



## Administrator: Setting up Holiday Planner

### What is Holiday planner?

A holiday booking system with a built-in approval system.

The tool is highly configurable to suit your company's holiday set-up, this includes:

- Setting up different day types (Vacation, Sickness, Working Remotely etc)
- Configuring different weekend patterns (per group)
- Setting up teams so users can be aware of their colleagues booked holiday
- Configuring regions, so different public holidays can be set for each country
- Different holiday allowances per user (if relevant)
- Carryover restrictions

This guide will work through each of the configuration options to help you set up holiday planner correctly.

### The admin side

In order to configure Holiday Planner, you must have application administrator access to the tool. This can be granted by a [sysadmin](#) in Applications > Admin > System > Administrators. Once done, this is what you will see, we will work through each setting one by one.

Admin / Holiday planner

Configuration

- 1 Day Types
- 2 General configuration
- 3 Zones & Groups
- 4 Common Holidays
- 5 User Quota
- 6 Bradford Factor
- 7 Set compulsory days
- 8 Recalculate users stats

Utilities

Day types					
Day character	Day type name	Approval required	Can be ½	Quota change	Weekday type
<span style="color: cyan;">■</span>	Global work day				
<span style="color: lightblue;">■</span>	Usual work day				
<span style="color: pink;">■</span>	Global Holiday				
<span style="color: yellow;">■</span>	Weekend				
<span style="color: red;">H H? H!</span>	Holiday	True	True	-1	Working days
<span style="color: cyan;">W W? W!</span>	Work day	True	True	+1	Non-working days
<span style="color: green;">S</span>	Sickness day	False	True	none	Working days
<span style="color: pink;">U U? U!</span>	Unpaid holiday	True	False	none	Working days
<span style="color: blue;">T</span>	Test	False	False	none	Working days
<span style="color: red;">L</span>	Late	False	False	none	Working days

# 1- Day Types

This section simply allows you to set up all the various day types you would like users to be able to log. Some of the more common ones are listed above, but you may have more unique options available to staff that you would like to include. When adding a day type you will have the following options:

Day type configuration ×

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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 character refers to the letter that will represent the day in the calendar - like so:

M	T	W	T	F	S	S
			1	R	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	R	24	25
26	27	28	29	30	31	

Quota change determines whether it will be taken from your holiday allowance. A day booked off as 'Working remotely' should not take from the quota, but 'Holiday' should. You can decide if manager approval is necessary for that day type or if the users need to leave a comment or reason why the day is needed. For further details on this process, please see [this article](#).

## 2 - General Configuration

Here you will be able to make the following choices.

Admin / Holiday planner / General configuration

**Configuration**

Day Types

**General configuration**

Zones & Groups

Common Holidays

User Quota

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**iCal notification**  
Send holiday email notification with .ics calendar file upon holiday confirmation (Please Note: if this option is selected user won't receive in-sy)  
 Yes  No

**"My team" definition**  
Users within the same team will be able to see each others' holidays. Specify how a team is defined  
Users with the same manager

**Allow team members to view full list of each others holidays requests**  
 Yes  No

**Display calendar days (elapsed days) along with effective days when applicable**  
 Yes  No

**Number of entries per page in reports**  
20

Save Configuration

An important one to note is the "My team" definition, this will determine what defines whether a team can see each other booked holidays. You can either set it so all users with the same manager can see each other's holiday or alternatively, it can be 'Users within the same groups' which we will come to next. There is more information on this [here](#).

### 3 - Zones & Groups

On the left of this image, you will see the 'System groups' these are the ones that are set up already in Admin > People.

If you wish to use these they can make the process of setting up holiday groups a bit quicker as you can simply drag and drop the groups over to the 'Holiday groups' on the right nesting them under the correct zone.

Still set a manager/substitute on these groups to ensure notifications for bookings are received but crucially - if a user needs to change groups, you will need to make changes to their membership in People and not Holiday Planner.

Remain vigilant that each user is only represented by one People system group in the structure.

The alternative and more common method is to create a new structure for holiday groups manually, with its ongoing management directly in Holiday Planner; this is detailed below.

