## Installation Guide

# The Holiday System



Signup to the holiday system at <a href="https://www.theholidaysystem.biz/signup">www.theholidaysystem.biz/signup</a> Complete your companies details as shown in the example:

## Holiday System





## Please complete form below to signup to The Holiday Booking System

Company Name:	The Holiday System
Address:	1 Morton Terrace Gainsborough
Post Code:	DN21 2RF
County / State:	Lincolnshire
Country:	United Kingdom
tel:	0330 333 9090
Email address: (this email address will be used for comunications and invoices only)	Manager@theholidaysyter
Please enter start date of your holiday year:	01/01/2013
Rollover Limit(Days): (the maximum number of leave days an employee can carry forward from the previous year.)	5
Default Yearly Leave: (this can be changed later)	25
We will now setup up your first user account.	This will be the HR Admin account. (This can be changed later)
Name:	Richard Harvey
Email address:	Hrmanager@theholidaysy
Password:	•••••
Password confirm:	•••••
You will be able to change any of the details	when you have logged in.
I agree to Harveys IT Ltd standard terms	and conditions. "Click here"
Create Account Now	

#### **Explanation**

Please enter the first day of your holiday year. If today is 30th oct 2013 and your holiday year runs 1st Jan to 31st Dec. enter 01/01/2013

Roll over limit. This is the max number of days that an employee can carry over to the next holiday year.

Default yearly leave.

This is the default number of days used. This can be amended as each member of staff is setup.

Now we setup the first account. This should be the HR Manager.

When completed you will get this confirmation screen.

### Holiday System





### Signup for a Holiday Booking System

### Congratulations

Your Holiday system has been successfully setup.

Click here and log in with your email address (Hrmanager@theholidaysystem.biz) to begin.

## Step 2

Login as the HR Manager with the email and password you entered on the signup screen.

## The Holiday System



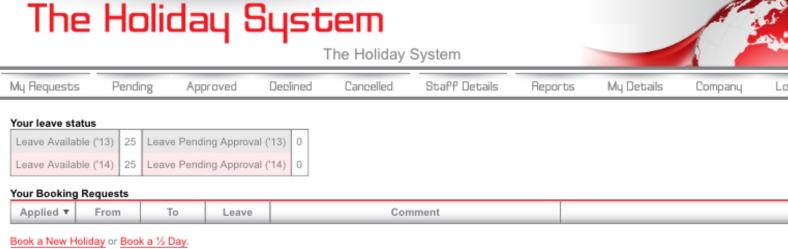


### Please login

Click <u>here</u> to I	have your password sent to	your email adddress .
Email:	Hrmanager@theholidaysy	
Password:	•••••	
Sign In		

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You will be taken to the HR Manager home screen. This will also show you the HR Managers holidays.



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From this screen you will administer all the functions of the holiday system have a look through the menus, most of them will be empty, however they will soon fill up when someone books a holiday.

### Step 3

Create your first group manager. The group manager is a none HR manager who will approve holiday requests for their staff that report to them. The system users a hierarchy structure. In this example Richard Harvey is the HR Manager, so he is the only person in the list, until you add some managers.



Taken

84

0

next year

Pending

Available

25

Manage Retired Staff Add a New Member of Staff Heirachy Export List Staff Leave Report

Taken

this year

Pending

Available

25

Employee ▲

Richard Harvey

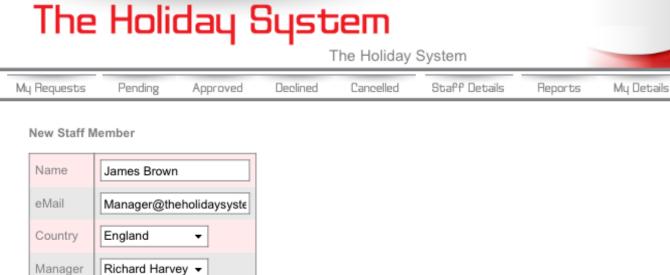
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### HR Manager

- Manager 1
  - Staff 1
  - Staff 2
- Manager 2
  - Staff 3

The HR manager can see all staff records. The managers can only see limited data for thier staff. You can change the manager / HR manager at any time for individual staff.

