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My TIME – LEAVE (ABSENCE)

OVERVIEW

Although the Time Management module includes Absences and Entitlements (Claims) this manual will cover Absence - LEAVE. This includes:

- Holiday
- Bank Holidays
- Flexi
- Paid Leave
- Unpaid Leave

Each of these will be explained in more depth in this manual

As with all time related claims and requests you can access this via My Time

My Time

The options available to an employee under this menu are:

My Time

My Time Management

My Leave Entitlements

My Absence History

My Hours Claim History

My TIME MANAGEMENT

The My Time Management option is the main menu.

It displays a list of your absence requests already made (split under status categories).

It also links to the views where you request absence.



The statuses of existing claims are:

Open – these are requests that have been created – but not yet submitted for authorisation. Until the request is submitted your Manager will not be aware that it exists. A reminder of any 'Open' requests can also be found on one of your Dashboard widget, Forms waiting submission

Forms Waiting Submission	^ x
Expense Claims (1)	V

- Submitted these are requests that have been submitted and are awaiting your Manager's action
- Authorised these are requests that your Manager has authorised and are being processed
- **Withdrawn** these are requests that you have *submitted* but subsequently decided to withdraw. Withdrawn claims can be reverted to an Open state.
- **Rejected** these requests have been rejected by your manager.

There are two calendar views available to view and/or input:

Time Management - Employee View Time Management - Calendar View

Employee View (recommended) and Calendar View

TIME MANAGEMENT - EMPLOYEE VIEW

Contract Type: Contract Status: Contracted Hours:	APT&C and Permanent 37	d Teachers		Bank Holida	y:	Outstanding Bala 0.1 Hours	inces Ho	oliday:		199.9 Hours							
< Previous								Week Endin	29	/10/2016							Next >
	Su	unday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday			
Week Ending	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Type	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Category	c	omments
17/09/2016	FLX	0.00	FLX	7.40	FLX	7.40										Flexi	
24/09/2016							HOL	7.40									
01/10/2016											FLX	3.70				Flexi	
08/10/2016																	
15/10/2016											FLX	7.40				Flexi	
22/10/2016																	
29/10/2016																	
05/11/2016											HOL	7.40	HOL	0.00		Holiday	
12/11/2016	HOL	0.00	HOL	7.40	HOL	7.40	HOL	7.40	HOL	7.40	HOL	7.40				Holiday	
19/11/2016			HOL	7.40												Holiday	
26/11/2016																	
03/12/2016																	
10/12/2016																	
Previous														View Enti	tlement Details	View Full Screen	Print Cance

The top of the screen displays the employee contract details alongside Holiday and Bank Holiday entitlement. (Information on why Bank Holiday entitlement is shown will be included further in this manual).

Note: All leave entitlement is now shown in hours (and not days). This will allow the system to accurately calculate your entitlement regardless of whether you are Full Time or Part Time (or move between the two). Further notes about booking Bank Holidays can be found below

The screen defaults to the current week but also shows a number of prior weeks and future weeks. Depending on your screen size you may find the View Full Screen button useful.

(Depending on the web browser you use you are also able to use the Zoom tool to make this screen larger (although you will then need to use the scroll bars))

Week Ending dates (Saturday) are listed in the first column and the days of the week in the remaining columns.

The **Previous** and **Next** buttons update the list to display additional weeks (in the past or future respectively).

This screen will show the history of previous requests made with unauthorised claims shown in GREEN

MAKING A REQUEST FOR ABSENCE

- Double click or right click
- Select Add
- Pick an option from the selection list

If the box already has some previously entered information you will be able to right click and choose either Add / View / Edit / Delete

Further information on these actions will follow **below**

Wednesday Thursday Hrs/Cash Type Hrs/Cash HOL 7.40 HOL 7.40 HOL View 80.00 Edit Delete

Click on View Entitlement Details to display either Holiday or Bank Holiday entitlement

- Click on the drop-down button Select Absence Type
- Select either Holiday or Bank Holiday
- This screen shows how your entitlement has been calculated including any carry forward from the previous financial year if applicable.

