

# Employee Holiday Module Users Guide

### Contents

1.	Des	cription	2
2.	Hoy	w to set up	2
	2.1.	Company dependant constants should be set for module operation.	2
	2.2.	Define Bradford Scale Absent Codes	4
	2.3.	Define Employee Extra Holiday Reasons (Recommended)	5
	2.4.	Define Absent Codes as Holiday and optionally Extra Holiday	5
	2.5.	Employee Working Days/Hours	6
	2.6.	Holiday Groups	7
	2.6.1.	Holiday Group Warning Level	7
	2.6.2.	Holiday Group Leader	8
	2.6.2.1	. Holiday Group leader email include Holiday Requests	8
	2.7.	Employee Holiday Groups	10
	2.8.	Employee Holiday Authoriser User	10
	2.9.	Employee Ignore Closed Days	11
	2.10.	Holiday Requests BPM Rules	11
	2.11.	Employee Initial Holiday Entitlement	12
3.	Hoy	w to Record Holiday	14
4.	Hoy	w to Record Extra Holiday	15
	4.1.	Using Extra Holiday Reasons (Recommended)	15
	4.1.1.	One-Off Extra Entitlement	16
	4.2.	Using Extra Holiday Absence (Optional)	17
	4.3.	Employee Holiday History reflects above entries:	17
5.	Hol	iday Requests	18
	5.1.	Adding a Holiday Request	18
	5.2.	Authorizing a Holiday Request	19
	5.3.	Holiday Request Comments	20
	5.4.	Holiday Group Warnings	20
	5.5.	Holiday Group Leader Email	20
6.	Cal	endar of Employee Absences Report	21
7.	Em	ployees on Holiday Report	21
8.	Em	ployee Holiday Requests Report	22
9.	Hol	iday Forward Entitlement	22
1(	). I	Holiday History Recalculation	23
11	l. (	Compulsory Holidays	24
12	2. I	Bradford Scale	25
	12.1.	Showing Scale for individual Employee	25
	12.2.	Reporting Scale for Employees	26



### 1. Description

The employee holiday module enables maintenance of employee holiday entitlement, enhances the existing Employee Absences functionality to specially record holidays and to see remaining days for any given employee and calendar year. It also enables the recording of employee holiday requests and their authorisation by selected other employees auto populating Employee Absences as appropriate. Holiday requests are supported by BPM statuses thus allowing rules to be added to email requests upon change of status.

### 2. How to set up

#### 2.1. Company dependent constants should be set for module operation.

Company Constants must be set up in the form: System Management > System Maintenance > Constant Forms > Medatech Company Constants

The default number of days holiday entitlement for new employees. NB. Used whenever the module needs to create holiday entitlement details for an employee and no previous details exist or are applicable.

## Medatech Company Constants

î	Constant	Value	Description	Original Value		
l	CarryHolFwd	0	Maximum Holiday Carry Forward	0		
l	DefHolDays	0	Default Holiday Entitlement	0		
I	HolLenWarn	0	Holiday Request Length Warning Limit	0		
l	MinHolQty	0.5	Minimum Holiday Qty	0.5		
l						
l						
l						
l						
T						
Ī						
	Help Text Trans	lation of Help T	Text			
Î			Help Text			
I	If Holiday system inst					
I	Sets the numbers of day at which to add a warning to any request					
I	emails sent to authori	isors/group leaders.				

# MEDATECH

#### FUTURE PROOF YOUR BUSINESS

Minimum amount of holiday entitlement the module will manipulate. E.G. If set to the default 0.5 day booking holiday for 1 hour will round up to 0.5 days.

## Medatech Company Constants

Î	Constant	Value	Description	Original Value		
	CarryHolFwd	0	Maximum Holiday Carry Forward	0		
	DefHolDays	0	Default Holiday Entitlement	0		
	HolLenWarn	0	Holiday Request Length Warning Limit	0		
	MinHolQty	0.5	Minimum Holiday Qty	0.5		
ł						
I						
I						
I						
I						
ļ						
	Help Text Trans					
Î						
I	If Holiday system inst					
I	Sets the minimum holiday quantity in part of day,					
I	E.G. 1.0 = Whole days only, 0.5 = 1/2 day, 0.25 = 1/4 day or					
I	0.125 = 1/8th day.					
ļ						

Maximum amount of holiday entitlement that can be carried forward to the next calendar year if the holiday forwarding procedure or holiday requests are used.

## Medatech Company Constants

Const	ant	Value	Description	Original Value		
CarryHolFw	CarryHolFwd 0		Maximum Holiday Carry Forward	0		
DefHolDays	DefHolDays 0		Default Holiday Entitlement	0		
HolLenWar	n	0	Holiday Request Length Warning Limit	0		
MinHolQty		0.5	Minimum Holiday Qty	0.5		
<u> </u>						
Help Text	Trans	slation of Help 1	Fext			
Î			Help Text			
If Holiday s						
Sets the ma						
the next ye						

# MEDATECH

#### FUTURE PROOF YOUR BUSINESS

If Group Leader emails (see later on) are set to be sent, then add a warning to the email if the holiday exceeds this number of days.

## **Medatech Company Constants**

Constant	Value	Description	Original Value
CarryHolFwd	0	Maximum Holiday Carry Forward	0
DefHolDays	0	Default Holiday Entitlement	0
HolLenWarn	0	Holiday Request Length Warning Limit	0
MinHolQty	0.5	Minimum Holiday Qty	0.5

_							
	Help Text	Translation of Help Text					
Î			Help Text				
l	If Holiday system installed and licenced.						
l	Sets the numbers of day at which to add a warning to any request						
	emails sent to authorisors/group leaders.						

#### 2.2. Define Bradford Scale Absent Codes

Absent Codes to be included in the Bradford scale calculations must be set up in the standard absent codes form: Human Resources > HR Definitions > General Definitions > Reasons for Absence

## **Reasons for Absence**

*Absen	Reason for Absence	HolidaExtra Exclu(Bradfo
01	Illness	
02	Vacation	
_	Priority He	lp
	Bradford S	Scale?:
	i Tick this b the Emplo Employee	box to include any absences with this reason in byees Bradford Scale calculation or on the "Calc. es Bradford Scale" report.
·		ОК



#### 2.3. Define Employee Extra Holiday Reasons (Recommended)

Extra Holiday Reason Codes must be set up in the new form: Human Resources > Employee Holidays > Extra Holiday Reasons

## **Extra Holiday Reasons**

*Extra	*Reason Description
WRK	Worked During Holiday

#### 2.4. Define Absent Codes as Holiday and optionally Extra Holiday

Absent Codes must be set up in the standard absent codes form: Human Resources > HR Definitions > General Definitions > Reasons for Absence

If the absence code should deduct from holiday entitlement taken then flag the holiday 'Tick Box' against the absence code If the absence code should add to the holiday (i.e. give extra holiday entitlement awarded) then flag the Extra holiday 'Tick Box' against the absence code. This absence code can be marked so entries will not be posted into the calendar. **NB:** Extra holiday entitlement is carried forward to subsequent years being added to current entitlement for the next year **NB2:** This Extra holiday is an alternate method to using Extra Holiday Reasons, we recommend using the latter.

