

# User Manual: Administrators

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**Leavedays**



This manual offers aid in designing the Leavedays application to fulfill the needs of your company. This entails a short manual and a step-by-step explanation for designing the application. For more instructions or other manuals, we refer you to [support.vrijedagen.nl](http://support.vrijedagen.nl)

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## Before installation

Before implementing the Leavedays system, it will be necessary to design the application to your company's needs. Follow this manual when initializing the application before implementation, or when adapting the application later on.



This manual was written in the order of use. We recommend that you keep to this order, so that all data is entered correctly, and does not have to be entered a second time.

## Initial Settings

Go to **'system settings'**, followed by **'options'**.

At **'standard password'**, fill in "welcome". If it is already filled in, leave it like that.

Uncheck the box for "send mail". Save these settings.

### What happens when the aforementioned settings are changed?

This prevents new employees who have just been added to the system from getting an email with log in data for Leavedays right away. It is inconvenient for employees to receive emails during the initialization of the application, as it might bring forth questions. The standard password serves to make it possible to log in with "welcome" at all times. This is necessary because if the 'forgot password' option would be selected, there will not be an email with a new password, as this option has just been turned off. If no default password is chosen, a new password would be automatically generated, but it would not be possible to find out what it is because, again, there will not be an email containing the new password. This would make it impossible to log in again.

## System settings

The remaining system settings will be described before going into the design of the system. The system settings are divided into 'general', 'supplementary' and 'type of leave links'.

### General

#### First day of fiscal year and month of first day of fiscal year

This allows you to select when the leave balance is given to employees. The number represents which day of the month this will be.

#### Month of first day of fiscal year

This allows you to select when the leave balance is given to the employees. The number represents the month. If this should be in January, leave the 1.

#### Standard password

If you add a standard password, this password will be activated as soon as an employee selects 'forgot password'. This password will only be activated for that specific employee.

#### Number of days that password is valid:

This allows you to select the number of days after which employees have to change their password. If it does not need to be changed at all, fill in -1 here.

**Number of days that a request can be withdrawn or modified:**

This allows you to select the number of days within which it is possible for the employees to modify or withdraw a request from the moment it was requested. If the option -1 is selected, it will always be possible for employees to modify or withdraw their requests.

**Number of log in attempts:**

This allows you to select the number of times a wrong password may be entered without the account being blocked. If the option -1 is selected, the wrong password may be entered infinitely. Obviously, choosing to use this option does entail security risks. It is customary to set this number to 5 attempts.

**Language:**

This allows you to select the language for the website and the emails. This language setting can be changed by individual employees to a language that only applies to their website. Employees can do this under 'profile'. This can be found at the top right of the screen, after they have logged in.

**Show balance in:**

This allows you to select the default settings for showing the balance. This will be the standard way the leave balance will be shown in an overview. It is also possible to change the way the balance is shown per type of leave in the "employment". If 'standard' is selected, the type of leave will be shown according to the system settings.

**Send mail**

By unchecking this box, no emails will be sent to notify requests, assessments, and sick reports. It is desirable to uncheck this box during the initialization of the application so that a new email will not be sent every time a new employee, a request, or balance is added to the system. When going live, you can turn this option back on.

*Save these settings before going to the tab 'supplementary'.*

**Supplementary****Show period selection on homepage:**

This option allows not only the leave of that day to be shown on the homepage, but also offers the option of showing the whole week or month ahead. It is possible to show the leave days of the employee, an entire department, or the entire company depending on the settings used when adding the employee (this is employee dependent).

**Show leave of today**

By using this option, the homepage of you and your employees shows which colleagues are on leave that day.

**Show birthdays**

By using this option, employee's birthdays will also be shown on the homepage.

**Show capacity utilization on homepage**

This option allows the current capacity utilization of the department to be shown on the homepage.

**Do not send email after changing own password**

By selecting this option, the system will not send an email after the password is changed. By leaving this unchecked, an email will be sent.

**Automatic calculation of day total time in request**

In case your employees can also request leave by the hour, we would recommend that you leave this function on. This makes sure that, when a day is selected in requesting leave, the total amount of time will be automatically calculated.

**Request overtime is possible**

By selecting this option, employees are allowed to request overtime. This does not necessarily mean that all employees are allowed to do so, as this depends on their employment and the type of leave 'state overwork'.

**Enter overwork percentage**

When this box is checked, it is possible to select at which percentage overtime is exchanged in time off in lieu. The standard option for overtime is 1 hour overtime is 1 hour off in lieu. Filling in 150% means that one hour of overtime is exchanged for 1,5 hours, etc.

**Use overtime regulations**

In case you want to regulate standard percentages at certain times, select this function. The aforementioned function, overtime percentage, will consequently be turned off. Contact the service desk to implement overtime regulations. We would be glad to help you along

**Definition shift from schedule**

This option should be used when leave can be requested per day or per shift. When this box is not checked, the average number of hours in a day (or shift) will be deducted per requested day. When this option is selected, the system will deduct the actual number of hours according to a shift from the schedule, instead of from the employment. You don't need to use this option when your schedules have the same number of hours every day, and the number of hours in the schedule conforms to the norm according to the employment.

**Expiry date leave**

When this option is selected, an expiry date can be entered per type of leave in the employment. It is not necessary to turn this function on when you take on the new legislation on leave. This option is sometimes used when leave from the past year will expire in the next year.

**Moving request to Outlook:**

When this option is selected, an Outlook icon will appear at the requests in the balance adaptations list when the request is approved. When the employee clicks this, an entry is created and can be placed in the Outlook calendar. Attention: the system will put the entry in the currently open Outlook calendar!

**Send email to manager in case of sick report**

When this function is turned on, an email will be sent to the manager when an employee is reported sick or healthy.

### **Show total balance column until end of the month in balance list**

By selecting this option, the balance overview will show an extra column containing the acquired leave until the last day of the previous month. This allows the employee to see the number of days/hours he/she has left until the date shown. This is used when the remaining balance is shown on the employee's paycheck.

### **Show total line in balance list**

It is possible to show the total balance of multiple types of leave in the balance list of an employee. This allows the employee to see how many leave days he/she has of multiple types of leave, in total. For instance, a total balance of normal leave, and ATV days. By selecting this option, different types of leave will be added to one another to present a total amount. Attention: the system will add all the types of leave where 'show balance' is selected in the settings of the type of leave in question.

### **Show hierarchic employee list in calendar overview**

By using this function, a manager has the possibility to not only see his employees, but also other managers' employees in the calendar overview.

### **Allow an employee to see the attendance list**

This option only applies to customers who work with time registration. In case this option is selected, employees can see whether their colleagues are present or not.

### **Hide password on mail after change own password**

Using this function entails that after changing the password, an email will be sent with a confirmation of the change. This email will not show the new password.