To create a user, go to staff details and choose "Add a new member of staff". Enter the details for this member of staff. Note you can set the leave for the current year. Press create.



Manager

'13 Leave

Create

25

Company

You will then be taken to the user details where you can amend holiday entitlements and make the user a manager.

TIP create all HR users and Mangers first.

Approved

Declined

Pending

My Requests

# The Holiday System The Holiday System

Staff Details

Reports

My Details

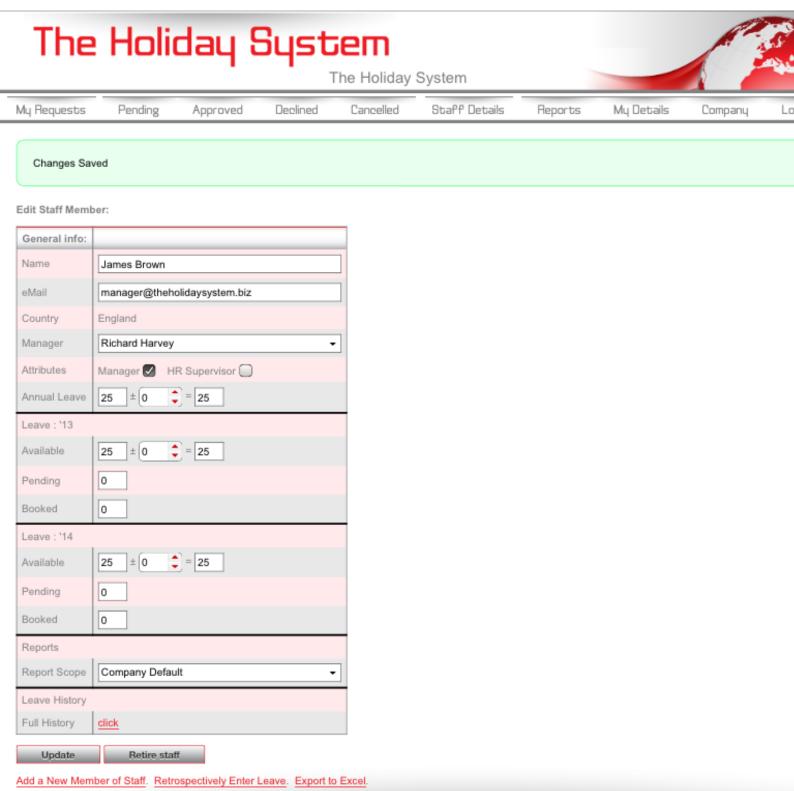
Company

Cancelled

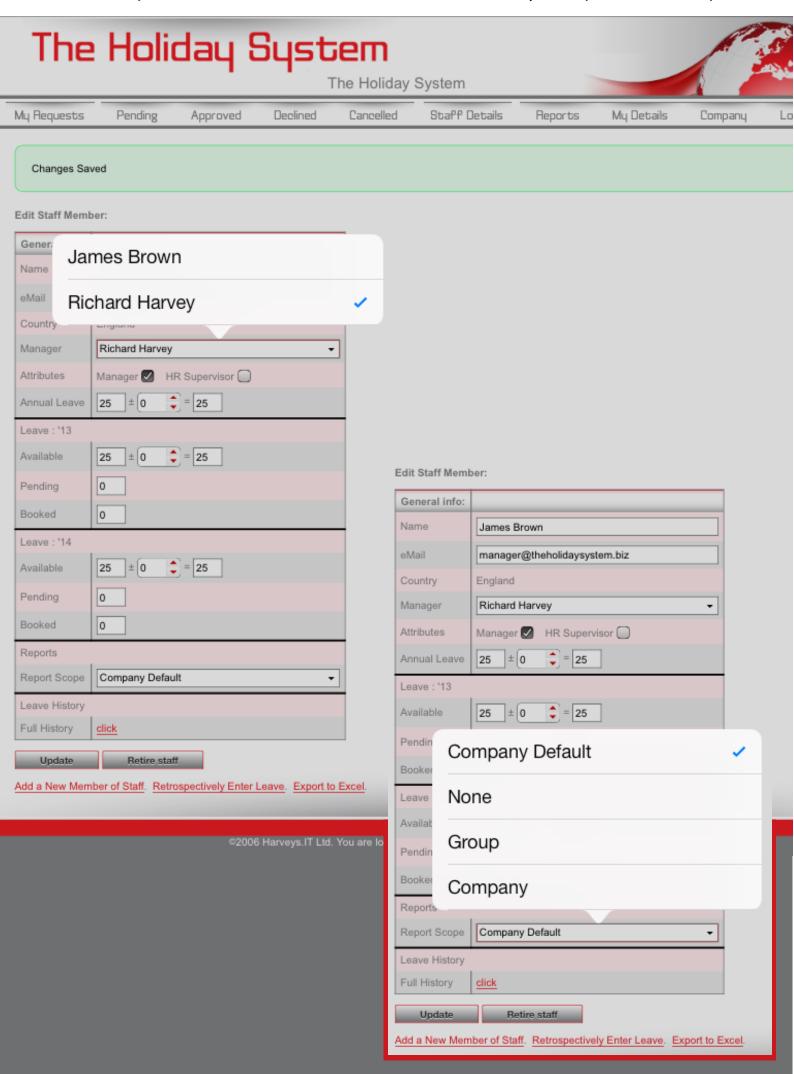
Edit Staff Member: General info: Name James Brown eMail manager@theholidaysystem.biz Country England Manager Richard Harvey Attributes HR Supervisor Manager . 25 ± 0 Annual Leave Leave: '13 25 Available 25 ± 0 Pending 0 Booked 0 Leave : '14 = 25 ± 0 Available 25 0 Pending Booked 0 Reports Report Scope Company Default Leave History Full History click Update Retire staff

