



Creating Zones & Holiday Groups

Now that [everything has been considered](#), you can create the Zones, Holiday groups and settings in Holiday Planner to complete its set-up.

Creating Zones

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1. Head to Applications > Admin > Holiday Planner > Zones & Groups
2. Click the 'Add Zone' button
3. Fill out the details of the zone
4. Click 'Save changes'
5. Repeat to create all Zones required

Apply the public holidays for each Zone

Ensure these are marked in all users' calendars so they do not have to book them off, or accidentally apply a booking over them and lose a day from their quota.

In the video below, a public holiday (New Year's Day) is being set for the UK zone, as well as Independence Day for the USA zone.

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1. Click into the 'Common holidays' tab
2. Each Zone created is listed here
3. It's best to work month by month and update all relevant dates for each Zone before moving to the next one
4. Change the month to open its corresponding dates for all Zones
5. Using the boxes, select the dates that should be a public holiday for a zone
6. Click 'Global Holiday' to apply this, and the screen will update to show this has been saved
7. Any user within the Zone who applied for this day will have this date marked as a holiday in their calendar
8. Repeat this for each Zone's public holidays until they are all marked
9. Administrators can choose to set the dates in advance or check back yearly to apply them for the upcoming year

Creating Groups

Your team will have decided [which method they will use to create the groups](#).

Follow the corresponding steps below to add all the groups you need under the appropriate Zones on your site.

Using people groups

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

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1. Drag & drop the groups into the zones to use the People group membership as holiday groups.
2. Set a manager and substitute
3. Set users who can access reports about this group (managers and admins have this ability by default)
4. Click 'Save group'
5. If applicable, change the weekend pattern (If different from 5 weekdays and 2 weekend days over 7 days) and save this. The video below shows a 4-day on 4 day off pattern being applied to a group and how the planner calendar will appear to users in it:

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6. Repeat steps 1 - 5 until all groups you need have been moved across and their settings filled out
7. Users can start to make bookings for managers to approve/deny (in line with **their quotas**)
8. Future changes to the user holiday group membership take place in the People application (not holiday planner), either by an administrator as outlined [here](#).
9. **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.

Using custom holiday groups created in the application (Recommended)

Create holiday groups directly in the planner, adding users to these as you go.

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1. Click on a Zone you want to create a holiday group within
2. Click the 'Add HP group' button
3. Give the group a title
4. Set a manager and substitute for it
5. Set users who can access reports about this group (managers and admins have this ability by default)
6. Add users to the group by manually typing them or clicking the 'browse' button
7. Click 'Save changes' to create the group and apply your choices
8. If applicable, change the weekend pattern (If different from 5 weekdays and 2 weekend days over 7 days) and save this. The video below shows a 4-day work week being applied to a group and how the planner calendar will appear to users in it:

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9. Repeat steps 1 - 8 until all groups you need have been created with their details filled out and members selected
10. Users can start to make bookings for managers to approve/deny (in line with **their quotas**)
11. Future changes to the user holiday group membership take place in the Holiday Planner. Administrators can edit the groups and remove/add users as required, being sure to 'save group' each time to apply.