## **Reasons for Absence**

Î	*Absen	Reason for Absence	Holida	Extra	Exclu	Bradfe
l	01	Illness	~			
l	02	Vacation		~	~	
l						
l						
l						



#### 2.5. Employee Working Days/Hours

Globally this can be set up in the standard Office Hours form: Office Management > Appointments & Office Hours > Office Hours

NB. There is an extra column to record the length of a single break in the day. E.G. 08:30 to 17:30 with 1:00 break means 8 hours per day.

## Office Hours

Î	*Day	Start	*End	Break Tim
l	Mon	09:00	17:00	01:00
l	Tue	09:00	17:00	01:00
l	Wed	09:00	17:00	01:00
l	Thu	09:00	17:00	01:00
	Fri	09:00	17:00	01:00

This can be varied for an individual employee using the standard employee Office Hours form:

Office Management > Appointments & Office Hours > Office Hours per Employee

NB. There is an extra column to record the length of a single break in the day. E.G. 09:00 to 17:30 with 1:00 break means 7.5 hours per day.

## Office Hours per Employee

Î	• User Name	*Day	Start	*End	Branch Cod	Branch Name	Frequer	Break Tim
l	MrCat	<mark>∼</mark> n	08:00	20:00			1	01:00
l								
l								
l								
ļ								
l								



#### 2.6. Holiday Groups

Holiday groups are optional. They are used to give warnings in the Holiday Request form when employees within the same holiday group or groups as each employee can be linked to up to three different groups request holiday with overlapping dates. A limit on the number of employees on holiday at same time before any warning is given may be set. Also a Holiday group leader may be defined, this user is sent an email when someone within the holiday has a holiday request approved by the defined authoriser (see further on in document) and optionally when that employee request holiday.

These can be set up using the new holiday group form on the new menu: Human Resources > Employee Holidays > User Holiday Groups

## **User Holiday Groups**

*Holiday Group Code	e Holiday Group Desc.	Warning Le	Group Leader	Incluc
Office A	Southampton	0		
Office B	Plymouth	0		
Office C	Exeter	0		

2.6.1.Holiday Group Warning Level

## **User Holiday Groups**

Î	*Holiday Group Code	Holida	ay Group	Desc.	Warning Le	e Group Leader	Incluc
l	Office A	Southampton				]	
l	Office B	Plymouth			0		
l	Office C	Exeter			0		
	1		Prio	Warning Level: Warning Level, when request holiday for the zero means a warnin employees holidat d	n more than t he same date ng is always g ates clash.	this number of employees then a warning is given, given when any	
	Holiday Group Employ	ees				ок	
Î	• User Name	Holiday Gro	_				



2.6.2. Holiday Group Leader

## **User Holiday Groups**

Î	*Holiday Group Code	Holida	ay Group	Desc.	Warning Le	Group Leader
L	Office A	Southampton			0	
	Office B	Plymouth			0	
L	Office C	Exeter			0	
Ľ		ſ				
Į.			Prio	rity Help		I
h				Group Leader:		
			i	Optional User Login any member of this I approved and option	, this user will holiday group nally using the	receive an email when has a holiday request next tick-box when such
Ļ				a user requests holio	day.	L
ł	loliday Group Employe	ees				0%
	• User Name	Holiday Gro	_			OK

#### 2.6.2.1. Holiday Group leader email include Holiday Requests

## **User Holiday Groups**

î	*Holiday Group Code	Н	oliday Group Desc.		Warning Le	• Group Leader	Incluc
L	Office A	Southampton			0		
L	Office B	Plymouth			0		
L	Office C	Exeter			0		
L							
ł							
L		[	Drierity Lleir				
L			Phonty Help	)			
L			Include Rec	uests?:			
L			Tick this bo	x to also send	I the Group Le	eader an email when	
Ļ			any membe	r of the group	requests holi	iday in addition to	
	Holiday Group Employ	ees	when appro	ved.			
î	• User Name	Holiday				OK	
L						ÖK	



A sub-level of the User Holiday Groups form will show a list of the employees linked to each holiday group

,

## **User Holiday Groups**

Î	*Holiday Group Code	Holiday Group De	sc. Warning Le	Group Leader	Incluc
I	Office A	Southampton	0		
I	Office B	Plymouth	0		
I	Office C	Exeter	0		
I					
ł					
l					
l					
l					
l					
ļ					
	Holiday Group Employ	ees			
Î	• User Name	Holiday Group 1 Code	Holiday Group 2 Code	Ioliday Group 3 Code	

9

2

User N	lame I	Holiday Group 1 Code	Holiday Group 2 Code	Holiday Group 3 Code
Ketchum	0	Office A		



#### 2.7. Employee Holiday Groups

Employees can be linked to up to three holiday groups using the sub-level form: Human Resources > Personnel File > Company-Specific Information

			General	Position & Team	Address & Phone	Definitions	Assigned to
Employee ID	0	12	3 User	Ketchum	Title		
ID Number	8521698		First Name		Title (Lang 2)		
Full Name	Ash Ketchum		Surname		Gender	м	
			Name (Lang 2)		Gender Desc.	Male	
			First Name (Lang2)		Inactive Employee		
			Surname (Lang2)		Attachments?		
			API User Name				
sonal Details Comp	any-Specific Information	Employee's Bank Accou	nt Cross-Department Assign	nment Jobs Applied For Pr	ojects Managed by Employee Projects	Supervised by Employee	1 2
			Details	Add'l Details	Data F	Privileges	Misc.
Employee Name	Ash Ketchum		Authorising Employee				
Type of Sale	٥		Holiday Group 1 Code	Office A			
Task Code			Holiday Group 2 Code				
Task Type			Holiday Group 3 Code				
Main Branch	0		Ignore Office Closed				
	0						
Department							

#### 2.8. Employee Holiday Authorizer User

In the same form Employees can be set as having the authority to view other employees' holiday requests and change their status to Approved or Rejected (see 2.7). For an employee to use holiday requests they must have an authorizer set-up for them. It is valid to set an employee as having authority to authorize his/her own holiday requests.