Add a New Member of Staff. Retrospectively Enter Leave. Export to Excel.

When you update a record, you will get a green banner that says "changes saved" this is your confirmation the action has worked correctly.



Some of the options are a selection list. Choose the information you require and then update.



### Step 4

'13 Leave

Create

Now create your next member of staff. You will be able to choose the manager they report to. This can be changed at a later date if required.



You can also choose if the user gets a weekly report showing who in their group is on holiday over the next 4 weeks.

### The Holiday System

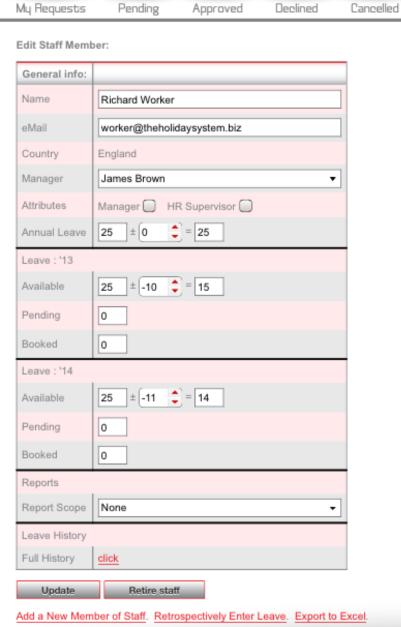
The Holiday System

Staff Details

Reports

My Details

Company



If you amend a users holiday entitlement it is shown in the reports as an audit trail.

