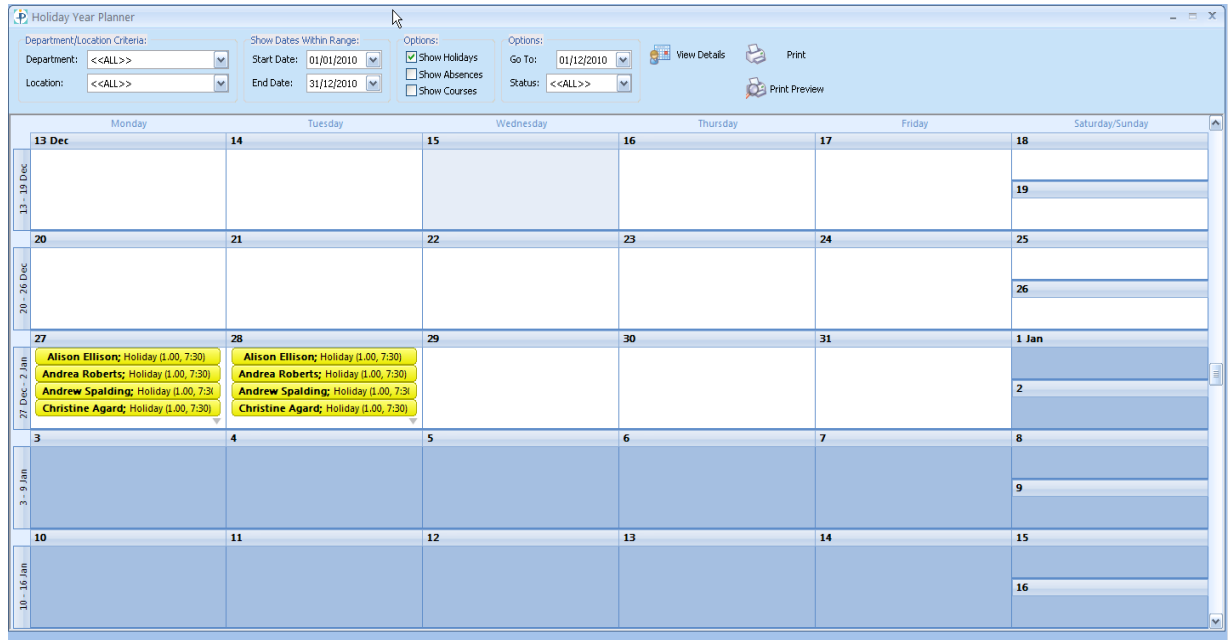
Select the start and end date then click 'finish'. This holiday will then appear on the records of your selected employees.

Attendance Planner:

You can select the holiday planner from the main dashboard by clicking on this button.



This will open up the following window, it shows a calendar with all of the holidays that have been booked on to the system these will be show by the employee's name and highlighted in yellow.



At the top of this window you can select different departments and location to show only those employees in that area, you can amend the date range by changing the start and end date and you can also show all absences and training courses by tick the boxes in the option box.

By clicking on the date in the calendar it will open up a window of all the employees that have got an event booked that day then by selecting an employee it will take you to their employee maintenance record.

There are options to print preview and print the calendar at the top of the screen.

You can also select 'View Details' and select the date range and this will list all Holidays during the date range you have selected.