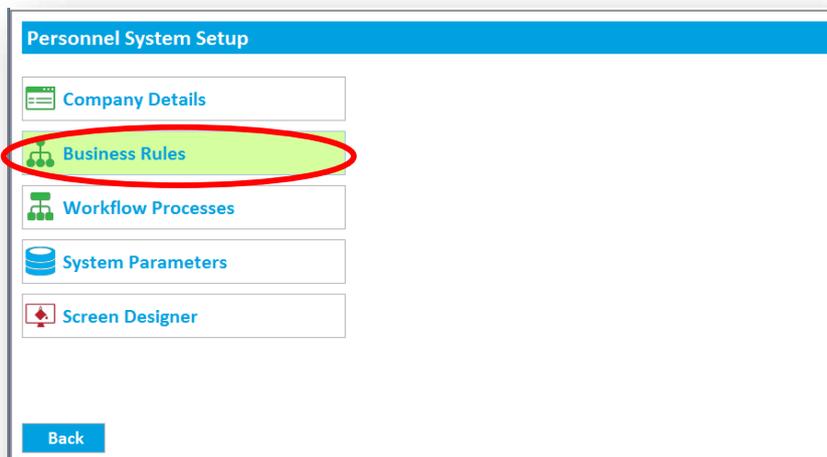
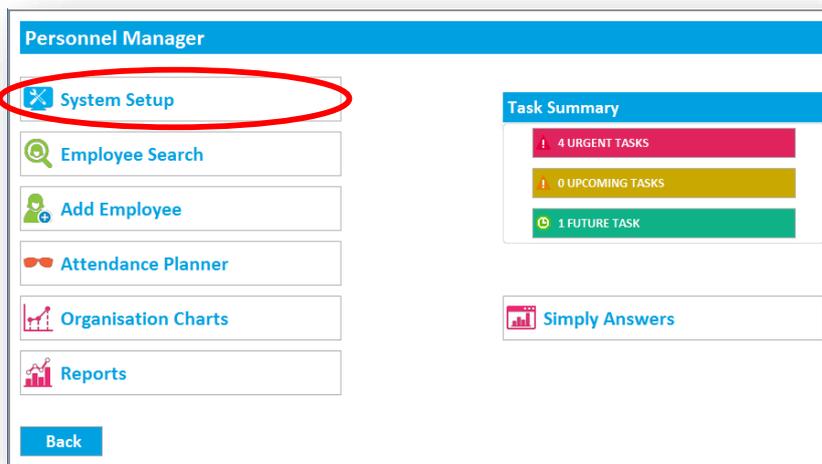


Simply Personnel – Creating a new holiday year

This document is guide for administrators of Simply Personnel, creating a new holiday year and applying this to your employees.

This guide assumes you already have an existing holiday year profile and is assigned to your employees.



HOLIDAY YEARS

This section the user can enter the start and end dates of the new holiday year and assign it to the relevant holiday year profile. This will be used later when activating holiday years to allow holidays to be entered to the relevant year.

- Select *Add*
- Select the relevant profile for the year
- Enter the start and end dates press *OK*

Profile	Holiday Year	Start Date	End Date
Holiday Year	2014	01/01/2014	31/12/2014
Holiday Year	2015	01/01/2015	31/12/2015

Buttons: Add... (circled), Update..., Delete, Close

Holiday Year Details

Profile: Holiday Year
Year: 2016
Start Date: 01/01/2016
End Date: 31/12/2016

Buttons: OK (circled), Cancel, Help

BANK HOLIDAY

In this section the user can detail the bank holiday dates for the year, and also specify if they are additional to employees' annual leave entitlement and therefore would be duration of 1.

Alternatively set to 0 so the system does not deduct a day from annual leave entitlement.

On selecting bank holiday the user will be greeted with three different profiles - select the appropriate profile for the Organisation.

IMPORANT - Bank holiday dates must be updated each year.

