

MANAGER GUIDE

Inputting Annual Leave

This guide offers step-by-step instructions for business managers inputting annual leave on behalf of their employees. It covers everything you need to know, from recording annual leave to creating adjustments and carry-forward entries.

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Please note that you will need to add any carry-forward balance and record any bookings made so far this year. The guides provide step-by-step instructions to support you.

Recording Annual Leave

1. From the main dashboard, click **Your Staff**.
2. In the search field, enter the employee's name. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section on the right-hand side of the screen.
5. Select **New – Holiday Absence**.



The following page will open:

The screenshot shows the 'Holiday absence details New' form. The form has a dark blue header with 'MENU', 'refresh', and 'print' icons. The form is divided into sections: 'Holiday period' with a dropdown set to 'More than one day'; 'Holiday start' with 'Holiday start date' and 'Holiday start type' (set to 'Full day'); 'Holiday end' with 'Holiday end date' and 'Holiday end type' (set to 'Full day'); 'Absence' with 'Absence type' (set to 'Personal holiday'), 'Authorisation' (set to 'Not applicable'), and 'Position' (set to '<All Jobs>'). At the bottom, there is a '+ Holiday balances' link and a green 'Save' button. On the right side, a dropdown menu is open, showing options: 'More than one day', 'Part day', 'Full day', 'Full day', 'Part day' (highlighted), and 'Half Day - PM'.

6. Use the drop-down arrow to select the **Holiday Period**.
 - **Note:** Depending on the option selected, some fields below may not be relevant and will disappear.
7. Enter the **Holiday Start Date**.
8. Enter the **Holiday End Date**. (if the absence is more than one day)
9. The **Absence Type** will default to **Personal Holiday**.
10. **Authorisation** is not applicable.
11. Click **Save**.

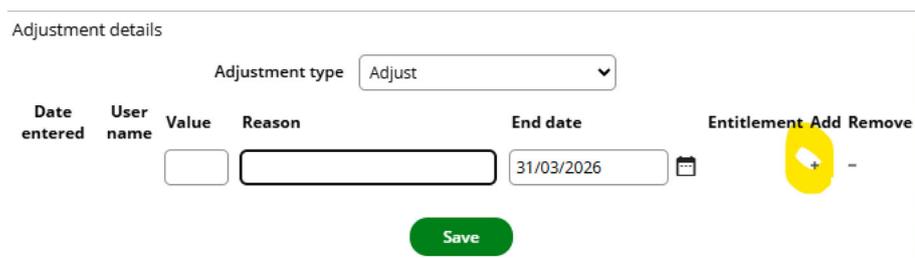
To view holiday balances, select the **Holiday Balances** button at the bottom of the screen by clicking the + icon. This view is read-only.

Holiday Entitlement Adjustment

Please note: If an employee is carrying forward leave from a previous holiday year, this must be entered on this screen as an **Adjustment**. When doing so, ensure **Carried Forward** is entered in the **Reason** field.

1. From the main dashboard, select **Your Staff**.
2. Enter the employee's name in the search field. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section.
5. Select the **Holiday Entitlement Adjustment** screen.
6. Select the correct **Position** (if more than one is listed).
7. Select the **Holiday Period Dates**.
8. The **Scheme Name** will populate automatically.
9. In the **Adjustment Type** field, select **Adjust**.
10. Enter the **Value** (this can be a positive or negative figure).
11. Enter **Carried Forward** in the **Reason** field.
12. The **End Date** will automatically populate from the selected **Holiday Period Dates**. Do not amend this field. If the date is incorrect, return to Step 7 and ensure the correct holiday period is selected.
13. Click **Save**.

To add more than one adjustment, click the + icon. To remove an adjustment, click the – icon.



Adjustment details

Adjustment type: Adjust

Date entered	User name	Value	Reason	End date	Entitlement Add Remove
				31/03/2026	+ -

Save

Holiday Entitlement Summary

1. From the main dashboard, select **Your Staff**.
2. Enter the employee's name in the search field. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section.
5. Select **Holiday Entitlement Summary**.
6. Select the correct **Position** (if more than one is listed).
7. Select the appropriate **Holiday Period Dates**.
8. The screen will automatically populate to display the following information:
 - Entitlement for the selected period
 - Holiday and Bank Holiday start and end dates
 - Duration
 - Remaining entitlement

You should now be able to confidently record employee holiday, apply carry-forward adjustments, and view holiday entitlement summaries. Please ensure all information entered is accurate and reflects the correct holiday period before saving.