ersonnel File	e					< 1 🗷 🖄	9 E 🗄 Q t
			General	Position & Team	Address & Phone	Definitions	Assigned to
* Employee ID	0	123	User	® Ketchum	Title		
* ID Number	8521698		First Name		Title (Lang 2)		
Full Name	Ash Ketchum		Surname		Gender	м	
			Name (Lang 2)		Gender Desc.	Male	
			First Name (Lang2)		Inactive Employee		
			Surname (Lang2)		Attachments?		
-			API User Name				
Start							
sonal Details Con	npany-Specific Information	Employee's Bank Account	Cross-Department Assig	iment Jobs Applied For Pro	ojects Managed by Employee   Projects	Supervised by Employee	
			Details	Add'l Details	Data	Privileges	Misc.
Employee Name	Ash Ketchum		Authorising Employee	Manager		<b>Z</b>	
Type of Sale	0		Holiday Group 1 Code	Office A			
Task Code	_		Holiday Group 2 Code	_			
Task Type		Priority Help					
Main Branch	0	Authorizing Employees					
Department	0	Autionsing Employee.					
Warehouse	0	Enter the Employee allowed holiday requests. If employee this employee.	to authorise this employees e can self-authorise then enter				
horization for Bran	ches Authorization for Sa	ales Reps Authorization for B	Budget Items   Authorizat	n for Sales Opp Types Autho	rization for Subsidiaries Authorization	n for Payroll Groups	



#### 2.9. Employee Ignore Closed Days

Tick this box if this employee does not get office closed days [Office Management > Appointments & Office Hours > Holidays (Office Closed)] and would need to book holiday for those days.

Personnel Fil	le								< 🗎 🗵	Þ ♭ ■	± < ☆ ×
Î			General	Positio	n & Team	Addres	& Phone	Definitions	A	ssigned to	Misc.
* Employee ID * ID Number * Full Name Start	0         333333333           Cherry Cherry         Cherry Cherry	3	User First Name Surname Name (Lang 2) First Name (Lang API User Name	0 ng2) (2)	Cherry	Priorit Is 1 T	Title (Lang 2) Gender Gender Desc. Inactive Employe y Help nore Office Closed: ck this box if this Employee addition to their holiday all	e does get officce close owence, if ticked close	F Female		
Employee Name Type of Sale Task Code Task Type Main Branch Department Warehouse	Cherry C	Employee's Bank Account	Details Authorising Em, Holiday Group 2 Holiday Group 2 Holiday Group 3 Ignore Office Cl	ployee 1 Code 2 Code 3 Code losed	Jobs Applied For Add'i Detai		n be taken as holiday.		ОК		Misc.

Employees without this tick cannot book holiday for these days.

#### 2.10. Holiday Requests BPM Rules

Holiday request statuses are set as follows, add any rules you wish to trigger emails etc. *Human Resources > Employee Holidays > Holiday Request Status* 





#### 2.11. Employee Initial Holiday Entitlement

- 2.11.1. Create manually by entering details in new
- Human Resources > Personnel File > Employment Holiday History form:
- 2.11.2.

## Personnel File

							Genera	I	Position	ı & Team
* Employee II	D	0				3	User		0	Cherry
* ID Number		333333	33333			<b></b>	First Na	me		
* Full Name		Cherry	Cherry				Surnam	e		
							Name (l	ang 2)		
	1						First Na	me (Lang2)		
							Surnam	e (Lang2)		
							API Use	r Name		
Start	J									
Employee Holi	iday Histor	y								
*Year	Holiday	B/Fwd	One Off Ext	Entitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested
2,015	34.000	0.00	0.000	34.000	0.000	34.000	0.000	0.00	34.000	0.000

2.11.2.1. Enter the holiday year number i.e. 2011

2.11.2.2. Enter the year's holiday entitlement in days.

Personnel File												< 11 8 þ 5 8 F 9
						General		Positio	n & Team	Address & Phone	Definitio	ons Assigned to Mi
* Employee ID	3333333333	3			3	User First Nar	ne	0	Cherry	Title	ung 2)	
* Full Name	Cherry Che	rry				Surname				Gender	D	F
						First Nar	ang 2) ne (Lang2)			Inactiv	Employee	remaie
						Surname API User	(Lang2) Name			Attachr	ients?	
Start												
*Year Holiday	B/Fwd One	Off ExtE	Entitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested			1 2 3
2,015 34.000	0.00	0.000	34.000	0.000	34.000	0.000	0.00	34.000	0.000			

<sup>2.11.3.</sup> Create Automatically by using the Forward Holiday Entitlements direct activation on the *Human Resources > Personnel File form:* 



2.11.3.1. Enter holiday year i.e. 2011, the procedure will then create records for **all** active employees and create details in Employment Holiday History using the default number of holiday entitlement days from the company constant set earlier.

Parameter Input			×
This routine will clear any values fro year entered then recalculate entitle entitlement constant.	m the sub-level "Extra ements based on the pr	Holiday Entitlemer evious year and/o	nts" for the r the default
Year = 2016			
Clear			
	ОК	Cancel	Help



< 11

FUTURE PROOF YOUR BUSINESS

#### 3. How to Record Holiday

If not using holiday requests or to record extra holiday entitlement.

- 3.1. Go to Human Resources > Personnel File form:
- 3.2. Find the user in the normal way.
- 3.3. Go to the sub-level form 'Calendar of Employee Absences'
- 3.4. Enter the Start Date for the holiday, this will populate the users' standard start and end time for this day of the week.
- 3.5. If the holiday is for more than one day, then specify the end date of the holiday.
- 3.6. Select the absence code.