### The Holiday System

The Holiday System



#### Leave Status

Leave Available (*13)	15	Leave Pending Approval ('13)	0
Leave Available ('14)	14	Leave Pending Approval ('14)	0

#### Your Booking Requests

Applied ▼	From	То	Leave	User Comment	Auth Comment
30/10/13	30/10/13	30/10/13	0 Days	Adjustment Made	User 782 "Richard Harvey". Anual Leave: 0 day Year: -10 days, Next Year:-11 days.

Amend Staff Member Add a New Member of Staff Retrospectively Enter Leave

The holiday system comes free of charge with 4 users to allow you to test. You will always get 4 free users in the future, you only pay for additional users. If you exceed the 4 users, you will be asked to upgrade the system and pay for the additional users.

### The Holiday System

Approved

Declined

The Holiday System

Cancelled



New Staff Member

Pending

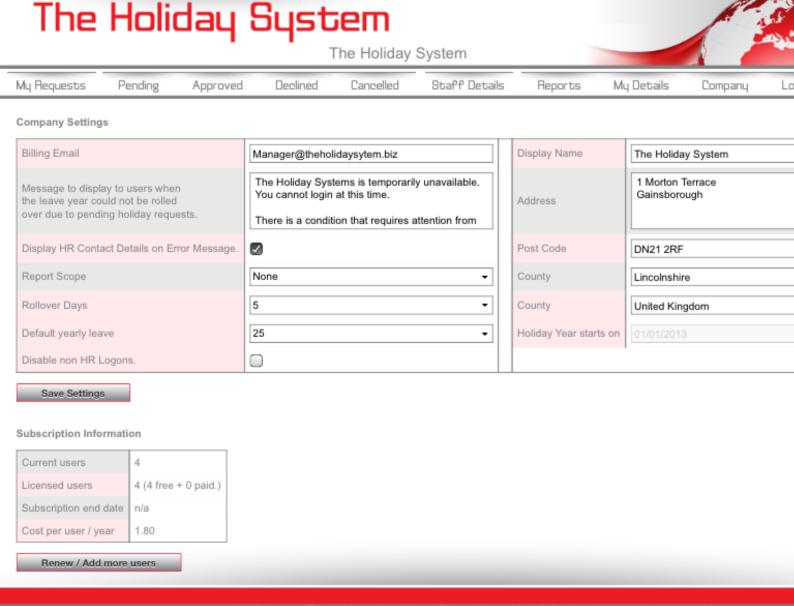
My Requests

You cannot add any more users because you have reached your licensed limit. Please go to the company section and add / upgrade your subscription. If you have retired a mem can delete them to re-use their license.

Staff Details

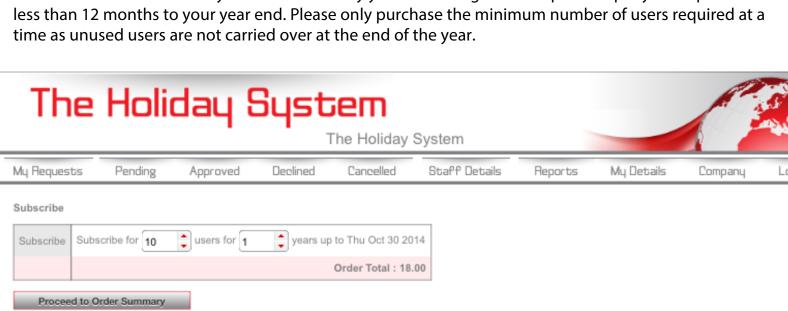
Reports

To add more users, go to the company tab. Here will be shown all your company details. Choose "Renew / Add more users"