Holiday Name	Start Date	End Date	Duration	Hours
New Years Day	01/01/2015	01/01/2015	0.00	0:00
Christmas Day	25/12/2015	25/12/2015	0.00	0:00

- Highlight the profile for amendment
- Select Update
- Once in the relevant profile begin entering the dates
- Select Add and provide the name of the bank holiday
- Enter the start and end date
- If the duration 1 is entered a day will be deducted from employee's entitlement - 0 will not
- Select OK
- Click Yes

Do you wish to update the holidays for the employees that use this profile? All existing bank holidays will be replaced with the ones for this profile.

Yes No



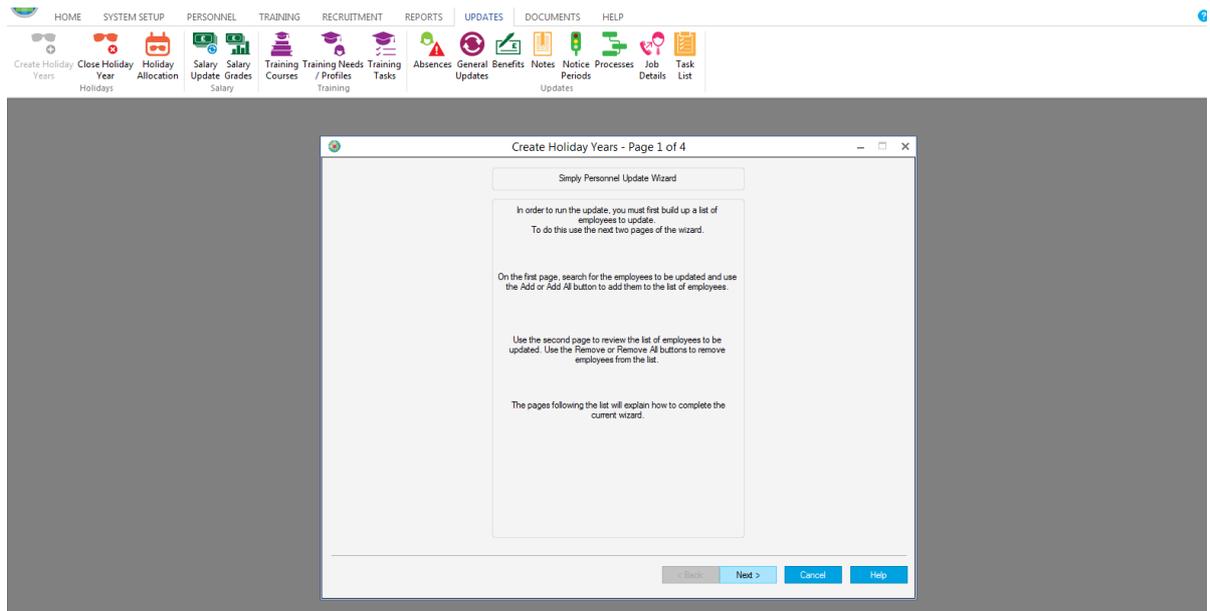
It is necessary to enter the bank holiday dates each year

APPLYING NEW HOLIDAY YEAR TO EMPLOYEES

In this section a user can utilise the updating of multiple employee records at the same time. This section is only accessible from the toolbar.



Each of the global update functions will open a wizard to allow the user to select the employee records to update.



- Select the global update
- Select Next from the first wizard screen
- Highlight the employee records to update

The screenshot shows an employee search interface. On the left, there are input fields for 'Employee ID:', 'Surname:', 'Forename:', 'Payroll ID:', and 'NI Number:', along with an 'Include Leavers' checkbox. Below these are tabs for 'Main', 'Date', 'Work', 'Dept/Loc', 'Course', and 'Training Needs'. The 'Main' tab is selected. On the right, a table titled 'Search Results:' displays a list of employees with columns for ID, Surname, Other Names, Department, and Location. The 'Add All' button at the bottom of the table is circled in red. Below the table are buttons for '< Back', 'Next >', 'Cancel', and 'Help'. The 'Next >' button is also circled in red.