EXPLANATION OF HOLIDAY

ENTITLEMENT CALCULATIONS

Select Absence Type Holiday
Entitlement Period from 01/09/2016 to 31/03/2017
Post :HR Systems Officer As at Date :28/10/2016 Unit Type :Hours
Entitlement:129Carry Forward:189.3Carry Forward Used:118.4Carry Forward Use By Date:31/03/2017Taken:7.4Booked:111Current Balance:310.9Outstanding Balance:199.9

Entitlement	Your holiday entitlement is calculated automatically each year based on your contract and length of service. Holiday entitlement is covered in the Leave Arrangement Policy which can be found in My View / My Documents/ Policies
Carry Forward	Again this is automatically calculated based on the remainder in the previous year. This will be limited as per the policy for carry forward. Any carry forward more than the limits specified in the policy will need to be authorised by a Director, AD or Executive Head and managed locally.
Carry Forward Used	The system will automatically use up the carry forward first when booking leave. Any leave carried forward should be taken by 31st May.
Taken	This shows the hours of leave that have been booked, authorised and taken (i.e. leave on dates prior to the current date).
Booked	This balance represents leave that has been authorised for a future date. Note – holiday does not show until it has been authorised

Current Balance	(Entitlement + Carry Forward) - Taken
Outstanding Balance	(Entitlement + Carry Forward(– (Taken + Booked)

There are several different types of absence (leave) set up in the system that you may be able to request. These are dependent on your Post and Service Conditions.

- Right click on the calendar and select Add
- Select from the drop down list.

Please refer to the **Leave Arrangement Policy** for more detail on the guidance for each of these. The current list includes:

Bank Holiday	Bank Holiday entitlement is automatically calculated by the system based on your employment contract and hours/days worked. As some staff may work on Bank Holidays it's now necessary for all employees to request leave when a bank holiday is being taken. If the employee works on a bank holiday then they should use this absence option on the next requested absence after the bank holiday. For a standard 37hr employee with a regular work pattern of 7.4hrs per day (Monday – Friday) they could pre-book all bank holidays at the start of the year.
Flexi	The system will allow you to book Flexi Leave in accordance with the Leave Management Policy, but does not hold or calculate any flexi balances .It is therefore necessary to check that you have the required credit available (from the Time Recording System or other method of recording your team may use) before you request the leave. Your manager should also check this before authorising the request. Flexi Leave requests will not affect your leave entitlement balance.
Holiday	This is the standard annual leave and is calculated by the system based on your employment contract and hours/days worked.
Paid Leave - Discretionary	 There are a number of reasons why you may be able to request 'Paid Leave'. Select Paid Leave from the drop down list and then select the reason for the paid leave:

	Select Compassionate Leave Court Appearance other than Jury Service Dental Visit Doctors Appointment Fertility Treatment Flexi Leave - when credit is available Garden Leave Governor Duties Hospital Appointment Interview During Redundancy Jury Service Medical Suspension Occupational Health/Counselling Other - Agreed with Manager in Advance Parental Leave other than Mat/Pat/Adopt Redundancy Leave Religious Observance Relocation Sabbatical Leave	
	You will also be able to select 'Other' but it discussed the reason for this with your manag Paid Leave requests will not affect your leave	t is essential that you have er first. entitlement balance.
Unpaid Leave - Discretionary	In accordance with the Leave Arrangement with your manager you may be entitled to take	policy and with agreement e 'Unpaid Leave'.
	• Select Unpaid Leave from the drop dow reason for the unpaid leave: Career Break	or Inclement Weather.
	You will also be able to select 'Other' but it discussed the reason for this with your manag	t is essential that you have er first.
	Un-Paid Leave requests will not affect your le	eave entitlement balance.

Note: If any option selected does not match the employee's type of contract, the following error message is displayed.

· Selected attendance type is not valid for this employee on this date.

For example an employee with a Teacher contract may not be able to book leave.

From the menus above you should now be in a position to have checked your entitlement and decided which type of leave you are requesting. The following screens are similar for all types of leave but the Paid & Un-Paid leave request will also require you to select the reason code.

Error

Comments: This is for your information and is free text. You may wish to enter your leave destination so that you can recognise it from other leave requests in the future

My Time ABSENCE for Employees

uie Spence (24968)			
e see the 'Guidance'			
Holiday			
<u>Dates</u>	<u>Full Day Part Da</u>	y <u>Time</u>	Hours off
15/04/2016			
	• •		
hours mins	hrs decimal 0.00	Confirm	planned work tim
	uie Spence (24968) e see the 'Guidance' Holiday Dates 15/04/2016 hours mins	uie Spence (24968) e see the 'Guidance' Holiday Dates Full Day Part Da 15/04/2016 @ O hours mins hrs decimal 0.00	e see the 'Guidance' Holiday Dates Full Day Part Day Time 15/04/2016 © O hours mins hrs decimal 0.00 Confirm

Dates: Although you will have selected the **From** date on the original calendar you can change it as this point if required. Also enter the **To** date. As leave entitlement is now calculated in hours you can book leave in hours.

- Select the 'Part Day' button. Further boxes now become available
- Enter the time you are leaving (or starting) i.e. 13.30
- Enter the hours and minutes you are requesting as leave.