Admin / Holiday planner / Zones & Groups

**Configuration**

Day Types

General configuration

**Zones & Groups**

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**System groups**

- Company
- Support
  - Customer support
  - Professional Services
- Marketing
- Development
  - Testing
  - Finance
- Human Resources
  - Learning and Develop
  - Sales
- Leadership Team
- Market Intelligence
- Example of further ct
- TSN Viewers
- Video Group

**Holidays groups**

- UK
  - Admin
  - Staff
    - Rolling 4 day staff
  - Development
    - Testing
  - Leadership Team
  - Market Intelligence
    - Example of further
  - TSN Viewers
  - New HP Group
  - Video Group
  - Zone 2

Add a zone

Select a Holiday Zone or Group or

Add a zone

Save changes

Use drag and drop for creating holiday groups structure.

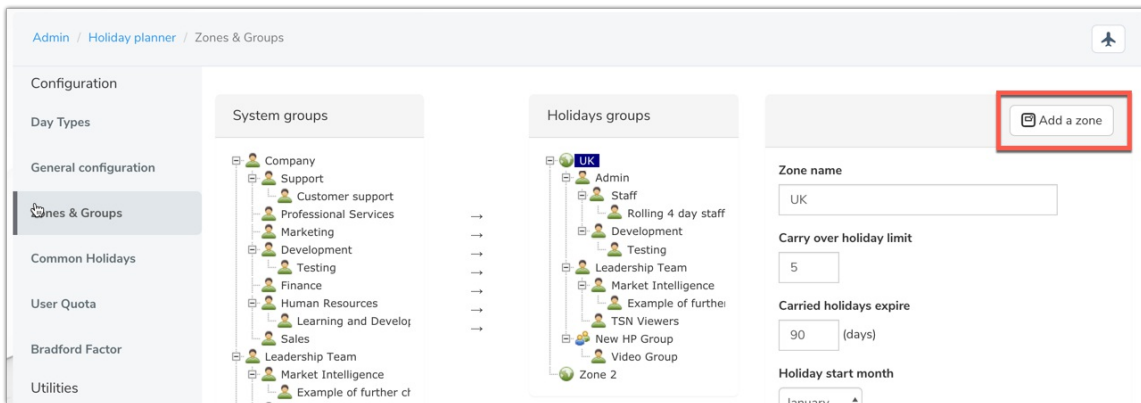
- Add holiday zones you need.
- Drag group from system groups tree to holiday tree.

Warning: zone and group names cannot contain <, >, & or quotes. These will be removed automatically when saving

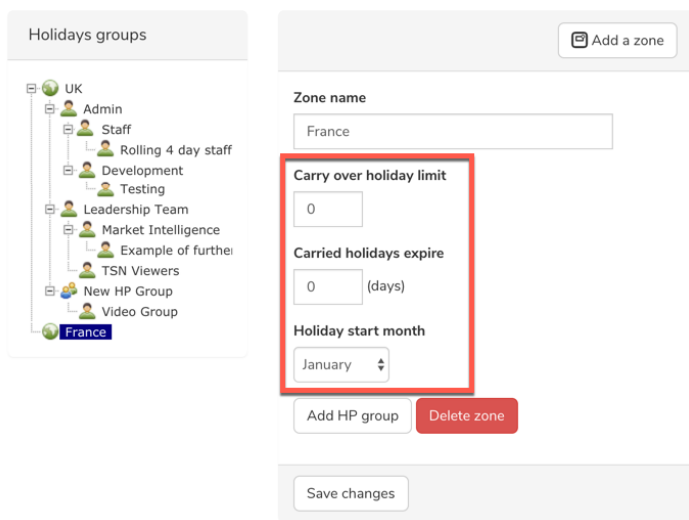
Zones are typically countries. It is important to set up a different zone for each country that you have users in because they will likely have different public holidays.

### How do I add a zone?

Start by clicking here:



You will get to define some different rules for this new zone such as the carryover limit, when the carryover should expire and the start month for holiday:



### Holiday Planner Groups

These can be arranged how you would like, they typically reflect the team structure within the organisation.

### How do I add a holiday planner group?

Click on the zone you would like to add the group beneath and you will see the button called 'Add HP group' located at the bottom (shown in the above screenshot). When clicked the following options will appear:

Here you can label the group e.g. Marketing (France) you will need to enter the name of the approving manager and the substitute manager (this user will pick up any requests when the main manager is absent). You can run reports to see who has booked off what type of days and when, this may be helpful if looking into sickness - you may just want the manager to be able to run reports on this group.

Finally, you will need to add all the users who are included in this group.

## Weekend Pattern

By default, the working vs non-working day pattern for a holiday group created will be 5 weekdays and 2 weekend days over a 7 day period.