ID	Surname	Other Names	Department	Location
1	Abbott	Albert	Management	London
2	Adams	Matthew	Sales	London
25	Ainsworth	Julie	Sales	London
26	Alcock	Vicky	Sales	London
3	Bathley	Catherine	Management	London
4	Beasley	James	Management	London
29	Brown	James	Production	London
32	Burton	Domonic	Production	Leeds
27	Butler	Adam	Production	London
30	Clark	Simon	Production	London
10	Cockrill	Loyd	Production	London
40	Colins	Sam	Administration	Birmingham
5	Cooke	Jenny	Accounts	London
15	Cooper	Rodger	Production	Leeds
17	Eden	John	Production	Leeds
11	Emmerson	Kieth	Sales	London
18	Empson	Phillip	Production	Leeds
13	Falkner	Sam	Production	London
81	Glover	Jane	Sales	London
19	Graham	Jane	Administration	Leeds

Users can use the different tabs to filter employees by their department/location etc.

Highlight the employee's, select add

Alternatively select Add all; the wizard will add all the employee in the list

The next page will display a confirmation page of the employee records being updated

ID	Surname /	Other Names	Department	Location
1	Abbott	Albert	Management	London
2	Adams	Matthew	Sales	London
25	Ainsworth	Julie	Sales	London
26	Alcock	Vicky	Sales	London
3	Bathley	Catherine	Management	London
4	Beasley	James	Management	London
29	Brown	James	Production	London
32	Burton	Domonic	Production	Leeds
27	Butler	Adam	Production	London
30	Clark	Simon	Production	London
10	Cockrill	Loyd	Production	London
40	Colins	Sam	Administration	Birmingham
5	Cooke	Jenny	Accounts	London
15	Cooper	Rodger	Production	Leeds
17	Eden	John	Production	Leeds
11	Emmerson	Kieth	Sales	London
18	Empson	Phillip	Production	Leeds
13	Falkner	Sam	Production	London
31	Glover	Jane	Sales	London
19	Graham	Jane	Administration	Leeds
12	Hill	Sara	Administration	London
45	Htrfa	Tzajhat 1		
21	Idle	Mike	Production	Glasgow
23	Jackson	Simon	Production	Glasgow
22	Jagger	Roy	Production	Glasgow

Remove Remove All Print Export

< Back Next > Cancel Help

Users can also remove employee records at this stage

- Select Next

The final screen of the Create Holiday Years wizard will allow users to select the year being activated and apply the bank holiday profile set within the business rules.

- To finish the wizard and apply the change select Finish
- An audit report will be opened to allow a view the changes made

Simply Personnel Demo
Global Holiday Year Audit Report
 Report Date: 09/09/2015
 Holiday Profile: Holiday Year
 Holiday Year: 2016
 Bank Holiday Profile: England and Wales
 Holiday Year Start Date: 01/01/2016
 Holiday Year End Date: 31/12/2016
 Using the employee's normal entitlement
 Not updating the entitlement of existing holiday years

Employee ID	Surname	Forename	Entitlement
1	Adams	Adrian	28.000
2	Adams	Adrian	28.000
3	Adams	Adrian	28.000
4	Adams	Adrian	28.000
5	Adams	Adrian	28.000
6	Adams	Adrian	28.000
7	Adams	Adrian	28.000
8	Adams	Adrian	28.000
9	Adams	Adrian	28.000
10	Adams	Adrian	28.000
11	Adams	Adrian	28.000
12	Adams	Adrian	28.000
13	Adams	Adrian	28.000
14	Adams	Adrian	28.000
15	Adams	Adrian	28.000
16	Adams	Adrian	28.000
17	Adams	Adrian	28.000
18	Adams	Adrian	28.000
19	Adams	Adrian	28.000
20	Adams	Adrian	28.000
21	Adams	Adrian	28.000
22	Adams	Adrian	28.000
23	Adams	Adrian	28.000
24	Adams	Adrian	28.000
25	Adams	Adrian	28.000
26	Adams	Adrian	28.000
27	Adams	Adrian	28.000
28	Adams	Adrian	28.000
29	Adams	Adrian	28.000
30	Adams	Adrian	28.000
31	Adams	Adrian	28.000
32	Adams	Adrian	28.000
33	Adams	Adrian	28.000
34	Adams	Adrian	28.000
35	Adams	Adrian	28.000
36	Adams	Adrian	28.000
37	Adams	Adrian	28.000
38	Adams	Adrian	28.000
39	Adams	Adrian	28.000
40	Adams	Adrian	28.000
41	Adams	Adrian	28.000
42	Adams	Adrian	28.000