Dates	Full Day Part Day	Time Hours off
		e.g. 15:30 for half hh mm hrs decimal past three
16/04/2016	H O O	0.00
hours mins	hrs decimal 0.00	Confirm planned work time

Confirm planned work time: Before submitting an absence request the user must click on this option to confirm that the hours worked per week are recorded correctly. This work pattern affects your entitlement and reductions and if necessary changes can be made to the work pattern for the week in question. This work pattern must be equivalent to your contracted weekly hours. (Where your holiday request crosses more than one week, all weekly work patterns will be displayed).

Note – Although you are able to change your hours on your work pattern you are not able to increase or decrease the total hours recorded for the week (contracted hours).

If the total hours or basic work pattern is incorrect please discuss with your manager as this can be updated by HR Admin

From	26/09/2010	5 Enter All We	eeks 💿										
То	Fo 28/09/2016 Recurring Pattern 🔘 Repeat WeeksSelect 🔻												
	SUN	MON	TUE	WED	тни	FRI	SAT	Weekly Hours					
Week Ending	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hours	mins	hrs decimal			
01/10/2016	0:00	7:24	7:24	7:24	7:24	7:24	0:00	37	0	37.00			

- Click **Save** to confirm the work time. The user may see an Alert on screen. Action the alert to rectify the issue before continuing.
- You will then be returned to your request where you can either-
- Submit the form or Cancel
- When the message 'You have successfully submitted the absence record' is displayed, click Close.

Contract Type: Contract Status: Contracted Hours:	APT&C an Permanen 37	d Teachers t		Bank Holida	ıy:	Outstanding Bala 0.1 Hours	nces Ho	oliday:		199.9 Hours							
< Previous								Week Ending	29	9/10/2016 📅							Next >
	5	unday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday			
Week Ending	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash	Category		Comments
17/09/2016	FLX	0.00	FLX	7.40	FLX	7.40										Flexi	
24/09/2016							HOL	7.40									
01/10/2016											FLX	3.70				Flexi	
08/10/2016																	
15/10/2016											FLX	7.40				Flexi	
22/10/2016																	
29/10/2016																	
05/11/2016											HOL	7.40	HOL	0.00		Holiday	
12/11/2016	HOL	0.00	HOL	7.40	HOL	7.40	HOL	7.40	HOL	7.40	HOL	7.40				Holiday	
19/11/2016			HOL	7.40												Holiday	
26/11/2016																	
03/12/2016																	
10/12/2016																	
Previous														View Ent	itlement Details	View Full Screen	Print Cancel

• Your Holiday will now show on the calendar and will remain in green until authorised

WITHDRAWING SUBMITTED REQUESTS

A holiday request can only be withdrawn if it has not yet been authorised

Time Manageme	nt - Employee View Time Management - Calendar View						
Open							
Submitted							Θ
Created Date	Employee	Type	Description	From	To	Action	
28/10/2016	Louie Spence	HOL	Holiday	26/09/2016	28/09/2016	Add	
Authorised							÷
Withdrawn							Θ
Created Date	Employee	Type	Description	From	To	Action	
28/10/2016	Louie Spence	HOL	Holiday	23/11/2016	23/11/2016	Add	

- From the **My Time Management** screen, click on the relevant form under the **Submitted** section
- Click on Withdraw. The claim is moved to the Withdrawn category on the Time Management screen. This claim then needs to be re-opened for it to be amended or resubmitted

REOPENING WITHDRAWN REQUESTS

- From the **My Time Management** screen, click on the relevant claim from the **Withdrawn** section
- Click on **Re-open**. This will move the claim form to the **Open** section
- With the mouse pointer showing as a hand, click on the claim
- Make the relevant change
- Click Submit

CANCELLING AUTHORISED REQUESTS

To cancel or edit a previously authorised request:

- Open the calendar from the My Time Management / Time Management – Employee View screen
- Right click on the relevant request
- Right click on previously authorised request and select the required option from the drop down list
- Make the relevant change (if required)
- Click Submit
- Deleted (or changed) requests still need to be authorised by your manager

VIEWING ABSENCE REQUESTS

A list of requests can be viewed to check the status and to see if they have been authorised or rejected.

- Click My Time / My Absence History
- Choose the **Status Filter** option to select the categories you wish to display. Select **Search** to confirm the new criteria.
- Use the free text **Keyword Search** to specify an item. Select **Search** to confirm the new criteria.
- Use the **Date from** and **Date to** date fields to specify a date range. Select **Search** to confirm the new criteria.
- Choosing the down arrow will provide more details about the request.
- Click on a request to view or make amendments.