#### **Personnel File**

							General	Po	osition & T	eam	Address	& Phone	Definitions
*Employee ID	0					3	3 User		<sup>®</sup> Che	rry		Title	
ID Number		3333333333					First Name					Title (Lang 2)	
Full Name		Cherry Cherry					Surname					Gender	
							Name (Lang 2	2)				Gender Desc.	
							First Name (L	ang2)				Inactive Empl	oyee
							Surname (Lar	ng2)				Attachments?	
							API User Nam	1e					
							AT OSCI HUII						
Start												_	
Start aves of Absent	ce Tasks	or Document	Remar	ks At	ttachr	ments	Set Up Skype His	tory of Sta	atuses	To Do Item H	istory of Chai	nges Calendar of	Employee Absen
Start aves of Absent rom Date From	ce Tasks f m HoulFrom [	or Document	Remar To Hour	ks At	ttachr Exclue	Absence	Set Up Skype His Reason for Absence	tory of Sta	Days	To Do Item H	istory of Chai ture	Galendar of Time Stamp	Employee Absen Request No.
Start ves of Absend rom Date From 09/16	ce Tasks f m HoulFrom ( 00 Wed	or Document <ul> <li>*To Date</li> <li>14/09/16</li> </ul>	Remar To Hour 17:00	ks At To Day Wed	ttachr Exclue	ments Absence 02 H	Set Up Skype His Reason for Absence Holiday	tory of Sta Portion o 0.00	atuses Days 1.000	To Do Item H Signa Cherry	istory of Char ture	nges Calendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.
Start ves of Absent rom Date From 709/16 (11)	ce Tasks f m Hou From I 00 Wed	or Document To Date	Remar To Hour 17:00	ks At To Day Wed	ttachr Exclue	ments Absenc 02 H	Set Up Skype His Reason for Absence Holiday	tory of Sta Portion o 0.00	atuses Days 1.000	To Do Item H Signa Cherry	istory of Chai	nges Calendar of Time Stamp 14/09/16 10:51	<b>Employee Absen</b> Request No.
Start ves of Absent rom Date Fron 09/16 iii	ce Tasks f m Hou From ( 00 Wed	for Document *To Date 14/09/16	Remar To Hour 17:00	ks At To Day Wed	Exclue	ments Absenc 02 H	Set Up Skype His Reason for Absence Holiday	tory of Sta Portion o 0.00	atuses Days 1.000	To Do Item H Signa Cherry	istory of Char ture	Calendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.
Start ves of Absen rom Date Fror 09/16	ce Tasks f m Hou From ( 00 Wed	for Document ★To Date 14/09/16	Remar To Hour 17:00	ks At To Day Wed	Exclue	ments Absence 02 F	Set Up Skype His Reason for Absence Holiday	tory of Sta Portion o 0.00	atuses Days 1.000	To Do Item H Signa Cherry	istory of Char ture	Galendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.
Start Inves of Absent rom Date Fror 109/16	ce Tasks ( m HourFrom ( 00 Wed	for Document	Remar To Hour 17:00	ks At To Day Wed	Exclue	ments Absence 02 H	Set Up Skype His Reason for Absence foliday	tory of Sta Portion o 0.00	atuses Days 1.000	To Do Item H Signa Cherry	istory of Chai	Gelendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.
Start Inves of Absent rom Date From 109/16	rce Tasks f m Hou From D 00 Wed	for Document *To Date 14/09/16	Remar To Hour 17:00	ks At To Day Wed	Exclu	ments (Absenc) 02 H	Set Up Skype His Reason for Absence Holiday	tory of Sta Portion o 0.00	Days 1.000	To Do Item H Signa Cherry	istory of Chai	Gelendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.
Start aves of Absen from Date Fro 109/16 (#)	rce Tasks f m HouiFrom I 00 Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks At To Day Wed	Exclue	ments (Absenc) 02 H	Set Up Skype His Reason for Absence toliday	tory of Sta Portion o 0.00	Days 1.000	To Do Item H Signa Cherry	istory of Char Rure	Generation of Calendar of Time Stamp 14/09/16 10:51	Employee Absen Request No.

The quantity of holiday entitlement used is based on the employee's hours for each day and the times entered for each day rounded up to the nearest minimum holiday quantity as set in the company constant earlier.

#### Examples

Employee Hours are 08:30 - 17:30 Monday to Friday with 01:00 hour lunch break

Start Date	Start Time	End Date	End Time	Days Entitlement Used
Two Weeks hol	iday from 3rd Jar	n 11 to 14 <sup>th</sup> Jan 11	L	
03/01/11	08:30	14/01/11	17:30	10.000
Three Days Holi	day			
17/01/11	08:30	19/01/11	17:30	3.000
Monday Mornii	ng Off			
24/01/11	08:30	24/01/11	12:30	0.500

Employee Hours are 09:00 – 17:00 Monday to Friday with 01:00 hour lunch break

Start Date	Start Time	End Date	End Time	Days Entitlement Used
Two Weeks hol	iday from 3rd Jan	11 to 14 <sup>th</sup> Jan 11	L	
03/01/11	09:00	14/01/11	17:00	10.000
Three Days Holi	day			
17/01/11	09:00	19/01/11	17:00	3.000
Monday Mornii	ng Off			



24/01/11	09:00	24/01/11	12:30	0.500
But if Monday N	<b>Norning Off ente</b>	red as over ½ the	e day in terms of	working hours then rounds up!
24/01/11	09:00	24/01/11	13:00	1.000

## 4. How to Record Extra Holiday

#### 4.1. Using Extra Holiday Reasons (Recommended)

#### **Personnel File**

ĺ							Genera	ıl	Position	& Team	Address & Pho
* Employee ID * ID Number		© 333333	33333			3	User First Na	me	٥	Cherry	
<b>⊁</b> Full Name		Cherry	Cherry				Surnam	e			
•							Name (l	ang 2)			
							First Na	me (Lang2)			
							Surnam	e (Lang2)			
							API Use	r Name			
Start											
Employee Holida	y Histor	Y									
*Year Ho	oliday	B/Fwd	One Off ExtE	Intitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested	
2,016	2.000	77.00	0.000	79.000	1.000	80.000	0.000	0.00	80.000	0.000	
		_									 
Extra Holiday En	titlemer	nts				2					
*Extra	Reaso	on Descript	tion	*Extra	Day:One-C	Sig	nature		Updated		
WRKprked Du	uring Holid	ay		1.	000	Cherry		14/09	/16 16:00		
I											



4.1.1. One-Off Extra Entitlement

## Personnel File

I								Genera	l i	Position	a & Team	A
* Ei	mployee	ID	0				3	User		0	Cherry	
<b>*</b> IC	0 Numbe	r	333333	33333				First Na	ne			
* Fi	ull Name		Cherry	Cherry				Surnam	е			
ļ –								Name (L	ang 2)			
								First Na	me (Lang2)			
								Surnam	e (Lang2)			
								API User	Name			
L												
	Start											
Empl	oyee Ho Voor	Holiday Histor	P/E-u-d	One Off Fait	ntitloment	dra Davi	Total Entitle	Head	C/End	1 oft	Doguzatad	
*	rear 2.046	Holiday	B/FW0	One Off Exte		tra Day		Used	C/FWd	Left	Requested	
	2,010	2.000	77.00	0.000	75.000	1.000	00.000	0.000	0.00	80.000	0.000	
												<b>1</b>
						Pr	iority Help	)				
							One-Off Ex	tra:				
							Tick if extra	entitlement	is iust for the	vear in ques	tion. this	
							will increase	e 'Entitlemen	t' but only for	r this year.		
							Leave blani 'Extra Days	k to add extra ' and be carr	a entitlement ied forward t	, this will incr o future years	ease s.	
Į.											ок	
Extra	Holiday	Entitlemer	nts									
*Extr	а	Reaso	on Descript	tion	*Extra D	ay:One-(	. Sig	nature		Updated		
WRK	Worke	d During Holid	ay		1.0	00 🔽	Cherry		14/0	9/16 16:00		
1												
_												



#### 4.2. Using Extra Holiday Absence (Optional)

Same as for holiday but select the extra holiday absence code.

