# 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

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### Day types

| Day character | Day type name | Approval required | Can be ½ | Quota change | Weekday type |
|---|---|---|---|---|---|
| | Global work day | | | | |
| | Usual work day | | | | |
| | Global Holiday | | | | |
| | Weekend | | | | |
| H H? H! | Holiday | True | True | -1 | Working days |
| W W? W! | Work day | True | True | +1 | Non-working days |
| S | Sickness day | False | True | none | Working days |
| U U? U! | Unpaid holiday | True | False | none | Working days |
| T | Test | False | False | none | Working days |
| L | 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**                                          ×

| | |
|---|---|
| **Day type name** | |
| **Day character** | |
| **Quota change** | none ⇕ |
| **Font color** | #000000 |
| **Background color** | #0000ff |

☐ Approval required
☐ Half days allowed
◉ Can be set on working day
○ Can be set on non-working day
☑ User comment mandatory

▉ Approved

Cancel      **+ Add day**

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 ⬛ 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.



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.



Zones

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'



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)



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

| | Joanne Thomson | none | Support, Company, Video Group | Primary Area | January | 25 | Since 2020 |
|---|---|---|---|---|---|---|---|
| | | | Company, Video Group | | | | |
| | Joe Bloggs | none | Finance | Primary Area | - | 0 | Since 2020 |

Quota for listed Users **3** **Set 4**

1 2 3

Update **5**

# 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.



# 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.