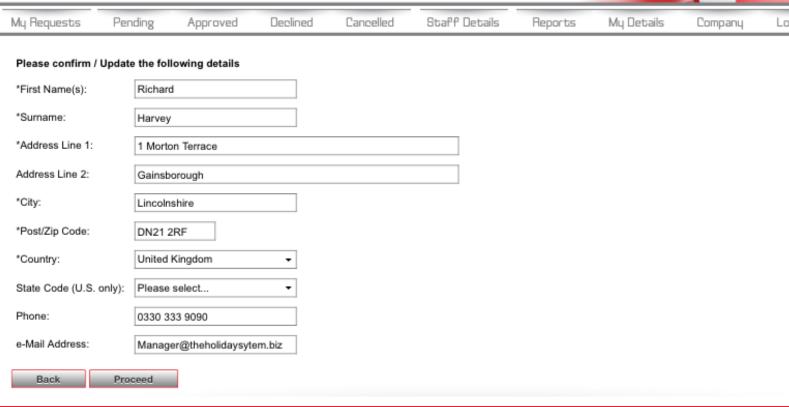
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You will then get the option of how many users you wish to add, these are purchased in block of 5 and are calculated to the end of your current holiday year. The charge is £1.80 per user per year or pro rata if



### The Holiday System

The Holiday System



#### And the amount that is due to be paid

### The Holiday System

The Holiday System

My Requests Pending Approved Declined Cancelled Staff Details Reports My Details Company L

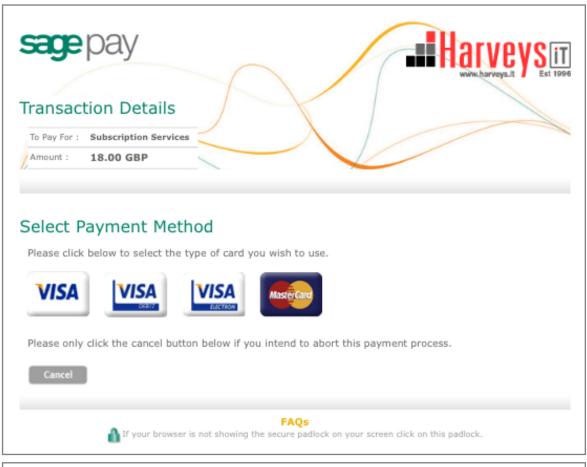
#### Order Confirmation Page

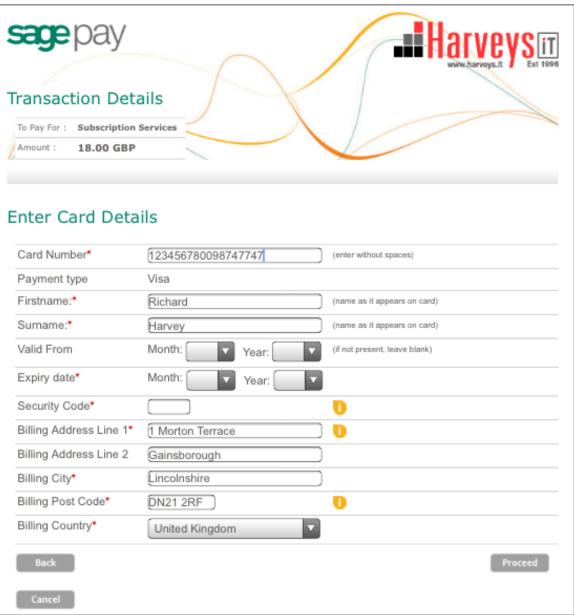
Your Basket Contents			
Title	Price	Quantity	Total
Holiday System	0.15 GBP	120	18.00 GBP
		Total:	18.00 GBP