## **Type of leave links**

### **Type of leave exception rules for special day**

This is meant for the Belgian legislation. In case a holiday occurs in the weekend, a leave day is given back in return. The type of leave for these extra days can be selected here, so that the system can automatically add the days to the balance according to the way the holidays have been entered into the system in the special days section. These special days can be entered at '**master data**', followed by '**special days**'.

By selecting '**on Saturday**' or '**on Sunday**' you can select for which day(s) of the weekend this exception counts.

In case you need to use this option, a region has to be created in 'master data', followed by 'regions', to which the foreign holidays need to be added. When a new employee is added to the system, this region can then be selected, so that these holiday rules will be implemented for this employee.

### **Standard type for sick reports**

In case you are using the module 'sick reports', the type of leave 'sick' can be linked to this function. This type of leave needs to be created in the types of leave section, first, if

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this has not been done yet. Also, it has to be added to all the employments. This way, sick reports will use in the type of leave 'sick', when sick reports are filed.

## Master data

Under master data, you will find several options for implementation of the system. This option is only visible for employees with the role of administrator. From here, the basic data for the whole system is regulated.

## Types of leave

### What is a type of leave?

*Types of leave are the building blocks of employments.* Employees can request these types of leave, and every different type of leave has a different balance. This makes it possible to distinguish a vacation from a doctor's visit. Furthermore, it is possible to create types of leave which allow registration and implementation of maximums for certain activities to occur without subtracting from the balance, such as company courses.

### **Building blocks**

Types of leave are linked to employments. Different combinations of types of leave can be made for different employments, so that not every employee has access to every type of leave. Each employee can only use the types of leave added to their employment.

### **Adding types of leave**

It is possible to add new types of leave as well as adapt existing types of leave. In case there is a type of leave you do not wish to register, it is possible to delete it by clicking the little trash can behind the type of leave. Adaptations can be made by clicking the little pencil.

### **Create New Type of leave**

Go to **'master data'** → **'types of leave'** and click **"insert"** to create a new type of leave. A new window will appear.

### **Type of leave**

Fill in the name of the type of leave you want to register here.

### **Priority**

This refers to the order in which the type of leave will be shown in the list of types of leave that can be selected by employees.

### **Colour**

Leave can be shown with a certain colour in the calendar overview.

The colour which will be shown in the calendar overview as soon as this type of leave has been approved is shown at **'colour'**.

The colour which will be shown to the manager in the calendar overview when this type of leave has yet to be approved is shown at **'colour in request'**



**Colour entry** shows the colour which will be shown in the calendar overview when a request for overtime has been approved. When any colour is selected here, you as well as your employees can see when someone has worked late. If you do not wish this to be shown in the calendar overview, leave this white.

**Colour request entry** is the colour shown when an employee has requested overtime and the extra time has been booked to balance. This also has to be selected in time off in lieu.

**Include max. number**

The number of days of this type of leave that will be transferred to the next year can be entered here. If everything may be transferred, fill in -1 here. This is the case with normal leave taking into account the new legislation on leave. Regarding other types of leave, you can decide how much of the balance can be transferred to the coming year. Fill in a 0 if there may be no transfer of leave balance to the coming year. The leave balance will then disappear with the end of the year.

**Is overtime**

If overtime is allowed to be requested, this function allows you to select whether overtime can be transferred to the balance of this type of leave. This type of leave can then be selected in the 'state overwork' option.

**Show balance**

Here you can select whether this type of leave will show credit - meaning the number of hours that still can be requested - in the balance summary. This credit will be shown in the third column of the balance summary.

- It is also advisable to turn this functionality on when it comes to types of leave with credit, if you want to have an overview of the total credit. This means that normal leave, days in lieu, and reduced working hours are all separate stores of leave. It is possible to show a total of these balances in the overview when this is functionality is turned on. You can turn it on in the system settings.



**balance**

year 1/1/2015 - 12/31/2015

---

name **with standard roster Employee**

employment **Normal employment with Dutch Legislation (100%)**

type of leave	plus	minus	balance	balance at 28-2	
<input type="checkbox"/> Normal leave + DL	59d 07:00	2d 06:15	57d 00:45	57d 00:45	*
<input type="checkbox"/> Special leave	-	-	-	-	*
<input type="checkbox"/> Reduction in working hours	12d	-	12d	12d	*
<input type="checkbox"/> Doctor's visit etc.	-	-	-	-	*
<input type="checkbox"/> Time off in lieu	-	-	-	-	*
<input type="checkbox"/> Sick reports	-	-	-	-	*
			<b>69d 00:45</b>	<b>69d 00:45</b>	

**Show entitlement**

you can select whether or not to show the balance in the balance summary. The balance is shown in the first column of the balance summary. If you tick this box, either a positive or a negative number will be shown here, to represent the balance of this type of leave. In case you check the 'show credit' box, this type of leave will also become available for the leave balance report, because it has then turned into a type of leave with entitlement.

**Do not show in calendar**

By using this option, this type of leave will not be shown in the calendar overview for other employees than the employee in question and the manager of this employee. This can be a desirable option for types of leave such as doctor's visits.

**Negative balance is not allowed**

This option can be used in case you do not want an employee to request more leave than his/her balance allows. It prevents employees from requesting more leave than they have.

*This option does not have to be turned on when the type of leave in question does not have a balance!*

If negative balance is allowed, the amount below 0 will be deducted from the new leave balance for the next year.

### **Request per**

This allows you to choose the way leave can be requested. There are four possible options:

**Minute:** This means leave can be requested by the hour.

**Shift:** The system will look at the schedule to determine the shift.

**Day:** Only full days can be requested.

**2, 4, 6, or 8 hours:** Leave can be requested in periods of 2 hours. This is only applicable to regular schedules.

### **Reason obligatory**

When this box is ticked, the employee has to give a reason for asking leave in the request. Ordinarily, this is only used for special leave. When this box is left unchecked, the employees will have the opportunity to leave a reason for asking leave, yet this is not obligatory.

### **Calculation method**

This offers the options 'standard', 'legislation 2012', or 'transport statutory leave 5 year valid'. All types of leave should have the option standard, with the exception of normal leave, if you decide to use the new legislation. Use the 2012 legislation if you wish to make use of the expiry rules of statutory leave (expires first of July of the next year) as well as exceeding statutory leave (expires after 5 years). Use transport statutory leave 5 year valid when you only wish to use the expiry rules for the leave exceeding the statutory minimum. Go to <http://support.vrijedagen.nl> for more information about the 2012 legislation on leave and the calculation method that is employed.

## **New legislation on leave**

A new legislation about holidays has been implemented from January 2012 onwards. This means that the leave balance of your employees henceforth shall consist of a statutory and an exceeding statutory part. With a full-time contract, the statutory part is twenty days and expires half a year after the calendar year has ended. In other words, these days have to be used before the first of July of the next year. The remainder of the days are the exceeding statutory part and expire after 5 years.

The Leavedays system has implemented this legislation as well. It is an option that can be used for the types of leave discussed earlier. Companies are required to follow these rules. It is, however, possible for the employer and employee to come to a different agreement, but only when it positively affects the employee.