This can be changed to better fit for any employees that do not fit this pattern.

Set the date to a relevant one to allow you to match up the employee's workdays appropriately.

Edit the pattern length to allow the employee's schedule to be input and check the box against the non-working days.

Save the pattern and the calendar preview at the top of the page will update to reflect the pattern applied.

e.g. A 4 day on, 4 day off working pattern has been configured above.

On the front end of Holiday Planner users will see the pattern of the group they are in reflected in the calendar of their 'My holidays' area:

Holiday Planner Video Guide - Creating new Holiday Zones, Groups and Common Holidays

## 4 - Common holidays

Also known as public/bank holidays. Here you can log this per zone. When you add a new zone in the 'Zones & Groups' section, it will automatically populate here:

To add a day follow these steps:

- 1- Set the month
- 2 - Click the day
- 3- Select 'Global Holiday'

Common Holidays ✈

March 2020 1

Holiday zones	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
France																																		
Current year																																		
Every year		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
UK																																		
Current year																																		
Every year																																		

Select days and click below on the day type you want to set

Reset to default
Global work day
Global Holiday 3

Step 3 initiates the change and saves this day as a global holiday. To check this has worked correctly, navigate to the front end of the application and check the 'My Holidays' calendar you will see the full view of the year and can see that the change has been made (this will only work for the zone you are in).

If you make a mistake, you can simply select the day here again, and either choose 'Reset to default' or 'Global work day' which will revert the day back.

## 5 - User quota

Every intranet user is listed here, and you can individually set their user quota, or update them up to 500 at a time, to do this second option, you will need to follow these steps:

- 1 - Use the advanced search
- 2 - Set the search to show 500 results (and click search)

Name: 1

Advanced search ✕

Keywords  Any ▾

Group  Any ▾

With subgroups

First name

Surname

Job Title



Company

Search  2

				Quota for holiday year started in			
				2020 ▾			
		Holiday start month	Holidays	Inherited			
		January	<input type="text" value="25"/>	Since 2020			
		January	<input type="text" value="25"/>	Since 2020			
		January	<input type="text" value="25"/>	Since 2020			
		January	<input type="text" value="25"/>	Since 2020			
	Anne Wilkins	Line	Professional Services, Company	Primary Area	January	<input type="text" value="25"/>	Since 2020
	Austin Glover	none	Marketing, Company	Primary Area	January	<input type="text" value="25"/>	Since 2020

- 3 - Scroll to the bottom of the page and enter the quota
- 4 - Click 'Set' all the figures in that folder column should now update

5 - Finally, click 'Update' to save the changes

			Company, Video Group				
	Joanne Thomson	none	Support, Company, Video Group	Primary Area	January	<input type="text" value="25"/>	Since 2020
	Joe Bloggs	none	Finance	Primary Area	-	<input type="text" value="0"/>	Since 2020
						Quota for listed Users	<input type="text" value="3"/> <input type="button" value="Set"/> <input type="text" value="4"/>
<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/>							

## 6 - Bradford factor

There is a full article on this [here](#)

## 7 - Set compulsory days

There may be instances where users need to take compulsory leave i.e. the days between Christmas and New Year or compulsory work days i.e. working on what would usually be a non-working day for a business reason.

This is separate to any public holidays already configured and fulfils an entirely different purpose.

Claromentis allows for broad control over this function, so you can set up a compulsory day for any type to fulfil different needs and determine if this will affect the users holiday quota and in what way (if appropriate)

This can be done by team or zone as a whole.

Simply select the team, select the date, select the day type and click save. To revert this change, just follow the same steps but set it back to a default day.

### Edit compulsory days

#### Groups

- UK  1
  - Admin
  - Staff
    - Rolling 4 day staff
  - Development
    - Testing
  - Leadership Team
  - Market Intelligence
    - Example of further child groups
  - TSN Viewers
  - New HP Group
  - Video Group
- France

#### Check weekend days

2  To:

#### Day types

- 3 S Sickness day
- U Unpaid holiday
- H Holiday
- W Work day
- T Test
- L Late
- Default Day Type

4

## 8 - Recalculate user statistics

This can be a really helpful tool for resetting user statistics that seem incorrect. This can sometimes happen if a lot of changes have been made to the data etc.

For full guidance on this, please see [this article](#).



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Tags: [booking](#), [holiday](#), [manager](#), [planner](#), [request](#)