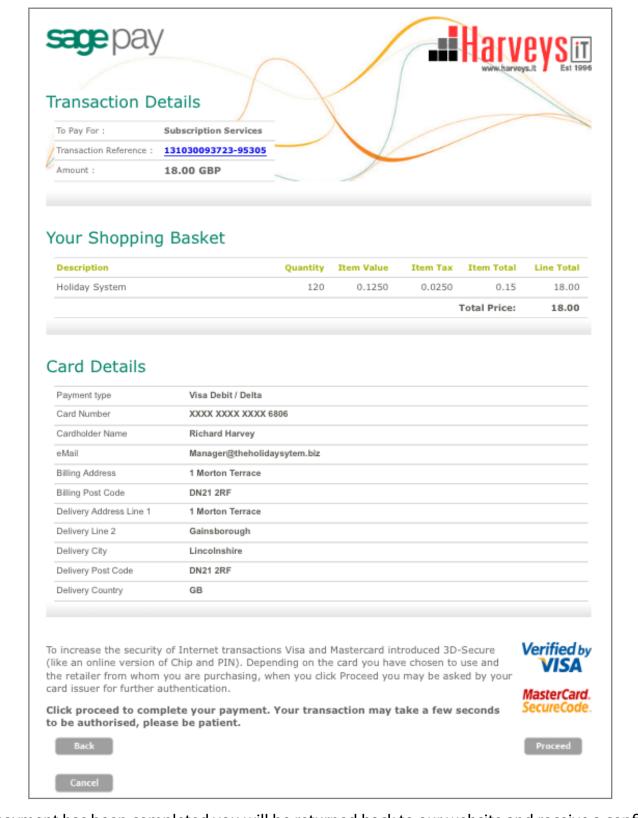
Your Billing Details					
Customer Name:	The Holiday System				
Name:	Richard Harvey				
Address Details:	1 Morton Terrace Gainsborough Lincolnshire DN21 2RF United Kingdom				
Phone Number:	0330 333 9090				
e-Mail Address:	Manager@theholidaysytem.biz				

Back Proceed

#### You will then be taken to the SagePay secure payments system







When payment has been completed you will be returned back to our website and receive a confirmation.

### The Holiday System

The Holiday System

My Requests Pending Approved Declined Cancelled Staff Details Reports My Details Company L

#### Your order has been Successful

The transaction has completed successfully.

The order number, for your reference is: 131030093723-95305

You quote this in all correspondence with us.

Home

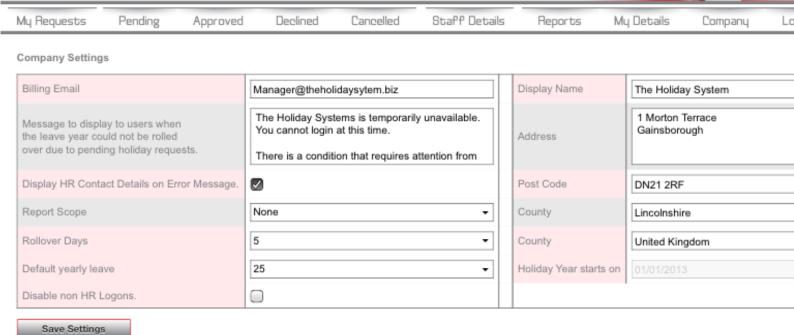
In the company section you will be able to see the payment transaction you have made. You will also see any past transactions. If a topup event failed, this will show as an aborted transaction.

All credit card details are managed by SAGEPAY a PCI compliant system.

We never see your card details, so you can be assured the system is safe and secure.

### The Holiday System





#### Subscription Information

Current users	4
Licensed users	14 (4 free + 10 paid.)
Subscription end date	30/10/2014
Cost per user / year	1.80

Renew / Add more users

#### Payment History

Date	Reference	Qty	Rate	Amount	Payment	Fulfilled	Paid Users	Expiration Date
30/10/2013 09:37:00	131030093631-29020	120	0.15	18	ABORT	NO	0	n/a
30/10/2013 09:37:00	131030093723-95305	120	0.15	18	ОК	YES	10	30/10/2014

#### Staff Leaving / Retiring

When a member of staff leaves the company you can retire them.