### **Taking leave in Leavedays**


When requesting leave in Leavedays, it is not possible to choose between statutory and exceeding statutory days. The statutory days will expire first, and thus they will be used first. When these have run out, the system will check the remainder of the days. Credit from previous years will expire before statutory balance. The system will, therefore, use



this credit first, after using the statutory days. Then, the system will use the exceeding statutory days.

When using the option of the new legislation, the 'credit' will be shown next to 'normal leave'. The balance and expiry date of the leave days is shown in this overview.

## Annual leave summary

The following icon appears next to normal leave:  .

When this icon is selected, an overview appears containing the balance and the expiry date according to the new legislation.

The remainder of last year's balance can be seen at [transport previous year](#). Remaining balance from before 2012 expires after 5 years, and thus has the comment '[valid for another 5 years](#)' underneath.

Balance can be further divided into statutory and exceeding statutory balance.

This [statutory balance](#) has to be used within 1,5 years after receiving the days. This means that the statutory days of 2014 have to be used before the first of July 2015. If they are not used, they will expire. This can be seen at: '[expires on: 01-07](#)'.

The [exceeding statutory balance](#) expires after 5 years. For example: if Jan does not take any leave in 2014, the exceeding statutory balance of 2014 of 20:00 hours will expire after 5 years. This can be seen in the overview at [valid for 5 years](#). In the case of a **manual addition**, the balance will be shown at: manual added. The same goes for leave which is paid out, this will be shown at '**sold**'.

### annual leave summary - Employee With new legislation

	2014	2015
transport previous year	-	-
statutory	104:20	160:00
exceeding statutory minimum	20:52	32:00
manual added	-	-
<i>subtotal added</i>	<i>125:12</i>	<i>192:00</i>
<b>total added</b>	<b>125:12</b>	<b>192:00</b>
included	08:00	-
expired	-	-
sold	-	-
<b>total deducted</b>	<b>08:00</b>	-
transport next year	117:12	95:40
expires on: 01-07	-	* 96:20
expires after the (fiscal) year	-	-
valid for another 2 years	-	-
valid for another 3 years	-	-
valid for another 4 years	-	-
valid for another 5 years	-	20:52

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\* = expiry date deviates from standard expiry date

## Employments

### What is an employment?

The employment contains information about the number of days each employee is entitled to per type of leave, in the case of a full-time workweek.

Per employee, it can be decided how much he/she works compared to a full-time week by means of percentages. Through this process, the number of leave days is calculated for part-time employees. This allows for more structure in the system, as compared to using many different employments.

It is possible to create multiple employments, for instance to create different types of weeks. It is possible that some of your employees have a 38-hour contract, and others a 40-hour contract. However, only one employment can be selected for one employee. It is, of course, possible for an employee to switch employments throughout the year. This will require a change of contract.

### **Senior days**

An employment can contain multiple senior days. The system will then decide, using birth dates, who is eligible for these days. Senior days can be attached to a specific type of leave. It is also possible to select whether these days are given by ratio or the number of hours an employee works.

### **Seniority days**

It is also possible to add seniority days to the employment. These are leave days pertaining to the number of years an employee has been in service to the company. This is automatically attached to the date the employee started working for the company. The method of entering these days into the system is the same as the method used to enter senior days.

### **Create Employment**

Go to '**master data**' → '**employments**' and select "**insert**" to create a new employment. A new window will appear.

- **Name:** Enter a name for the new employment here.
- **Days per week:** Fill in the number of **days** that should be added for this type of leave. When this should be none, fill in 0. Always fill this in for a full-time week.
- **Hours per week:** Fill in the total number of hours that are worked per week. Always fill this in for a **full-time week**.

*The 'Days per week' & 'Hours per week' option together determine the number of hours in a day, which determines the entitlement of leave in the employment at the option 'number' (see below).*

- **Combination age and years of service:** Select this option when employees get extra leave days when they have been in service for x years **and** have reached a certain age. Do not use this option if either one of these is enough.



- **Reference date senior days:** This determines whether the age of the employee is counted at the beginning of the year, from the birth date, or another variation (go to <http://support.leavedays.com> for more information).
- **Reference date seniority:** This determines whether the number of years of service is counted at the beginning of the year, proportional, or another variation (go to <http://support.leavedays.com> for more information).
- **Custom (months after start):** In case the option 'custom' has been selected at one of the reference dates, this option determines which of the 12 months will be referenced here.

After adding the employment, it is time to set it up with all its types of leave, and any senior- or seniority days you wish to add. Select the 'detail' icon next to the new employment to do this.

Types of leave are the building blocks of employments. Therefore, they can be used differently in each employment.

Select the option 'add type of leave'. A screen will appear with the following options.

- **Name:** Select the name of the type of leave in question.
- **Number:** Select the number of **days** entitled for this type of leave yearly. In case no leave days should be entitled for this type of leave, enter 0 here. The number of hours in a day used depends on what was entered at 'days per week' and 'hours per week' or 'hours from schedule'.
- **Show in:** The unit in which the type of leave is shown can be selected here (hours, days, etc.)
- **Request per:** This allows you to select in which unit the leave is requested when a request is filed (hours, days, etc.). Select 'standard' when you wish to use the standard setting for this type of leave.
- **Hours from schedule:** In case you wish to use the number of days as filled in at 'number' to calculate the entitlement of leave days, instead of taking it from the employment, turn this option on.

In case this option is not on, the total amount of time in a day is calculated in the employment through the option 'days per week' and 'hours per week'. Go to 'master data' → 'employments' and select the little pencil icon.

In case you do turn this option on, the total amount of time in a day is calculated from the schedule of the employee to whom this employment is linked. Go to 'master data' → 'schedules' and select the pencil icon to set the hours in one day in the schedule.

- **Round up:** This option is used to round the entitlement of this type of leave up to 15 minutes, half hours, or whole hours. The round off limit determines from which minute the number can be rounded up.
- **Waiting days:** Waiting days can only be used when the module 'sick reports' is activated. In case the contract of an employee contains waiting days, you can add the number here. Only use waiting days for the type of leave from which you wish to subtract them.
- **Expires on:** This option is only visible when you have turned on the option 'expiry date leave' at 'system settings' → 'options' → 'supplementary'. Use this option

when leave for this type of leave expires at a certain date (day & month) the year after is has been transferred according to the transfer rules of this type of leave. To let this leave expire, go to 'administration' → 'year processing' and select 'add expired transport adaptations'.

**Attention:** In case you do not want this leave to expire, select 31(day) and 12(month) here.

- **Starting month:** Use this option in case your fiscal year differs from the usual situation. Select the starting date of every type of leave here. When the type of leave starts at a different date than expected, fill in the date here. If it should be used for every type of leave, select 'for all types of leave' here.

Repeat these steps until all the types of leave pertaining to this employment have been added.