Description	Event	Status	Raised Date 🗸	
Absence (Add): MR Darren Mathers, Holiday (26/09/2016 - 28/09/2016)	Time Mgmt Absence	 Submitted 	28 Oct 2016	~
Absence (Add): MR Louie Spence, Holiday (23/11/2016 - 23/11/2016)	Time Mgmt Absence	O Open	28 Oct 2016	\sim
Absence (Add): MR Darren Mathers, Holiday (21/09/2016 - 21/09/2016)	Time Mgmt Absence	Authorised	27 Oct 2016	\sim
Absence (Add): MR Darren Mathers, Flexi Leave - Whe (27/01/2017 - 30/01/2017)	Time Mgmt Absence	Authorised	18 Oct 2016	\sim

Navigate through the pages/forms using the **arrow buttons**. Number of items to display per screen can be set from 20 to 50.

Using the **arrow** at the end of the request form will supply additional information

Time Mgmt Absence	Employee:	Louie Spence	Туре:	HOL
	Form Number:	00025339	Action:	Add
	Submitted By:	Louie Spence	Start Date:	26/09/2016
	Submitted on:	28 Oct 2016	End Date:	28/09/2016
			Total Time:	22.20000
Authorisation Progress	0	@		

The coloured dots then supply information about the authoriser

	Wednesday		Thursday						
Hrs/Cash	Туре	Hrs/Cash	Туре	Hrs/Cash					
	HOL	7 40	HOL	7 40					
	Add	•							
	1.6								
	R VIEW	80.00							
	Edit								
	Delete								

My Time ABSENCE for Employees

• Available Authorisers	Authorised By										
Managers	Authoriser										
Lisa Hendridge Payroll Manager (20067)	Lisa Hendridge Payroll Manager (20067)	Authorised Date: 6 Oct 2016 Authorised Time: 10:02:29									

TIME MANAGEMENT – CALENDAR VIEW

This is shown mainly for information purposes as although we don't recommend using this view for input you may want to check the calendar and also this screen leads to '**View Team Calendar**'.

• Clicking on Time Management - Calendar View displays the employee absence details.



The bottom of the screen displays the **Types of Absence/Attendance** and alternative options to **Request New** Absence/Attendance and **Open History** of Absence/Attendance (we recommend however that you use **Time Management – Employee View** when submitting requests).

Absence / Attendance												
Туре	Description	<u>Action</u>										
1TO1	1 To 1	Request New	Open 1TO1 History									
ADDHRS	Additional Hours - Above Contract	Request New	Open ADDHRS History									
BHOL	Bank Holiday	Request New	Open BHOL History									
BNKHOL	Bank Hol Enhancement Contracted to Work	Request New	Open BNKHOL History									
CASUAL	Casual Hours - Zero Hours Contract	Request New	Open CASUAL History									
DLVP	Paid Leave - Discretionary	Request New	Open DLVP History									
DLVUP	Unpaid Leave - Discretionary	Request New	Open DLVUP History									
FLEXI	Flexi Leave - When credit is available	Request New	Open FLEXI History									
HOL	Holiday	Request New	Open HOL History									
INDINJ	Industrial Injury	Request New	Open INDINJ History									
PARIS	Paris OOH - IT Dept Only	Request New	Open PARIS History									
SICK	Sickness	Request New	Open SICK History									
STNDBY	Stand By - Minimum of 12 Hours	Request New	Open STNDBY History									
SUPPLY	Supply Hours - Teachers	Request New	Open SUPPLY History									
UNSOC	Unsociable Hours - Hours worked 8pm-6am	Request New	Open UNSOC History									
VENUE	Venue Fee - Registrars	Request New	Open VENUE History									
WKEND	Weekend Enhancement - Contracted to Work	Request New	Open WKEND History									
YTHINC	Youth Hours Including Holiday	Request New	Open YTHINC History									

TEAM CALENDAR

The View Team Calendar is only available via Time Management - Calendar View and shows absence details for all members of your team.

View Team Calendar

I	2016																																												
	October November																																												
													14 1	15 16			20 2	1 22	23 24	25		28 2	29 30 3					6 7			1	0 11			15 1		8 19	20			4 25	26 2			
		i N	10 T	u W					Мо		We		Fr S	Sa Su	Mo		Th Fi		a Su Mo		i We	<u>₽</u> S	Sa Su N	/o 1	Tu We			Su 1	vlo '	Tu W	e Tl		Sa	Мо	Tu N	Ne -	r Sa	a Su	Mo	Tu W		Sa S	u Mo		
ľ		A	IBS A	BS																																								T	1
l	ABS A	BS A	IBS A	BS																																									1
l													FDX													HOL I	ю	HOL	HOL	HOL HO	X HK	эг на	DL	HOL											1
l	ATN AT	IN		A	IN AT	N AB	5 ATN	ATN		ATN											ATN																								1

On the calendar you will be able to view your absences in detail alongside those of your Team.

Please note: Whilst your record will show the different types of leave you have booked, the leave requested by other members of the team will only ever show as ABS regardless of type.

My Time ABSENCE for Employees



November 2016