



Holiday Planner: Important considerations

The first steps in setting up the Holiday Planner are creating Day types, Zones and the holiday groups within Zones.

We recommend reviewing the information in this guide before starting to make changes to your site.

To inform these changes, **review the needs of your user base before proceeding:**

- Who you want to be able to approve their holiday (one person, with a substitute to be notified in their absence)
- The Location/country users are in, and which public holidays will need to apply to them
- Which month should their holiday year start
- Their working pattern (if not the default Mon-Fri)
- Whether you want them to be able to carry holidays over to the next year
- What each individual's quota of days is
- What day types you need and their effect on the user quota
- Do you want users to see each other's holidays? If so, is this everyone, or users within the same group, or users across the same holiday group manager

From this, the most important aspects that reveal your setup are:

1. The day types users can book and how these affect their quota
2. Which Zones are needed
3. Within these, are there any different user working patterns (if not Mon-Fri)
4. Across those groups, which users will be set as the manager or substitute (and handle the requests)
5. Any holiday visibility requirements (explained further below)

Day types

These can be created by an administrator before Zones & groups, by following this guide.

Create all the day types you would like users to be able to book, and set whether these need approval and if they take from the quota.

Once Zones & groups have been set up, users will be able to start making requests for the day types.

Zones

With the above questions answered, you should be able to tell which Zones you need to set up in the planner.

Zones are typically countries, because they may have different requirements between them:

- **Public holidays are set per Zone**

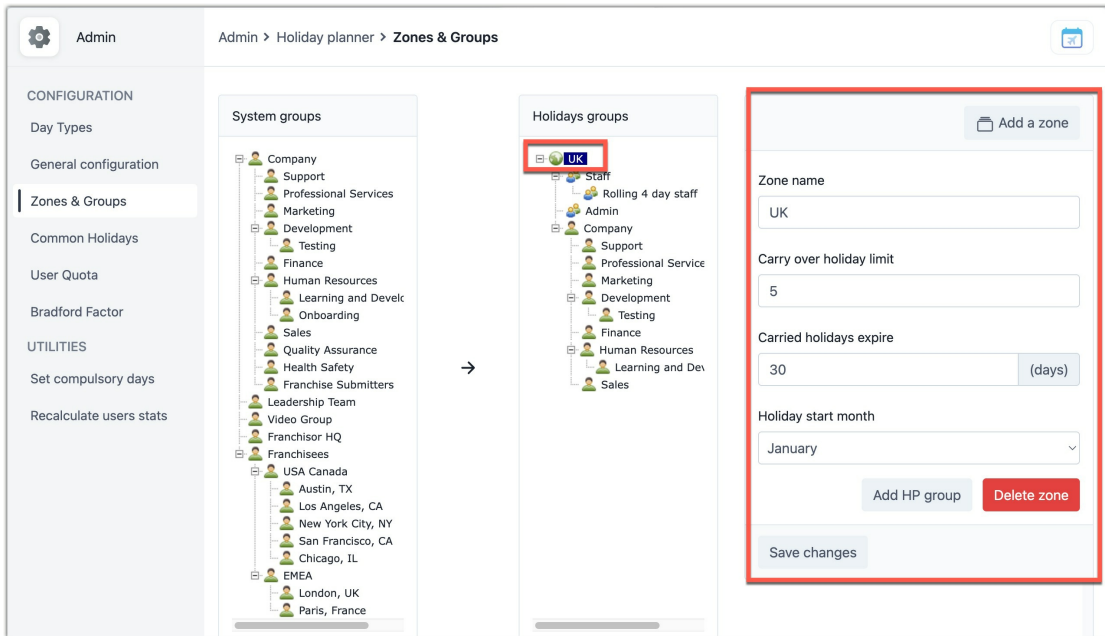
The public holidays in Spain, the UK vs USA are different, so we need to ensure users in those areas have the correct holidays pulling through to their calendar. This is achieved by creating a Zone for each area and creating the holiday groups with the appropriate users within these.

- **The month the holiday year starts can be set per Zone**

Company policy or local law may differ about when the holiday year starts

- **How many days can be carried over (and if these expire) can be set per zone**

Whether this is allowed likely differs per area, so your administrators can set this as required using Zones.



Holiday Groups

Once the Zones have been decided, the next element to consider is the holiday groups themselves.

Holiday groups are created within Zones, ensuring the users within have the correct public holidays, holiday year start date and carry over days (if set)

Creating groups

There are two ways holiday groups can be set up in the planner.

Decide which works best for your team, as each is managed over time in a different way.