### **Senior days and seniority days**

The rules regarding senior days and seniority days can be added here, in case your company uses these. The system will then look at the birth dates of the employees, and will automatically apply them where senior days are needed. This also goes for seniority days, where the system looks at the date the employee started working for the company.

### **When do you have to have more than one employment?**

If one of these three reasons applies, you should create a new employment for an employee:

1. As compared to a full-time, existing employment, an employee gets more, or less, leave days.
2. As compared to an existing employment, the employee gets more, or less, types of leave.
3. As compared to a full-time, existing employment, the employee gets more, or less, senior- or seniority days.

Multiple employments should be made when multiple contracts apply. If this is the case, multiple different agreements have to be recognized. It is possible to insert these agreements in every employment, and attach them to the employees in question.

It is also necessary to create different employments when some employees are allowed to register overtime where others cannot. Furthermore, it may be necessary when different percentages of registering overtime apply.

For example, if you were to put employees who are not allowed to register overtime on a employment which does allow it, the employees would be able to select the option in their navigation screen. To make sure that these employees do not have the option to register overtime, it is possible to make a copy of the employment in question and take out the 'time off in lieu' option in the copied version.

There are more reasons like these for creating different employments. Should you have any doubt about whether you did it right, or when changes arise, you can always contact our support desk.



## Schedules

The schedule serves to indicate when employees work and how many hours this would be in the case of a request for leave. This prevents employees from requesting more hours than there are in their actual schedule.

A standard schedule is created for employees who have the same schedule, such as fulltime employees. Multiple people can be linked to the same schedule.

It is advisable to create a new schedule for every part-time employee in the system, unless there are multiple part-time employees who have the same schedule.

It is also advisable to give the schedule a recognizable and logical name. For instance, if the schedule in question contains a day off on Friday, the schedule's name could be 'Friday's off' or '8 8 8 8 0', in case you also want to put down the number. A schedule can be used by multiple employees; we therefore strongly recommend creating a new schedule when a change occurs in the schedule, instead of editing an existing one. Changes affect the schedules of all the employees linked to it, also with retroactive effect.

### Insert schedule

Go to '**master data**' → '**schedules**' and select '**insert**'. A screen will appear in which you can fill in a name, for instance of the employee, the department or type of contract and hours in a day. See below:

### Hours in a day

Fill in the number of hours that constitute a day here. For instance, an employee works 3 days of 4 hours, and 1 day of 8 hours. What constitutes a day, in that situation? We advise you to fill in either 4 or 8, instead of an average, or anything else. Then, when leave is asked on a day of 8 hours, and 8 is set as the number of hours that constitute a day, then 1 day off is calculated. In another case, when leave is requested for a day of 4 hours, half a day off is calculated. You can fill in what is most clear to you and your employees.

This will not be used when you choose to show the balance in hours. We would always advise you to choose the option to show the balance in hours; this option can be found in system settings.

### Filling in schedule times

After creating the schedule, select the 'detail' icon next to the schedule in question. You will then see the schedule, and can start filling in the times that will be used by your employees. If this schedule repeats itself every week, you only have to fill in one schedule. If this schedule repeats every two weeks, you have to fill in two schedules, etc. You can edit a day by selecting the little pencil on the right.

From top to bottom, enter the starting time, the start of the break, then end of the break, and the end time of the day. On the very last line, fill in how many hours have been worked that day. Lastly, pick one of the applicable options: the day will be copied to all the week days or weekend days or will only be used for the current day. Click save.





Repeat this process for all the days of the week, and select how many times this schedule will repeat.

It is possible to calculate small breaks into the schedule. To do this, select the little pencil next to the week, and check the box 'use small break'. Save this, and a break period will appear above the schedule. You can edit the break by selecting the little pencil, and fill in a time in the morning or the afternoon. Afterwards, select 'save'.

## Special days

In this screen, you can see all the common holidays in the Netherlands so you can select the ones you would like to put in the schedule. These will be the holidays everyone has off, without costing them any leave days.

Special days are holidays that reoccur, such as national holidays, which can be put in the schedule for the whole company. Those set days are days when all employees are off work and they do not have to ask for leave.

When your company celebrates the (Dutch) national holidays, you can select the button 'add national holidays (NL)', to automatically add these to the schedule. In case your company does not celebrate all of the national holidays, you can manually adapt or delete them.

The box 'is day off' means that this day will be a day off for all employees. Employees then cannot request leave for this day. When this box is not checked, the day will remain a special day, but not all employees get leave automatically.

You can manually add other (extra) days in case your company uses different days than the ones that are added automatically by selecting '**insert**'.

**Attention: This process has to be done every year to make sure your employees get those holidays off.**

## Add employees

As soon as all the master data has been entered into the system correctly, it is time to add the employees and link them to their schedules and employments. This can be done by going to the '**administration**' → '**employees**'.

*'Employees can be imported into to the system, contact the Leavedays support desk.'*

[http://support.leavedays.com/Knowledge\\_Base/importing-employees/](http://support.leavedays.com/Knowledge_Base/importing-employees/)

First, enter in the 'highest' manager, preferably. It is necessary to first add managers to the system, so that the employee which are added can be linked to their manager.

Select **'add employee'** and fill in all the necessary information. Attention: fill all the empty spaces, even if you do not know the information, such as date of birth, email address, and starting date at the company. This can be edited later on, in case the information is incorrect.

**Attention:**

At the space for 'percentage employment', fill in the percentage of employment. If this is full-time, fill in 100%, otherwise, fill in the corresponding percentage.

**How can I calculate the part-time percentage of your employee?**

Take the number of work hours the employee works, and divide this number by the number of hours in a full-time week. Then multiply this number by 100.

Example: A full-time week at your company is 40 hours. Corinne works 34 hours. The calculation is as follows:  $(34/40) * 100 = 85\%$

This percentage will then be filled in at **percentage employment**.

When adding an employee, four options to select a **role** arise. It is advisable to add the managers first, so that you can link the employees to their manager straight away when adding the employee to the system.

**Leavedays uses the following four functions:**

**Employee:** Everyone is an employee in the system. He/she can request leave and look at his/her leave balance. When an employee only has to assess requests, but does not add any requests of his/her own, he/she is not an employee.

**Manager:** An employee receives the function of manager when he/she has to assess the requests of other employees.

**Administration:** The administrator runs all the data in the system. The administrator can add employees, view employee data, edit and delete data, edit the master data, request leave for someone else, make collective leave requests, make administrative adaptations to balance, process the year and create a new year, import data and make and view reports.

**System management:** The system administrator controls the system settings.

**Attention! Be careful with doling out the role of *administrator* and *system manager*.** This function should not be given to other employees. If other employees can also edit data in the system, it is hard to retrace the steps and see who has changed what.



## Collective leave days

Should your company use collective leave days, such as having the day after Ascension Day off, there is a different way of putting these in the system, besides making it a special day.