							G	Seneral	Pos	ition & <sup>-</sup>	Team	Address	& Phone	Definitions	
* Employee I	ID	0					3 Us	er		Che	erry		Title		
* ID Number	r	3	333333333				Fir	st Name					Title (Lang 2)		
* Full Name		С	herry Cherry				Su	irname					Gender		F
							Na	ime (Lang 2)					Gender Desc.		Fen
_	a						Fir	st Name (Lang	12)				Inactive Empl	loyee	
							Su	irname (Lang2	)				Attachments?		
-	' I														
							AP	I User Name							
							AP	'I User Name							
Start							AP	I User Name					_		
Start aves of Abs	sence T	Tasks fo	or Document	Remar	ks Att	achments	AP Set Up Sk	1 User Name	y of State	uses	To Do Item	listory of Chai	nges Calendar of	f Employee Abser	nces
Start aves of Abs From Date F	sence T From Hour	Tasks fo	or Document *To Date	Remar To Hour	ks Att	achments :xclu(Absenc	AP Set Up Sk Reason fo	Y User Name <b>Cype Histor</b> or Absence Pe	y of State	u <b>ses</b> Days	To Do Item	listory of Char	rges Calendar of Time Stamp	f Employee Abser Request No.	nces
Start aves of Abs From Date F 4/09/16	sence T From Hour 09:00	Tasks fo IFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	achments xclu(Absenc 02	AP Set Up Sk Reason fo Z liday	Y User Name Histor PrAbsence Pr	y of Statu ortion o 0.00	uses Days 1.00	To Do Item 3 Signa Cherry	listory of Chai	nges Calendar of Time Stamp 14/09/16 10:51	f Employee Abser Request No.	nces
Start aves of Abs From Date F 4/09/16	sence T From Hour 09:00	Tasks fo IFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	tachments Exclu(Absenc	Set Up Sk Reason fo	Y User Name Histor or Absence Pe	y of Statu ortion o 0.00	uses Days 1.00	To Do Item <sup>O</sup> Sign: 0 Cherry	listory of Chai	nges Calendar of Time Stamp 14/09/16 10:51	f Employee Abser Request No.	ices
Start aves of Abs From Date f 4/09/16	sence T From Hour 09:00	Tasks fo IIFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	tachments Exclu(Absenc	AP Set Up Sk Reason fo	I User Name Histor or Absence Pe	y of Statu ortion o 0.00	Days 1.00	To Do Item 1 <sup>3</sup> Sign 0 Cherry	listory of Char ature	rime Stamp 14/09/16 10:51	f Employee Abser Request No.	nces
Start aves of Abs From Date f 4/09/16	sence T From Hour 09:00	Tasks fo IIFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	tachments ExcluiAbsenc	AP Set Up Sk Reason fo ∑ liday Holida	I User Name Histor I Absence Po	y of Statu ortion o 0.00	uses Days 1.00	To Do Item <sup>O</sup> Sign: O Cherry	tistory of Char	nges Calendar of Time Stamp 14/09/16 10:51	F Employee Abser Request No.	ices
Start aves of Abs From Date F 1/09/16	sence T From Hour 09:00	Tasks fo IIFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	ExclueAbsence	AP Set Up Sk Reason fo Iiday	I User Name Histor r Absence Pe Ce Code Dr Heace	y of Statu ortion o 0.00 escription	Days 1.00	To Do Item Sign O Cherry	listory of Chai	nges Calendar of Time Stamp 14/09/16 10:51	f Employee Abser Request No.	ices
Start aves of Abs From Date f 4/09/16	sence T From Hour 09:00	Tasks fo uFrom D Wed	or Document *To Date 14/09/16	Remar To Hour 17:00	ks Att To Day E Wed	xachments ExcluiAbsenc 02	AP Set Up Sk Reason fo ∑ liday Holida Absen 01 02	I User Name Histor PrAbsence Ce Code Holday	y of Statu ortion o 0.00 escription	uses Days 1.00	To Do Item Sign Cheny	iistory of Chai	nges Calendar of Time Stamp 14/09/16 10:51	f Employee Abser Request No.	ices
Start aves of Abs From Date f 4/09/16	sence T From Hour 09:00	Tasks fo IFrom D Wed	or Document *To Date 14/09/16	Reman To Hour 17:00	ks Att	Exclu(Absenc	AP Set Up Sk Reason fo Vilday Holida Absen 01 02	I User Name Histor or Absence Pr Ce Code Dr Illness Holiday	y of Statu ortion o 0.00 escription	uses Days 1.00	To Do Item 3 G Sign Cherry	tistory of Char	riges Calendar of Time Stamp 14/09/16 10:51	Employee Abser Request No.	ices

#### 4.3. Employee Holiday History reflects above entries:

NB. Extra Days are recorded separately for the year in which they are added but are added to Holiday entitlement when calculating holiday taken forward to next year.

#### **Personnel File**

						Genera	1	Position	n & Team
*Employee ID	0				3	User		0	Cherry
*ID Number	333	3333333				First Na	me		
* Full Name	Ch	erry Cherry				Surnam	e		
						Name (L	ang 2)		
						First Na	me (Lang2)		
						Surnam	e (Lang2)		
						API Use	r Name		
Start									
mployee Holiday Histor	y								
*Year Holiday	B/Fw	d One Off E	xtEntitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested
2,015 34.000	0	.00 0.00	0 34.000	0.000	34.000	0.000	0.00	34.000	0.000
2,016 2.000	77	.00 0.00	0 79.000	1.000	80.000	0.000	0.00	80.000	0.000



### 5. Holiday Requests

1.1.1.1

These can be maintained using the new holiday request form on the new menu: Human Resources > Employee Holidays > Holiday Requests

If an employee is not a Holiday Authorizer for any other employees, then he/she can only see and create/amend his/her own holiday requests.

#### 5.1. Adding a Holiday Request

ł	Holiday Re	equests												< 🕅 🖾 🏱 🖻
i	Request No.	*User Name	*From Date	From D	*From Ho	*To Date	*To Hour	To Day	Days	Left	Holiday Group(s)	*Status	• Signature	Authoriser
		Cherry	1	iii i	00:00		00:00		0.000	0.000	Office A	Draft		
L.														
μ														
L.														
Ľ														
L.														
Ľ														
l.														
Ľ														
۰.														

- 5.1.1.User Name select or enter the user required, if you are not a holiday authorizer then only your name will be valid.
- 5.1.2.Enter holiday date/times and leave status as Draft
  - 5.1.2.1. The form shows the number of day's holiday this would deduct from entitlement and the entitlement left if this holiday request has been set to requested status. Once approved this will show the new balance.