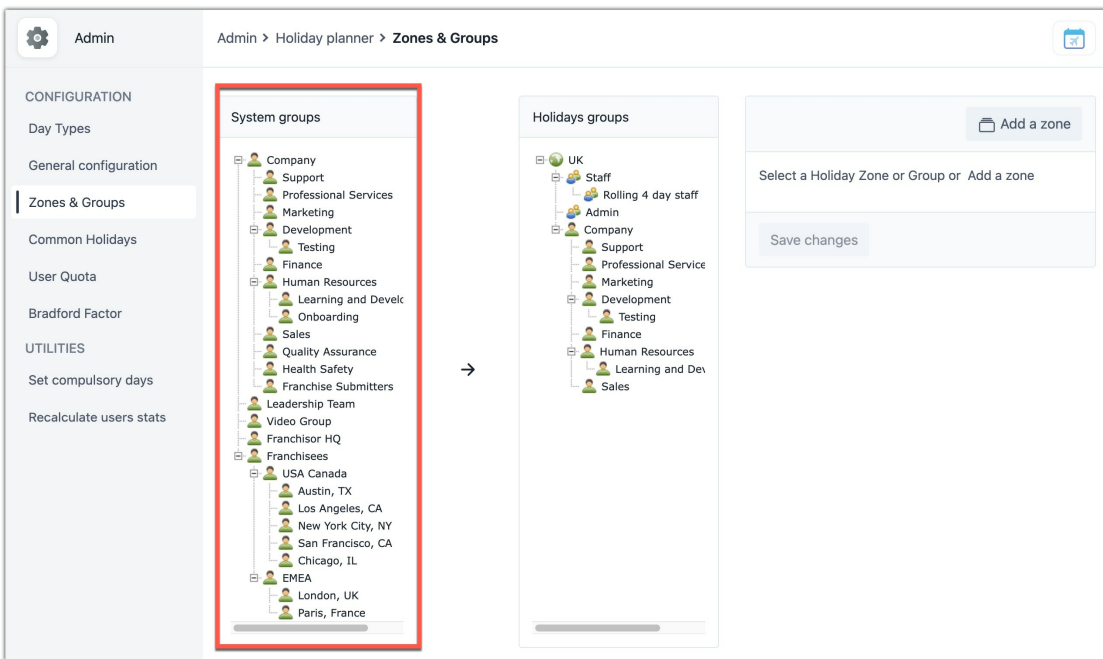
1. Using People groups

The [groups your team create in People](#) can be used to create the holiday groups.

Groups in your system will be listed on the admin side of the Holiday planner, as shown below.

With this option, changes to holiday group membership need to happen in People and not Holiday Planner.

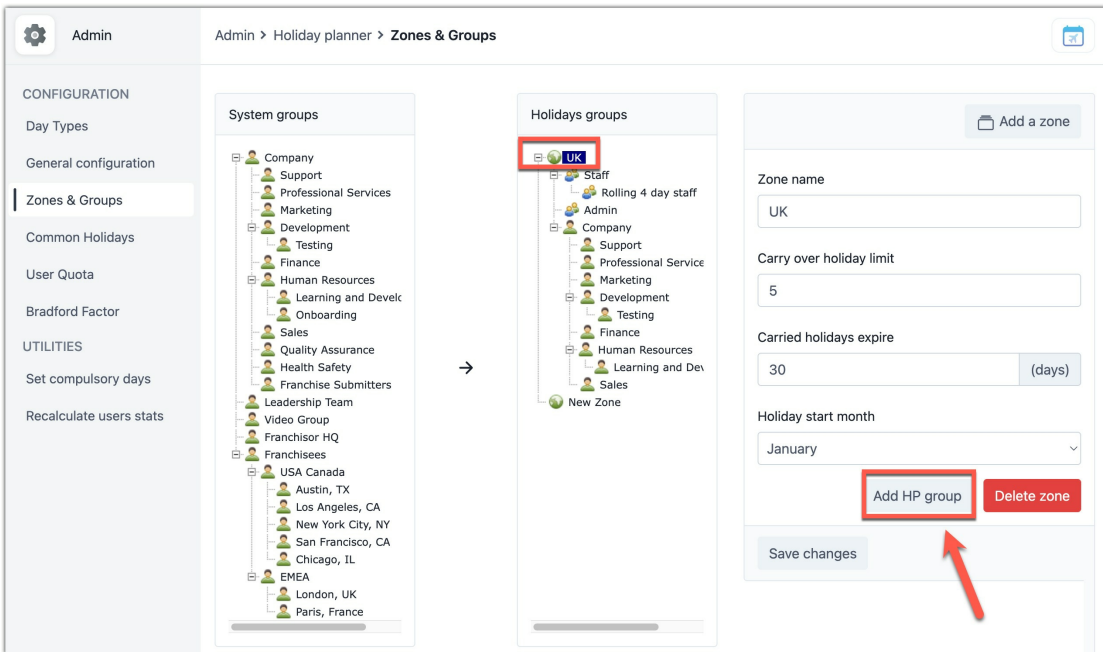
Please note: If your site [syncs groups](#) rather than administrators manually creating these, updates have to take place in the external repository first, e.g. Azure, Okta, etc.



