



How to add a day type in Holiday Planner

Introduction

Within the Holiday Planner application, you are able to add and edit day types. This allows you to configure what requests users can make.

Adding a Day

You will need to go to:

Admin > Holidays

From here you will be presented with 'Day types'. You will need to select 'Add day' in the top right-hand corner.

Admin / Holiday planner

Configuration		Day types + Add day					
Day Types	Day character	Day type name	Approval required	Can be ½	Quota change	Weekday type	User commen
General configuration		Global work day					
Zones & Groups		Usual work day					
Common Holidays		Global Holiday					
User Quota		Weekend					
Bradford Factor	H H? H!	Holiday	True	True	-1	Working days	Mandatory
Utilities	W W? W!	Work day	True	True	+1	Non-working days	Mandatory
Set compulsory days	S	Sickness day	False	True	none	Working days	Optional
Recalculate users stats	U U? U!	Unpaid holiday	True	False	none	Working days	Mandatory
	T	Test	False	False	none	Working days	Mandatory
	L	Late	False	False	none	Working days	Mandatory

You will then be able to create the day type, and also assign it a colour.

Day type configuration ✕

Day type name

Day character

Quota change

Font color

Background color

Approval required

Half days allowed

Can be set on working day

Can be set on non-working day

User comment mandatory

Approved

Day type name: The name of this type of day (e.g. sickness/ holiday /remote working).

Day character: The character that will represent this day in the calendar (e.g. sickness would be 'S').

Quota change: Should this day take from the users holiday allowance total ('Remote working' should not but 'Holiday' should).

Approval required: Users may be able to book 'Remote working' without approval, but 'Unpaid leave' may require approval.

Half days allowed: If users can book a half-day, no other day types can be booked over that day.

Can be set on working day: It makes sense for holidays to only be counted when booked over working days.

Can be set on non-working day: If you have a day type called 'Weekend overtime' for example, this will need to be checked.

User comment mandatory: Should the user need to give a reason for booking the day type?

How to edit an existing day

This again is done through the **Admin** panel. You will need to start by clicking on the day you wish to change. This will bring up a similar pop-up window.

For example, if you want to change 'Holiday' you will need to click on the text.

Day types + Add day						
Day character	Day type name	Approval required	Can be ½	Quota change	Weekday type	User comment
	Global work day					
	Usual work day					
	Global Holiday					
	Weekend					
H H? H!	<u>Holiday</u>	True	True	-1	Working days	Mandatory
W W? W!	Work day	True	True	+1	Non-working days	Mandatory
S	Sickness day	False	True	none	Working days	Optional
U U? U!	Unpaid holiday	True	False	none	Working days	Mandatory
T	Test	False	False	none	Working days	Mandatory
L	Late	False	False	none	Working days	Mandatory

Day type configuration dialog box for 'Holiday'. Fields include: Day type name (Holiday), Day character (H), Quota change (-1), Font color (#660033), and Background color (#FFCCCC). Checkboxes for 'Approval required', 'Half days allowed', and 'User comment mandatory' are checked. Radio buttons for 'Can be set on working day' and 'Can be set on non-working day' are present. A legend shows 'H' for Approved Holiday, 'H?' for Unapproved Holiday, and 'H!' for Declined Holiday. Buttons at the bottom include 'Create copy', 'Cancel', 'Save', and 'Delete'.

Once the changes have been completed you will need to select 'Save'.

How to delete or hide a day type

From the 'Day Types' tab, click on the appropriate 'Day Type Name' you wish to edit.

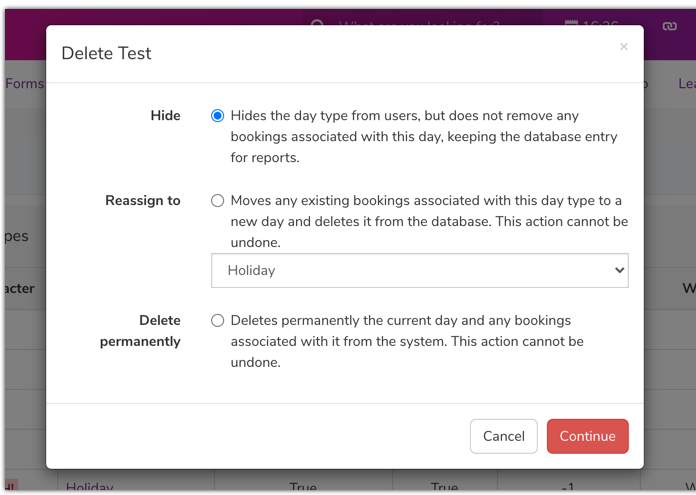
Please note: Hardcoded day types cannot be deleted or hidden

Day character	Day type name	Approval required	Can be 1/2	Quota change	Weekday type	User comment
	Global work day					
	Usual work day					
	Global Holiday					
	Weekend					
H H? H!	Holiday	True	True	-1	Working days	Mandatory
W W? W!	Work day	True	True	+1	Non-working days	Mandatory
S	Sickness day	False	True	none	Working days	Optional
U U? U!	Unpaid holiday	True	False	none	Working days	Mandatory
	Test	False	False	none	Working days	Mandatory
	Late	False	False	none	Working days	Mandatory

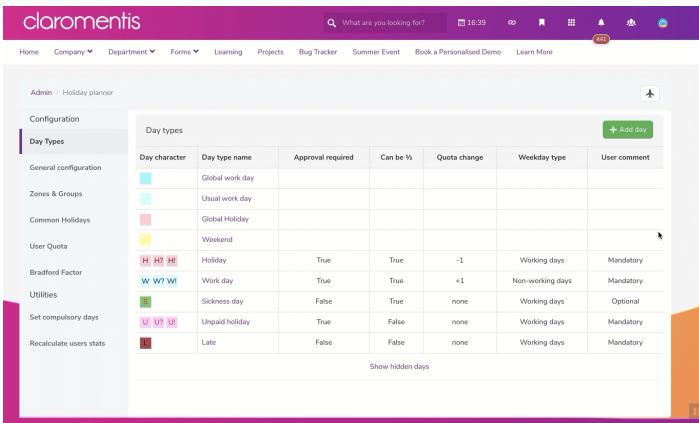
This will display a pop-up with a 'delete' button on the bottom right.

Day type configuration dialog box for 'Test'. Fields include: Day type name (Test), Day character (T), Quota change (none), Font color (#000000), and Background color (#0000ff). Checkboxes for 'Approval required', 'Half days allowed', and 'User comment mandatory' are present. Radio buttons for 'Can be set on working day' and 'Can be set on non-working day' are present. A legend shows 'Approved Test'. Buttons at the bottom include 'Create copy', 'Cancel', 'Save', and 'Delete'.

Once clicked, three options are given with a description of what each entails:



Hidden day types can be reactivated at any time by an application administrator of Holiday Planner:



Please note: Reassigning a day to another day type, or deleting the day type as it currently stands are not reversible actions, all data associated including previous bookings are removed.