Holiday Re	equests												< 🗊 🖄 🖻	୭ ≣ ± < ☆ ×
Request No.	O *User Name	*From Date	From D	*From Ho	*To Date	*To Hour	To Day	Days	Left	Holiday Group(s)	*Status	• Signature	Authoriser	Timestamp
20160003	Cherry	20/09/16	Tue	09:00	22/09/16	17:00	Thu	3.000	80.000	Office A	Draft	<b>_</b> erry	Cherry Cherry	15/09/16 14:12

- 5.1.3. When required employee can change the status to Requested, a BPM rule could be added to email the details to an appropriate person.
- 5.1.4.The Employee Holiday History will reflect the requested quantity.

Holiuay	Reque	515												< 🖬 🖄 🗠	୭ 🗏 🗄 ୦ ☆ 🗙
Request No	). • <b>*</b> Us	ser Name	*From D	ate From	D <b>*From</b> Ha	*To Date	*To Hour	To Day	Days	Left	Holiday Group(s)	*Status	• Signature	Authoriser	Timestamp
20160003	Cherry		20/09/16	Tue	09:00	22/09/16	17:00	Thu	3.000	77.000	Office A	Requested	Cherry	Cherry Cherry	15/09/16 14:12
1															<b>,</b>
Calendar of E	mployee Ho	olidays	Employee I	Ioliday Hi	story Co	mment H	story of S	tatuses	To Do I	tem					
Year	Holiday	B/Fwd	One Off ExtE	ntitlement	Extra Days	Used	C/Fwd	Left	Requeste	ed					
2,015	34.000	0.00	0.000	34.000	0.000	0.000	0.00	34.000	0.00	0					
2,016	2.000	77.00	0.000	79.000	1.000	0.000	0.00	80.000	3.00	0					

5.1.5.Once Request is at Requested status it cannot be amended but the employee can change status to Cancelled.



- - -

FUTURE PROOF YOUR BUSINESS

#### 5.2. Authorizing a Holiday Request

- 5.2.1. Any Employee marked as being an Authoriser for another employee may find any existing holiday requests for him /herself plus those of employees for whom he/she is an authorizer and change its status to Approved or Rejected.
- 5.2.2.. The Employee Holiday History will reflect the approved quantity.

Holiday	Reque	ests												< 1 🗷 🖻	୭ ≣ ∄ < ☆
Request No	. <sup>●</sup> ★U	ser Name	*From Da	te From	D <mark>*</mark> From Ho	*To Date	*To Hour	To Day	Days	Left	Holiday Group(s)	*Status	• Signature	Authoriser	Timestamp
20160003	Cherry		20/09/16	Tue	09:00	22/09/16	17:00	Thu	3.000	77.000	Office A	Approved	Cherry	Cherry Cherry	15/09/16 14:13
Calendar of F	mplovee Ho	olidays	Employee Ho	liday Hi	tory Co	mment H	istory of St	tatuses	To Do I	tem					
Year	Holiday	B/Fwd	One Off ExtEn	titlement	Extra Days	Used	C/Fwd	Left	Requeste	ed					
2,015	34.000	0.00	0.000	34.000	0.000	0.000	0.00	34.000	0.00	0					
2,016	2.000	77.00	0.000	79.000	1.000	3.000	0.00	77.000	0.00	0					

## 5.2.3. An entry in Calendar of Employee Absences will have automatically been made.

induy	1 toquo														< 🗉 🗵	PDEEQTD
Request N	o. 🔍 *Us	er Name	*From Date	From D	*From Ho	*To Da	te <mark>*</mark> T	o Hour	To Day	Days	Left	Holiday Group(s)	*Status	• Signature	Authoriser	Timestamp
20160003	Cherry	2	20/09/16	Tue	09:00	22/09/16	17	:00	Thu	3.000	77.000	Office A	Approved	Cherry	Cherry Cherry	15/09/16 14:13
Calendar of E	mployee Ho	<mark>idays</mark> Emp	ployee Holid	lay Hist	tory Cor	nment	Histor	y of Sta	atuses	To Do I	tem					
From Date	From HoulFro	n D To Dat	te To Hou	r To Da	ay Days	ZEMGA	bsence	Reaso	n for At	osence P	ortion o	Signature	Time Star	mp Request	No.	
20/09/16	09:00 Tu	22/09/16	17:00	Thu	3.0	00	01	Illness			0.00 Che	rry	15/09/16 14:13	20160003	Q	



#### 5.3. Holiday Request Comments

5.3.1.Comments can be added to a Holiday request at draft status or at any status by a holiday authoriser. Holiday Requests

													• • • • F	
Request No.	*User Name	*From Date	From D	*From Ho	*To Date	*To Hour	To Day	Days	Left	Holiday Group(s)	*Status	<ul> <li>Signature</li> </ul>	Authoriser	Timestamp
20160003	Cherry	20/09/16	Tue	09:00	22/09/16	17:00	Thu	3.000	77.000	Office A	Approved	Cherry	Cherry Cherry	15/09/16 14:13
4														. l
Calendar of Empl	loyee Holidays En	nployee Holid	lay Hist	tory Co	mment His	tory of St	tatuses	To Do I	tem					
						= -=	-1							
Font	✓ Size ✓ Color	<u>∨</u> <u>A</u> ∦ ≞∎	ВТ	<u>⊓</u> ⊓ A	A' ==== }	= 1= 1# 1/		M 16	8					
Approved and en	tered on Wallchart													

#### 5.4. Holiday Group Warnings

- 5.4.1.Whenever any employee enters or amends a holiday request for an employee and other employees in either of that employee's holiday groups have holiday requests entered with overlapping dates a warning if given showing the number of other employees whose holiday dates clash **BUT** only if the number of employees exceeds the warning level set for any of the employee's holiday groups.
- 5.4.2.But the request can still be processed in any way required.
- 5.4.3.

#### 5.5. Holiday Group Leader Email

5.5.1.An email will be sent to the holiday group leader for each of the employee's holiday groups if a group leader has been defined and the holiday request is being approved or if holiday group is set-up such also when request is requested.