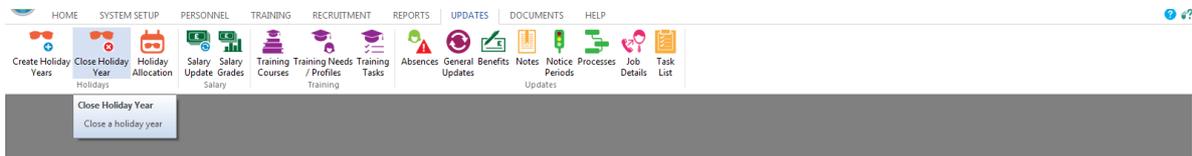
Employees Not Updated

Employee ID	Surname	Forename	Reason
0			

CLOSING THE PREVIUOS HOLIDAY YEAR

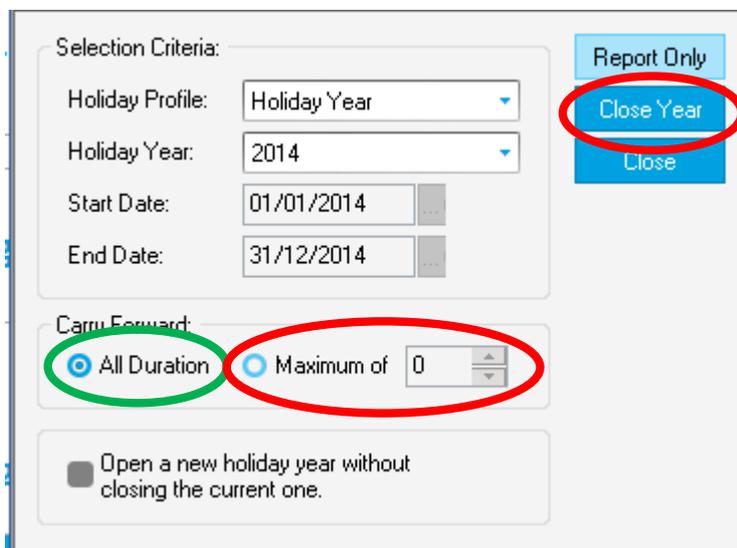
When you wish to close the old holiday year to prevent employee from booking holiday from that year's allocation and if required carry over any untaken holiday entitlement into the holiday year.

This will remove the year from availability in any dropdown list the employee may see in Self Service.



The below screen will appear allowing the user to select the year that will be closed and specify a carry forward.

Selecting 'All Duration' will carry forward all untaken holiday entitlement into the new holiday year
Selecting 'Maximum of' you can limit the number of days of untaken entitlement into the new holiday year. Change the value to zero if no untaken holiday is to be carried into the new year.

A screenshot of the 'Close Holiday Year' configuration screen. The screen is divided into two main sections: 'Selection Criteria' and 'Carry Forward'. In the 'Selection Criteria' section, there are four fields: 'Holiday Profile' (set to 'Holiday Year'), 'Holiday Year' (set to '2014'), 'Start Date' (set to '01/01/2014'), and 'End Date' (set to '31/12/2014'). To the right of these fields are three buttons: 'Report Only', 'Close Year' (circled in red), and 'Close'. In the 'Carry Forward' section, there are two radio button options: 'All Duration' (circled in green and selected) and 'Maximum of' (circled in red) with a value of '0'. At the bottom, there is a checkbox labeled 'Open a new holiday year without closing the current one.' which is currently unchecked.