Go to **'leave'** → **'collective request'**. A selection can be made between a collective leave day for everyone and a collective leave day for a certain department of the company. Select the type of leave from which the balance for this leave day should be deducted. Select the leave day in the calendar. Enter the reason for the leave day.

The times that are shown are the times of a standard work day; these consist of the range of all schedule times. Fill in the first starting time of the schedules and the last ending time of the schedules. Finally, save the request.

This request does not have to be assessed and has been processed for everyone it applies to. To check the details of the request, go to **'administration'** → **'collective requests'**. Here, you can see all the collective requests. When you click the requests, you can see who it applies to. The system also shows you how many requests have been skipped. This is shown because of the employees who had already requested leave on that day.

When new employees are added, collective days are added to their balance, if they are scheduled to work on that day.

## Contractual changes

**A contractual change occurs, an employee works less hours, gets a different schedule or employment, or stops working for the company.**

These situations bring forth changes which have to be entered into the system. Very often, this influences the leave balance.

Certain changes need to be entered into the system when a contractual change occurs.

### 1. Schedule

When the **number of hours** in the employee's contract is changed, the schedule has to be changed. It is important to note that a new schedule should be created in this case; it is not wise to edit the old one. When the old schedule is edited, while the contract has not been changed yet, the schedule will be implemented straight away. This is because the schedule is still linked to the employee, and could also be linked to other employees. This also affects the effectiveness of the change of contract scan.

For your convenience, the current schedule can be copied by using the copy function. Go to **'master data'** → **'schedules'**. To copy, use the first icon, next to the little pencil.





Give the schedule a new name, fill in the schedule, and save. Then go to **'administration' → 'employees'**. Select the employee whose schedule has to be changed. Always create a new contract rule (see point 3, below).

## **2. Edit employment**

In some cases, the employment has to be edited. This is only the case when a different employment is created for a specific employee, or when it concerns contractual changes. Only in those cases should the employment be edited, otherwise the current employment should remain. The system calculates the number of leave days using the percentage of the employee and multiplies this by the number of days in the employment.

## **3. Add a contract rule**

A change in the number of hours worked by the employee causes a change of percentage of an employee. This, in turn, affects the balance an employee receives. After creating a new schedule, it is thus necessary to create a new contract rule, which contains the changes. The contract rule can be added via **'administration' → 'employees'**. Search for the employee in question, and select the little pencil next to the employee's name in order to enter the changes. You will then see the following screen:



employment manager user sell leave calendar logbook

employed 1/1/2015

not employed

employment Standard

percentage employment 100%

schedule 88888

new end of employment

takes effect on employment percentage schedule reason

takes effect on	employment	percentage	schedule	reason
1/1/2015	Standard	100.00	88888	Initial contract change

save back

At the bottom, you will see the current contract rule.

When editing a contract, you should **NEVER** edit the original contract rule.

If you were to do this, the change will be implemented from the beginning of the year. The system will recalculate, and use this change from the first of January, while this is

obviously not right. The employee gets the previous percentage until a new contract rule is added, and the new percentage will count from that date.

takes effect on 1/1/2017

employment Standard 50% incap. ▼

schedule 44444 ▼

percentage 50

reason 50% incapacity for work

save cancel

Using 'new' you can add a new contract rule. You can enter the date the change should be implemented here, which can be at that moment, in the future, or in the past.

At **employment**, you should select whether the current employment remains or if a different one will be used. Then, you will be able to select the current schedule or a new schedule.

At **percentage**, you can enter the percentage the employee will work from the chosen date onwards. The percentage applies to the employment. This percentage of the full



employment will be entitled. For instance, when someone works 20 hours a week in a full-time employment of 40 hours, 50% should be noted here, seeing as  $20/40 * 100=50$ .

If needed, a **reason** for the change can be added as well. The employee will not get to see this.

After saving this contract rule, the changes will be implemented in the calculation of the balance directly.

#### 4. Contract analysis

The Leavedays system can do a scan of the requests in the system after a contract has been edited. It could be possible that there are still requests in the system which were already requested and approved before the change took place.

Conflicting information can arise between the new schedule and the request. This conflict can be solved or deleted by the administrator.

By clicking the little magnifying glass, a new window will open, showing the conflicts screen, as shown below:

**employee change**

[restore password](#) | [make inactive](#) | [delete](#) | [employee balance summary](#) | [request recycle bin](#)

employee

first name:

surname prefix:

surname:

date of birth:

external number:

function:

department:

manager:

authorization flows:

region:

only use the region days

show in calendar:

show balance in:

---

employment | manager | user | sell leave | calendar | logbook

employed	1/1/2015
not employed	
employment	Standard
percentage employment	100%
schedule	88888

new | end of employment

takes effect on					
	employment	percentage	schedule	reason	
	1/1/2015	Standard	100.00	88888	Initial contract change

save | back



## contract conflicts



Employee With new legislation

period: from 5/1/2014 to 1/1/2015



In this screen you can investigate whether conflicts have been created as a result of changes in the contract.

look for conflicts once more


total: 4 | number that must be adapted: 3 | number that must be removed: 1 |


must be adapted		category : request	  
edit request	Normaal verlof:11/21/2014 (8:30 AM - 5:00 PM)		
action taken	not yet performed		
message			
genomen actie door:	genomen actie op:		


  

must be adapted		category : request	  
edit request	Normaal verlof:11/27/2014 (8:30 AM - 5:00 PM)		
action taken	not yet performed		
message			
genomen actie door:	genomen actie op:		

This screen shows all the conflicting information the system has found; all requests that contain differences after the contractual change are shown in their own section. From the example above can be seen that there are two requests that contain conflicting information when compared to the new contract rule. At each section, a few options can be found and selected in the right hand corner of the section.

 When the little *lightning bolt* is selected, the suggested change will be implemented. This should be clicked when the suggested change, which can be viewed when the magnifying glass is selected, matches the changes implemented in the contract of the employee.

 When the *cancel* button is selected, the conflict will be ignored. This is not final! You can view the same conflict again by clicking the 'start looking for conflicts' button is selected.

 The *magnifying glass* is found on the right. With this option, you can zoom in on the request itself. The following screen will be shown, containing a detailed account of the suggested change of this request, which will be compatible with the edited contract.

### conflicts in the request

Employee With new legislation

Normaal verlof : 11/21/2014 (8:30 AM - 5:00 PM)



#### The 'hidden' analyzer

The analysis is partly automatic. This will become evident when a new employee is added. A new screen appears, showing the collective requests which apply to the new employee. It is then possible to select which collective requests will be processed for the new employee.

#### What does the analyzer check?

The analysis checks all requests which do not match the contract rule. When a schedule change has arisen because of a contractual change, causing a higher number of hours in a day, the system will not signal a conflict; it is, of course, also possible to request half days. However, the system then does not know whether the request is for half a day, or a full day. A new request can be used to take up the remaining hours of the day, or the current request can be edited to comprise the full day.