2. Using custom holiday groups created in the application (Recommended)

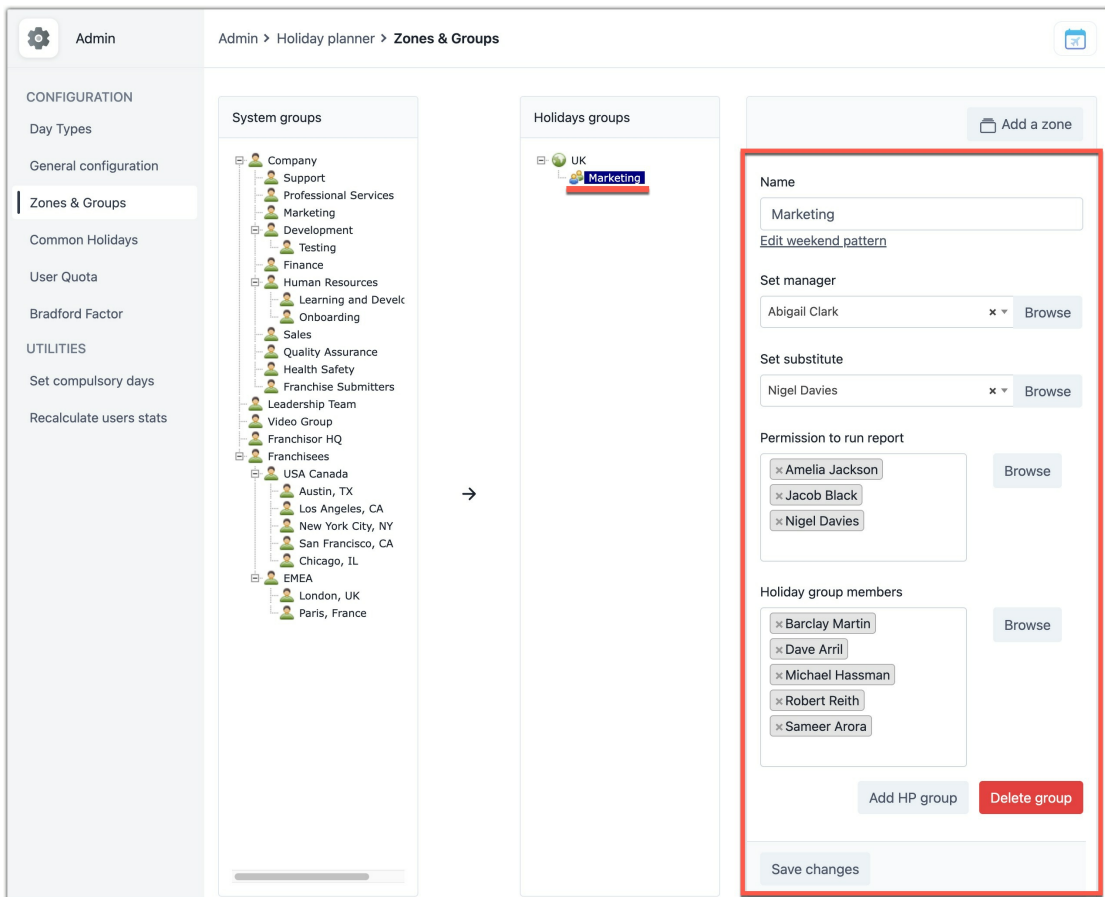
Create holiday groups directly in the planner under Zones and add users as members to each group as you go.

Control over group membership can be updated at any time by an administrator of Holiday Planner.



Setting managers on groups

As groups are added, their settings can be configured.



- **The weekend pattern**

The default is Mon - Fri, but it can be changed to different patterns. Members of this group will see the pattern in their calendar when making bookings. Create groups to cover all the working patterns needed within a Zone.

- **Set the Manager**

Select the person who will be notified when users in this group create new bookings that require approval. They will be able to approve/deny/edit requests for all group members.

- **Set substitute**

Select the person who will be notified if the manager of the group is absent and a group member creates a booking that requires approval. They will be able to approve/deny/edit requests for all group members.

- **Choose group members**

Select all users who should be a member of this group and interact with the planner based on its settings and Zone that it is in.

Holiday Visibility

If you want everyone to be able to see each other's holiday, an additional group containing all users needs to be created at the bottom of the structure. (This is because if a user is in more than one group, the one listed highest in the structure will be applied)

Alternatively, visibility can be controlled by the 'My team' setting in the planner, restricting visibility to the same holiday group or those under the same holiday manager (potentially spanning multiple groups)

One of these options should work for the visibility you are trying to achieve.