## 6. Calendar of Employee Absences Report

#### This can be accessed using the new menu:

*Human Resources > Employee Holidays > Calendar of Employee Absences* 

Parame	ter Input						×			
Report	shows employe	ee absences.								
User Nan	ne = 🗸	*					<b>_</b>			
From Dat	e = 🗸						<b>***</b>			
To Date	= 🗸									
Absence	Code = 🗸			<b>_</b>						
Clea	Г									
				OK	Cancel	H	elp			
🔸 🖾 🖉 🔯 🛛	¥ 🔔				Priority Demo - Me	edatech UK -SQL		-		
Aplha Delta Co (Demo Versio 15/09/16 14:19 User Name '*'	n), Cherry Cherry				Calendar of Emp	lovee Absences				
User Name	From Date	From Hour	From Day	To Date	To Hour	To Day	Days	Absence Code	Reason for Absence	Request No.
Cherry	14/09/16	09:00	Wed	14/09/16	17:00	Wed	1.000	02	Holiday	
Cherry	20/09/16	09:00	Tue	22/09/16	17:00	Thu	3.000	01	Illness	20160003

## 7. Employees on Holiday Report

#### This can be accessed using the new menu:

Human Resources > Employee Holidays > Employees on Holiday Report

Parameter Input	×
Report shows which employees have holiday booked between entered dates.	
From Date = V start of this month	<b>***</b>
To Date = 🖂 end of this month	
Clear	
OK Cancel	Help

This report shows all employees who have holiday, either created by approved holiday requests or entered directly into Calendar of Employee Absences form, which overlap the entered date range:

🔸 🖾 🙋	承 🔔									
Aplha Delta Co (Demo Vers 15/09/16 14:20 From Date 01/09/16, To Da	ion), Cherry Cherry te 30/09/16		Pror	ty Demo - Medatech UK -S	ac					
			Emple For per	oyees on Holiday Rep iod: 01/09/2016-30/09	port /2016					
User Name	Holiday Group 1	Holiday Group 2	Holiday Group 3	From Date	From Hour	From Day	To Date	To Hour	To Day	Request No.
Cherry	Office A			20/09/16	09:00	Tue	22/09/16	17:00	Thu	20160003



### 8. Employee Holiday Requests Report

#### This can be access using the new menu:

Human Resources > Employee Holidays > Employee Holiday Requests Report

Parameter Input			X
Report shows employee holiday reque	sts.		
From Date = V 01/01/16			t
To Date = V 01/01/17			<b>**</b>
Clear			
	ОК	Cancel	Help

This report shows all employees who have holiday requests at Draft, Requested or Approved statuses which overlap the entered date range:

Aplha Delta Co (Demo Version 15/09/16 14:34 From Date 01/01/16. To Date	), Cherry Cherry 1), Cherry Cherry			Priority	Demo - Medatech UK -S	SQL									
	m Date 01/01/16, To Date 01/01/17 Employee Holiday Reguests Report For period: 01/01/2016-01/01/2017														
User Name	Request No.	From Date	From Hour	To Date	To Hour	Days	Status	Assigned To	Signature	Timestamp					
Cherry	20160001	16/09/16	09:00	16/09/16	17:00	1.000	<u>Draft</u>	Cherry	Cherry	14/09/16 16:11					
Cherry	20160003	20/09/16	09:00	22/09/16	17:00	3.000	Approved	Cherry	Cherry	15/09/16 14:13					
Cherry	20160002	30/09/16	09:00	30/09/16	17:00	1.000	Draft	Cherry	Cherry	14/09/16 16:12					
Cherry	20160004	27/10/16	09:00	27/10/16	17:00	1.000	Requested	Cherry	Cherry	15/09/16 14:32					

## 9. Holiday Forward Entitlement

When you want to setup the annual holiday entitlement for the next calendar year you can use the Holiday Forward Entitlement direct activation on the form:

Human Resources > Personnel File

Person	nel File	•												< 1 4 > 9 = -	$\exists \land \Diamond \times$	E Form Navigation	~
							Genera	ıl	Positio	n & Team	Address	s & Phone	Definitions	Assigned to	Misc.	Aplha Delta	Co
* Employee	ID	• 3				-	User		0	Cherry		Title		Ms.		<ul> <li>Employee ID</li> </ul>	
* ID Numbe	r	333333	33333				First Na	me				Title (Lang 2)		Ms.		Line 1 / 1	
* Full Name		Cherry	Cherry				Surnam	e		Berry		Gender		F			
							Name (I	Lang 2)				Gender Desc.		Female			
	-						First Na	me (Lang2)				Inactive Emplo	yee				
							Surnam	e (Lang2)				Attachments?					
							API Use	r Name							- I I		
																Direct Activations	~
Start																Change Employee's Comp	any
Employee Ho	oliday Histo	ry													1 2 3 4 5	Copy Position to Employee	's Log
*Year	Holiday	B/Fwd	One Off Ext	Entitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested						Define as Internet User	
2,015	34.000	0.00	0.000	34.000	0.000	34.000	0.000	0.00	34.000	0.000						Open Payroll Data for Employee DDM Flaw Chart Employee	loyee
2,016	2.000	77.00	0.000	79.000	1.000	80.000	3.000	0.00	77.000	1.000						Employee Wizard	15
2,017	3.000	0.00	0.000	3.000	0.000	3.000	0.000	0.00	3.000	0.000						w Open Personnel File Wiza	d
																P Forward Holiday Entitleme	nts
																Recalculate Holiday Value	
																Calc. Employees Bradford	Scale
																Scan and Attach to Employ	'ee



9.3.

#### 9.1. Enter the New Year number.

This routine	will clear any valu	ies from the sub-le	evel "Extra Ho	oliday Entitlemer	nts" for the
entitlement	o then recalculate constant.	entitlements base	d on the prev	ious year and/or	the defau
Vear	0047				
	2017				
Clear					

9.2. The procedure will then create records for **all** active employees' details in Employment Holiday History adding any extra holiday entitlement into the current year's entitlement and carrying forward any unused holiday up to the limit set in the constant.

Personr	nel File	•												( i @ þ 9	≣ ∄ Q ☆ ×
							Genera	al	Positio	n & Team	Address	& Phone	Definitions	Assigned	to Misc.
* Employee	ID	0				3	User		٥	Cherry		Title		Ms.	
*ID Numbe	r	33333	33333				First Na	me				Title (Lang 2	)	Ms.	
* Full Name		Cherry	y Cherry				Surnam	e		Berry		Gender		F	
							Name (I	Lang 2)				Gender Desc		Female	
							First Na	me (Lang2)				Inactive Emp	loyee		
							Surnam	e (Lang2)				Attachments	?		
							API Use	r Name							
Start															
Employee Ho	liday Histo	ry													1 2 3 4 5
*Year	Holiday	B/Fwd	One Off Ex	tEntitlemen	t Extra Days	Total Entitle	Used	C/Fwd	Left	Requested					
2,015	34.000	0.00	0.000	34.000	0.000	34.000	0.000	0.00	34.000	0.000					
2,016	2.000	77.00	0.000	79.000	1.000	80.000	3.000	0.00	77.000	1.000					
2,017	3.000	0.00	0.000	3.000	0.000	3.000	0.000	0.00	3.000	0.000					
2,018	3.000	0.00	0.000	3.000	0.000	3.000	0.000	0.00	3.000	0.000					

- 9.4. Holiday entries could still be made into the previous year and the procedure run again to update the new year values.
- 9.5. The Brought Forward (B/Fwd) value for the new year can be adjusted if required.