When a request has to be edited, undertake the following steps::

- Go to **'administration'**, followed by **'employee balance summary'**.
- Select the employee whose request has to be edited.
- Select the type of leave of which you want to edit the request.
- Select the request you want to edit. You now have the opportunity to change the request. Select this option, edit the request, and save the changes. The request has been edited.

## Employee leaves the company





**Situation 1**

An employee leaves the company

The balance has to be formatted in order to know the leave balance.

Go to **'administration' → 'employees'**.  
Select the employee leaving the company.

First, you will see the following screen:

takes effect on	employment	percentage	schedule	reason
1/1/2015	Standard	100.00	88888	Initial contract change

Select end of employment and fill in the date of the end of the contract. If needed, a reason can be entered as well.

Go to **'employee balance summary'** in the top right corner of the screen. At **'balance'** you will see the remaining balance of the employee, be it positive or negative.

A choice is presented in what happens to the credit: **it gets paid to the employee or the employee can use it up on leave**. When this balance is requested, the manager as well as the employee can make this request.

**When the remaining balance has to be paid, the following steps have to be followed:**

Go back to the **'employee balance summary'** and select the type of leave of which you want to pay your employee's balance. Select **'new adaptation'**.



## leave

[new adaptation](#) [new collective adaptation](#)

### addition

- [new addition adaptation](#)

### taken

- [new deduction adaptation](#)

### pay out

- [new payment adaptation](#)


### transport

- [new minus transport adaptation last year](#)

- [new added transport adaptation last year](#)

Select 'new payment adaptation'. You will be directed to the following screen:

## adaptation

name	Kim the Manager
kind of adaptation	payment
max sellable	192:00
number of hours	<input type="text" value="0d 00:00"/>
submitted	<input type="text" value="4/15/2016"/> 
reason	<input type="text"/>

**Number of hours:** Fill in the number of hours you want to pay your employee. This can never be more than the number at 'max sellable'.

This way, the balance will show that this leave was paid. Enter a reason and select save. In case there are multiple types of leave with remaining balance, repeat this process for any other types of leave.



Now that the balance has been handled, you have to end the employee's employment. The balance will then be 0.

**Do not forget to deactivate the employee's account after he/she has left the company. This prevents the former employee from logging on to the system, and makes sure that a license opens up. The data of the employee will be maintained in the system when their status is 'inactive'.**

## Situation 2

**An employee has left the company, the account has been deactivated, but the employee returns to the company after a year.**

*Step 1:* Reactivate the employee's account, by selecting 'activate' in the edit employee screen of the employee in question (which can be found at 'administration' → 'employees' and selecting the pencil icon next to the employee's name). Then select save.

*Step 2:* Choose one of the following options: 'extend contract' or 'rehire employee'.

The screenshot shows a web interface for managing employee contracts. At the top, there are tabs for 'employment', 'manager', 'user', 'sell leave', 'calendar', and 'logbook'. The 'employment' tab is active, displaying a form with the following fields:

- employed: 1/1/2015
- not employed:
- employment: Standard
- percentage employment: 100%
- schedule: 88888

Below the form, there are two buttons: 'new', 'extend contract', and 'rehire employee'. A red arrow points to the 'rehire employee' button. Below these buttons is a table with a green header row:

takes effect on employment percentage schedule reason					
⌵	1/1/2015	Standard	100.00	88888	Initial contract change

At the bottom of the interface, there are 'save' and 'back' buttons.

Select **extend contract** when the employee has not been out of service in the meantime.

Select **rehire employee** when the employee was out of service in the meantime, and thus should not be entitled to leave accumulation during that period of time.

## Balance



Every employee can see his or her balance. That way, there can be no confusion about requests; everything is processed in the system. An explanation of the balance overview can be found below. The balance of an employee can be viewed at **'administration'** followed by **'employee balance summary'**. Then select the employee in question.

**Year:** This shows the selected year.

**Name:** This shows the name of the employee whose balance is shown.

**Employment:** This shows the employment linked to the employee and the percentage the employee works.

### balance

year	1/1/2015 - 12/31/2015
name	with standard roster Employee
employment	Normal employment with Dutch Legislation (100%)

type of leave	plus	minus	balance	balance at 28-2	
<input type="checkbox"/> Normal leave + DL	59d 07:00	2d 06:15	57d 00:45	57d 00:45	
<input type="checkbox"/> Special leave	-	-	-	-	
<input type="checkbox"/> Reduction in working hours	12d	-	12d	12d	
<input type="checkbox"/> Doctor's visit etc.	-	-	-	-	
<input type="checkbox"/> Time off in lieu	-	-	-	-	
<input type="checkbox"/> Sick reports	-	-	-	-	
			69d 00:45	69d 00:45	

### Recalculate balance

Using this option, the balance will be recalculated using the data that has been entered in the employee overview, the employment, and the percentage the employee works.

### When to use this option?

This option may be used when a change has occurred that affects the balance of a number of employees, or when you have changed the settings regarding leave. This always involves a change of **employment** (adding or deleting balance or types of leave) or a **contractual change**. See the section on contractual changes to see what constitutes a contractual change.

***The changes in balance or types of leave will only be visible in the balance summary after the balance has been recalculated.***



### **Process**

By using this option, all balance will be processed. This can only be done when the fiscal year is over. It is therefore impossible to process halfway through the year, and thus nothing will happen when you try to use this option at that time.

### **When to use the process button?**

The balance can be processed when the fiscal year is over. We recommend processing all employees at once at the end of the year, to make sure no one is forgotten. It can be a big hassle to do all of this manually, especially within a big company. See **year processing** for more details on this process.

### **The option of processing an individual employee is useful in the following situation:**


The year has been processed for all employees but you find out that you have forgotten to process something, file a request, or clear a balance. In that case, you can reopen the balance of the employee individually by selecting the year in question at the top, and selecting 'reopen'. The system will open the year for the employee in question, and you can implement the necessary changes. After the changes have been made, the year can be closed again by clicking 'process'.

### **Delete year**

Using this option, the year can be deleted. All data within this file will then be deleted. After deleting the year, the only way to restore it is by restoring the back-up from the database. This can only be done through the service desk.

 By clicking the little gear wheel, the balance will be processed.

The year will be processed when the fiscal year has to be closed. Normally, the fiscal year is processed for all employees at once. When this option is used at another time, the balance will be processed and closed for this employee, and then he/she will not be able to request leave anymore. After selecting 'reopen', the employee will be able to request leave again.

 This represents the acquired balance.

If the 2012 legislation on leave is used in your system (which you can select at 'master data' → 'types of leave' under 'calculation method'), you can see the acquired balance here.

Details about the balance can be found when the type of leave in question is selected.

### **Types of adaptations**

Four types of adaptations are available:



[new mutation](#) [new collective mutation](#)

type	minus	plus	submitted	reason	
administrative mutation	2d 06:15	-	3/9/2015	commutation holiday leave	
carry over balance	-	35d 07:00	1/1/2015	Transfer previous year	
leave entitlement	-	24d	1/1/2015	starting balance on basis of employment	

**- Administrative adaptation**

This involves manual addition to or subtraction from the balance. The reason will be shown in the last column.