#### This is a one way action and cannot be undone. The Holiday System The Holiday System Pending My Requests Approved Declined Cancelled Staff Details Reports My Details Company Edit Staff Member: General info: Name Mr retired eMail retired@theholidaysystem.biz Country England James Brown Manager Attributes Manager ... HR Supervisor ± 0 = 25 Annual Leave Leave: '13 **2**5 Available ± 0 25 Edit Staff Member: Pending General info: Booked 0 Name Mr retired Leave: '14 retired@theholidaysystem.biz Available 25 ± 0 = 25 England Pending 0 Manager James Brown Booked 0 Manager \_\_\_ HR Supervisor Reports 25 = 25 Report Scope Company Default Leave: '13 http:// Leave History = 25 www.theholidaysystem.biz Full History Are you sure you want to remove this 0 Retire staff Update member of staff? Booked 0 Add a New Member of Staff. Retrospectively Enter THIS IS PERMANENT! Leave: '14 25 ± 0 = 25 Cancel OK Pending 0 0 Company Default Report Scope Leave History Full History click

Update

Retire staff

Add a New Member of Staff. Retrospectively Enter Leave. Export to Excel.

Retired staff are greyed out in the list, you can still view their details, but not make any changes.

### The Holiday System

Approved

Declined

The Holiday System

Cancelled

Staff Details



Search: Search

Pending

Staff Overview

My Requests

	this year			next year			
Employee ▲	Available Pending Taken			Available	Pending	Taken	
James Brown	25	0	0	25	0	0	⊠
Mr retired	25	0	0	25	0	0	⊠
Richard Harvey	25	0	0	25	0	0	⊠
Richard Worker	15	0	0	14	0	0	⊠

Manage Retired Staff Add a New Member of Staff Heirachy Export List Staff Leave Report

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Retired staff are still counted in your user count. Once you are happy you can delete the Member of staff and recover their user license. This is a permanent none reversible function, all data relating to this member of staff will be removed. There is no backup of their data in any way. You are recommended to export the staff's history before you delete them.

#### The Holiday System The Holiday System Pending My Requests Approved Declined Cancelled Staff Details Reports My Details Company Search: Search Staff Overview this year next year

Manage active

Mr retired

Employee ▲

Available

Pending

Taken

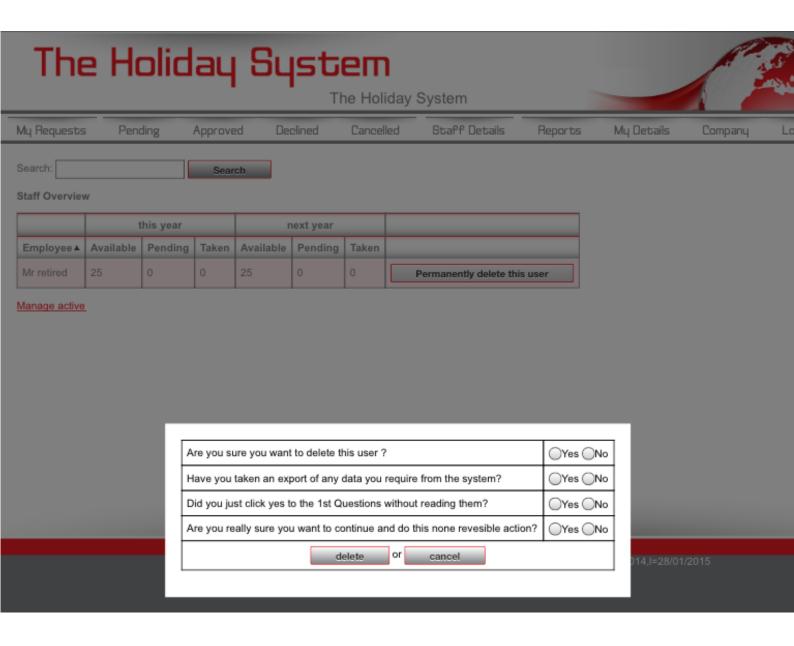
Available

Pending

Taken

Permanently delete this user

You will be asked 4 questions when you try and delete a member of staff, you must answer these correctly to proceed.





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