#### 10. Holiday History Recalculation

If at any time you wish to recalculate the holiday history for any given year based on the calendar of absences, then you can use the direct activation on the form: Human Resources > Personnel File

Person	nel File													< 1 1 1 1 5 5	€⊂☆×	E Form Na	avigation
							Genera	i	Positior	n & Team	Addres	s & Phone	Definitions	Assigned to	Misc.	Pe	Apiha Delta Co
* Employee	ID	•				<b>_</b>	User		٥	Cherry		Title		Ms.			Employee ID
* ID Numbe	r	333333	13333				First Na	me				Title (Lang 2)		Ms.			Line 1 / 1
* Full Name		Cherry	Cherry				Surnam	e		Berry		Gender		F			
							Name (L	.ang 2)				Gender Desc.		Female			
	-						First Na	me (Lang2)				Inactive Empl	loyee				
							Surnam	e (Lang2)				Attachments?					
	'						API Use	r Name									
																Direct A	ctivations
Start																₽ Ch	anne Employee's Company
Employee Ho	liday Histo	7 <b>V</b>													12345	P Co	py Position to Employee's Log
*Year	Holiday	B/Fwd	One Off Ext	Entitlement	Extra Days	Total Entitle	Used	C/Fwd	Left	Requested						P De	fine as Internet User
2,015	34.000	0.00	0.000	34.000	0.000	34.000	0.000	0.00	34.000	0.000						P Op	en Payroll Data for Employee
2,016	2.000	77.00	0.000	79.000	1.000	80.000	3.000	0.00	77.000	1.000						w Em	wi Flow Chart-Employees
2,017	3.000	0.00	0.000	3.000	0.000	3.000	0.000	0.00	3.000	0.000						w Op	en Personnel File Wizard
2,018	3.000	0.00	0.000	3.000	0.000	3.000	0.000	0.00	3.000	0.000						₽ Fo	rward Holiday Entitlements
																P Re	calculate Holiday Values Ic. Employees Bradford Scale
																P Sc	an and Attach to Employee



### 11. Compulsory Holidays

If you wish to allocate compulsory holidays to all employees (E.G. Factory Shutdown) then use the procedure: *Human Resources > Employee Holidays > Compulsory Employee Holidays* 

Parameter Input	X
Use this procedure to automatically allocate annual leave to selected employees. E.G. For factory shutdown period. N.B. This is deducted from annual leave entitlement.	
Employees = V *	
From Date = V 01/12/16	
To Date = 🗸 31/12/16	
Clear	
OK Cancel Help	

Select any Employees required or \* for all active employees, from and to dates then approve. A report showing the success or failure for each employee will display.



Aplha Delta Co (Demo Version), Cherry Cherry 15/09/16 14:40 Employees \*, From Date 01/12/16, To Date 31/12/16 Priority Demo - Medatech UK -SQL

**Compulsory Employee Holidays** 

Message

Manager Compulsory holiday added for 01/12/16 - 31/12/16 Ash Ketchum Compulsory holiday added for 01/12/16 - 31/12/16 Meow Compulsory holiday added for 01/12/16 - 31/12/16 Cherry Cherry Compulsory holiday added for 01/12/16 - 31/12/16



### 12. Bradford Scale

#### 12.1. Showing Scale for individual Employee

User direct action on the form: *Human Resources > Personnel File* Personnel File

Person	nel Fi	e																A Δ ×	E Form Navigation	~
									General	Po	sition & 1	「eam	Addre	ss & Phon	e	Definitions	Assigned to	Misc.	Apiha Delta Co	
* Employee * ID Numbe * Full Name	ID Fr	0 : (	333333333 Cherry Cherry					<b>_</b>	User First Name Surname		Che Berr	rny Y		T T G	itle itle (Lang 2) Sender		Ms. Ms. F		<ul> <li>Personnel File</li> <li>Employee ID</li> <li>Line 1 / 1</li> </ul>	
Start									Name (Lang 2 First Name (La Surname (Lan API User Nam	:) ang2) g2) e				I A	Gender Desc. nactive Empl	loyee	r emale		Direct Activations	~
Leaves of Ab	sence	Fasks fo	or Document	Remar	ks A	ttach	ments	Set U	p Skype Hist	ory of Stat	uses	To Do It	tem History of Cha	nges 🖸	C <mark>alendar of</mark>	Employee Absenc	es 1 2	3 4 5	Change Employee's Company     Copy Position to Employee's Lo     Define an interact lines	)g
14/09/16 20/09/16 01/12/16	09:00 09:00 09:00	Wed Tue Thu	14/09/16 22/09/16 31/12/16	17:00 17:00 00:00	Wed Thu Sat		02 01 01	Holiday Illness Illness	on for Absence	0.00	1.000 3.000 0.000	Cherry Cherry Cherry	Signature	14/09/16 15/09/16 15/09/16	10:51 14:13 14:40	20160003			Define as Internet User     Open Payroll Data for Employe     BPM Flow Chart-Employees     Employee Wizard     Vopen Personnel File Wizard     Forward Holiday Entitlements	e
																			P Recalculate Holiday Values     P Calc. Employees Bradford Scal     P Scan and Attach to Employee	e

#### Override defaulted date range of previous year if required:

Parameter Input	×
This procedure calculates the Bradford scale for this Employee between the entered. Each working day (even partial days) absence (with reason marked in bradford scale calculation) is treated as a days absence as per the standa scale calculation.	dates d as included ard Bradford
From Date = 05/09/15	
Clear	
OK Cancel	Help

#### Bradford scale is displayed:

Cal	c. Employees Bradford Scale		
1	Bradford Scale for Cherry Cherry over 05/09/15 - 15/09 is 0		
	ОК		

## MEDATECH

<u>Tel : + 44 (0) 845 230 6740</u> E-mail: <u>info@Medatechuk.com</u> <u>http://www. Medatechuk.com</u>

#### FUTURE PROOF YOUR BUSINESS

#### 12.2. Reporting Scale for Employees

#### Run report: Human Resources > HR Reports > Employees Bradford Scale Report

Parameter Input	×
This report calculates the Bradford scale for selected Employees between the dates entered. Each working day (even partial days) absence (with reason marked as included in bradford scale calculation) is treated as a days absence as per the standard Bradford scale calculation.	
Employee Name = 🗸 *	<b>_</b>
From Date = Start of this year	<b>:::</b>
To Date = end of this year	
Clear	
OK Cancel He	p

#### Select employees and defined date range and report shows values: -

beleet employees and defined date fange and report blows values.								
Image: Priority Demo - Medatech UK - SQL       Apiha Detta Co (Demo Version), Cherry Cherry       15/09/16 14:44       Employee Name*, From Date 01/01/16, To Date 31/12/16								
Employees Bradford Scale Report								
Employee Name	No. Spells Absent	Total Days Absent	Bradford Scale					
Manager	0	0	0					
Ash Ketchum	0	0	0					
Meow	0	0	0					
Cherry Cherry	0	0	0					