**- Leave entitlement**

This is the balance given at the beginning of the year from the employment, or when a contractual change has occurred.

**- Carry over balance**

This involves transfer of positive or negative left-over balance of the previous year. -

**Expired transport adaptation:**

This can only occur when the 2012 legislation on leave is selected as the calculation method. A deduction adaptation will be made because the leave has expired.

**Perform adaptation on balance/transfer left-over balance of the previous year.**

There are many reasons for performing an adaptation on the balance, such as paying leave days to you employees, issuing rewards for not being ill all year, or making a correction.

Two types of adaptations can be used: individual and collective adaptations.

**An individual adaptation is performed as follows:**

Go to 'administration' → 'employee balance summary', and select the employee whose balance needs to be changed. Then, click the type of leave of which the balance has to be changed. In the top left corner, select 'new adaptation'



## leave

[new adaptation](#) [new collective adaptation](#)

### addition

- [new addition adaptation](#)

An addition adaptation will increase the balance

### taken

- [new deduction adaptation](#)

A debit adaptation is debited from the statutory balance until this balance has been used. After that, it will be debited from the balance over and above the statutory minimum

### pay out

- [new payment adaptation](#)

A payment adaptation is subtracted from the balance over and above the statutory minimum. The statutory balance cannot be paid out

### transport

- [new minus transport adaptation last year](#)

- [new added transport adaptation last year](#)

Then, select the type of adaptation needed.

### **Addition adaptation**

The balance added here can be found in the annual leave summary. It can be found under 'manual additions'. This balance will always remain exceeding statutory.

### **Taken adaptation**

The taken balance will be shown in 'taken leave'. This option is used for deducting balance which has to be taken from the statutory balance first, and when that runs out, from the exceeding statutory balance.

### **Payment adaptation**

With this function, you can pay out your employee's leave days. It is not possible to pay more than the amount of exceeding statutory leave, unless the employee's employment has been ended.

### **Minus transport adaptation last year**

This should only be used when you are using the Leavedays system for the first time, or when an employee enters employment and takes leave days with him/her. Fill in the number of hours or days, and add a reason. Then, click save to perform the adaptation.



### Added transport adaptation previous year

Again, the positive transport of last year is only used when initializing the system, or when an employee enters employment and takes leave days with him/her. At 'number of hours', fill in the total number of hours to be entered. Then, it is possible to **divide** the hours over the different spaces in which the hours can be filled in. These spaces coincide with the year balance summary.

### Example

In this example, an employee has 35 hours left, of which:

- 5 hours are statutory leave from 2012 (which expire after 1,5 years, and thus will expire in 2013)
- 5 hours exceeding statutory leave from 2012
- 25 hours from 2011

All of these have different expiration dates.

The statutory hours from 2012 have to expire on the first of July of the year in which the adaptation is processed.

The exceeding statutory hours from 2012 will be valid for 5 years in 2013. The remaining hours of 2011 will be valid for 4 year in 2013.

This example will be filled in according to the screenshot below:

kind of mutation	transport last year (added)
number of hours	<input type="text" value="35:00"/>
valid for another 5 years	<input type="text" value="5:00"/>
valid for another 4 years	<input type="text" value="25:00"/>
valid for another 3 years	<input type="text"/>
valid for another 2 years	<input type="text"/>
expires after the (fiscal) year	<input type="text"/>
expires on:	<input type="text" value="5"/>
reason	<input type="text" value="leftover balance 2011, 2012"/>

A number of hours, enter the **total number** of hours to be added, regardless of the expiration date. The system uses this to check whether the individual numbers add up to the total number filled in at number of hours.

Then, divide the 35 hours over the different expiration dates.





Meaning: from the 35 hours total, 5 hours will be valid for another 5 years, 25 hours will be valid for another 4 years, and 5 hours will expire this year (fill this in at 'expires on').

In the space next to 3 years, you can calculate the balance left over from 2010, in the space next to 2 years, you can fill in the left over balance from 2009, and expires after fiscal year, you can fill in the left over balance of 2008.

In the space next to reason, add a reason for this addition, so that the employee knows why this adaptation has been performed. Save the adaptation and the balance will be divided over the different types of acquired balance.

## Calculating balance

An employee as well as a manager and administrator can see the calculated leave balance. This shows what the balance consists of and what might be added to it with regards to senior days and seniority days. This can be viewed in the balance summary detail, by selecting "leave entitlement adaptation". In the screen that appears, select 'detail', next to 'calculation' to see the full calculation.

✕
Detail

25d (200:00)

**calculation ( employment amount \* hours per day \* percentage%)**

$25.00 * 8.00 * 100.00\% = 25d (200:00)$

**Entitlement period**

$[1/1/2016 - 1/1/2017] 366 / 366 =$ 
25d (200:00)

back

## Entering leave requests into the system retrospectively

It might be useful to add the already taken leave into the system retrospectively, so that the system is complete. This way, you and your employees have a clear overview of the leave days that have been taken. Take the following steps to accomplish this:

Go to **'leave' → 'request'**.

Check the box 'I make a request for someone else'.

Select the employee in question.

Check the box 'immediately approve'.

Select a day or days (you can select a week by selecting the week number) If needed, add a reason.

Save the request.

By selecting 'approve immediately', the request(s) will be approved and processed immediately.

You can choose to file all requests individually, or to put all of them in one request. The advantage of filing all the requests individually is that the employee will be able to view all the requests as separate requests, which otherwise would be shown as one request. A disadvantage is that this process costs a lot of time. Filing all the requests at once has the advantage that the requests will be processed quickly. A disadvantage is, as said before, that the date of the requests will not be clear at once.



## Sick report

If you also have the module for sick reports, you can see the options registering illnesses in the Leavedays system under **'Sick reports'**.

To register illness, go to **'sick reports'** ⇒ **'new sick report'** in the menu on the left. In the screen that appears, first select the employee in question, after which you can enter the correct starting date and time of the illness. You can use the little calendar and clock icons to do so.

### Sick reports

employee	-- please select --
beginning	3/10/2017 12:00  
end	
remark	The Flu
measures taken	Lots of sleep +vitamins
inform	select an employee...

save back

Fill out the box with "remark" and "measures taken", after which you can save the sick report. It is also possible to inform someone else about the illness. This can be an administrator or someone else. If the person you want to inform is not present in the dropdown menu, you can select "other". This option gives you the possibility to enter an email address, to which an email will be sent about the sick report.

### Recovered

As soon as an employee has recovered from their illness, it is necessary that this is also registered in the system. You can do this as follows:

In the menu on the left, navigate to **'sick reports'** ⇒ **'overview'**. A screen will appear, showing all current sick reports. Select the little pencil icon next to the employee who needs to be registered as recovered. The details of the sick report will be shown, along with the options "new" and "report as recovered". The option "new" allows you to fill in a new measure that was taken during the period of illness. The "report as recovered" option can be found in the top left corner, in the green header. After you have selected this button, fill out the date and time of the registered recovery. Once again, you have the possibility to inform someone of this. Don't forget to select "save".

## Sick reports

report as recovered

employee	Doe, John
beginning	3/16/2015 12:00 AM
end	
remark	The flu
measures taken	<ul style="list-style-type: none"> <li>3/17/2015 9:48 AM ad min -</li> </ul> <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;">             Lots of sleep + vitamines           </div>

After these steps, the employee will be registered as 'recovered' in the system. The period of sick leave of this employee can be viewed in the calendar summary or in the employee balance summary in the detail of the type of leave which is linked to the module register sick.

### Authorize a manager to report sick

The administrator of the system is always authorized to report employees sick or better. However, the administrator can also decide to authorize managers to register employees as sick. This option can be switched off and on for each manager individually. To do this, go to '**administration**' → '**employees**', as an administrator. Select the manager who is to receive the authorization. Then select the tab 'manager' at the bottom of the screen. There will be a box giving the option 'can report sick'. This option can be switched on as well as off.



employment **manager** user sell leave calendar logbook

temporary replacement Choose...

e-mail cc  mail if substituted

making request for own employees

can report sick

manager of

Active Employees

name	external number
min, ad	

Inactive Employees

name	external number
------	-----------------

save back

## Report

### Leave balance

In a leave balance report, an overview can be generated of the remaining leave balance of a certain type of leave or the balance of all types of leave together, of one or more employees. It might be necessary to generate a report at the end of the quarter or the year.

When a report is created containing all employees, a summary is presented at the top, and the individual employees' information is given underneath. This overview can be printed or exported to an excel file.

### leave balance report

show filter ▾

Total (hours)

period 1/1/2014 - 1/1/2015  
type of leave Normaal verlof

debit	number	credit	number	balance
transport previous	0.00	included	56.00	
year	477.62	paid out	0.00	
beginning		expired	0.00	
		transport	0.00	
	<b>477.62</b>		<b>56.00</b>	<b>421.62</b>

\* = inactive employee

name	beginning	transport previous year	total expired	included	paid	transport	residual balance
93, Test Default	45.02	0.00	45.02	0.00	0.00	0.00	45.02
min, ad Default	192.00	0.00	192.00	0.00	0.00	0.00	192.00
Seniority days, Employee with Default	188.00	0.00	188.00	0.00	24.00	0.00	164.00
With new legislation, Employee Default	52.60	0.00	52.60	0.00	32.00	0.00	20.60

The overview above will be shown, containing the selected information up until the selected date. This overview does not show which leave was taken at which time; this can be requested in a different report.

### Requests summary

This report of a selected period can show, for either one or all the employees, an overview of one or all types of leave that have been selected. This overview also contains the date of the request, the type of leave, the number of hours, the person who authorized the report, and the status of the request. This report could be useful when you need to know the number of illnesses, or who requested leave for a doctor's visit during the selected period.

### Leave taken report

This report of a selected period shows, for all employees or one department of the company, the total number of hours requested per type of leave. This differs from the request summary because it shows the total number of hours for the selected variables in the selected period. This report does not, unlike the request summary, show when the leave was taken (refer to the requests summary for this).

### Employee leaving employment report

This report shows a monthly overview of all the employees that have left the company in the month in question. Especially in big companies, it might be very useful to print one of these regularly. Furthermore, by doing this, the Leavedays system will also stay up to

date. As soon as the employee's contract expires, the employee's account has been deactivated manually. This allows a license to open up for a new employee.

### **Adaptation report**

This report shows the amount of leave that was added and deducted per leave type in the selected period. It can be requested per employee, for all employees, or an entire department.

## **Year processing**

A new fiscal year also means a new leave balance. To make sure new requests cannot be filed for the previous year, and to transfer the left-over balance to the new fiscal year, it is necessary to do end-of-year processing.

This can only be done after the year has passed, so from the first of January onwards.

### **What does the system do when processing the year?**

The system checks the remaining balance, and thereby determines the transfer balance. This is determined by the following aspects:

- Settings for types of leave:

The maximum amount of balance that can be transferred is determined by the 'max number'.

Since the 2012 legislation on leave, normal leave usually has the marker -1, meaning that all the leave days can be transferred to the next year. This is the case because the system automatically regulates the expiration dates of all the different types of leave.

- The system checks the percentage the employee works.

For instance, an employee can transfer 5 days to the next year. In a full-time contract, this would indeed be 5 days. In a part-time contract, the system checks the percentage the employee works and determines the amount of leave according to this percentage.

A problem encountered frequently is the fact that the year cannot be processed. When this happens, a notification will appear, which will tell you what the problem is. In most cases, this is due to the fact that there are still requests pending from the previous year. The system will point out which requests are the problem.

To check beforehand whether there are still any pending requests, go to '**report**' → '**request summary**'.

Export this report to Excel. Filter the statuses of the request to show '**pending**', '**changed**' or '**canceled**' → *These statuses mean that the requests still have to be assessed by a manager*

This will show an overview of any open requests in the system.

It is important that these requests are still assessed, otherwise, the year cannot be closed. Ask the managers in question to still assess these requests.

For more information, go to:

[http://support.leavedays.com/Knowledge\\_Base/processing-and-closing-a-fiscalyear/](http://support.leavedays.com/Knowledge_Base/processing-and-closing-a-fiscalyear/)

### **Close and reopen the year**

It is possible that the year has been closed, but extra adaptations have to be processed, or certain aspects have not been handled correctly, such as added balance. The closed year can still be reopened to implement these changes. Go to **'administration'** → **'year processing'** to reopen the year. You can then perform the necessary adaptations to the balance, and then close the year once more. In case it involves only one employee, you could also reopen the year for just this employee. This can be done by going to the employee balance summary of this employee. At the bottom of the screen, after you have selected the correct year, there is an option to 'reopen' the year for this employee. Select this option and you will be able to implement the changes. As soon as you are done, go back to the balance summary and close the year once again.

## **Going live**

Please contact the Leavedays team to aid you in the process of going live with the Leavedays application.

### **Any more questions?**

In case you still have (partly) unanswered questions, we urge you to take a look at our support page:

[Http://support.leavedays.com](http://support.leavedays.com)

This well-visited website contains up-to-date information about the application, and answers to many frequently asked questions. We would advise you to look for your question in the database, by typing it in the search bar.

Still haven't found the answer? Send us an email at [support@leavedays.com](mailto:support@leavedays.com). During office hours (Monday through Friday from 9:00 until 17:00) you can count on a reply within one work day.

We are also available to administrators and system managers at 010 – 238 20 45

The opening hours of our phone lines are:

Monday: 9:00 – 12:00 / 13:00 – 17:00  
Tuesday: 9:00 – 12:00  
Wednesday: 9:00 – 12:00  
Thursday: 9:00 – 12:00