

Installation Guide

The Holiday System



Step 1

Signup to the holiday system at www.theholidaysystem.biz/signup
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 communications 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 [here](#) to have your password sent to your email address .

Email:

Password:

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

The Holiday System

The Holiday System

My Requests

Pending

Approved

Declined

Cancelled

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Your leave status

Leave Available ('13)	25	Leave Pending Approval ('13)	0
Leave Available ('14)	25	Leave Pending Approval ('14)	0

Your Booking Requests

Applied ▼	From	To	Leave	Comment	
-----------	------	----	-------	---------	--

[Book a New Holiday](#) or [Book a ½ Day](#).

©2006 Harveys.IT Ltd. You are logged in as 'Richard Harvey'. c=1,f=4,p=0,e=01/01/1900,l=01/04/1900

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 uses 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.

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Search:

Staff Overview

Employee ▲	this year			next year			
	Available	Pending	Taken	Available	Pending	Taken	
Richard Harvey	25	0	0	25	0	0	

[Manage Retired Staff](#) [Add a New Member of Staff](#) [Heirachy](#) [Export List](#) [Staff Leave Report](#)

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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.

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New Staff Member

Name	<input type="text" value="James Brown"/>
eMail	<input type="text" value="Manager@theholidaysyste"/>
Country	<div>England</div>
Manager	<div>Richard Harvey</div>
'13 Leave	<input type="text" value="25"/>

Create

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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 Managers first.

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Edit Staff Member:

General info:	
Name	James Brown
eMail	manager@theholidaysystem.biz
Country	England
Manager	Richard Harvey ▼
Attributes	Manager <input type="checkbox"/> HR Supervisor <input type="checkbox"/>
Annual Leave	25 ± 0 = 25
Leave : '13	
Available	25 ± 0 = 25
Pending	0
Booked	0
Leave : '14	
Available	25 ± 0 = 25
Pending	0
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.

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Changes Saved

Edit Staff Member:

General info:	
Name	<input type="text" value="James Brown"/>
eMail	<input type="text" value="manager@theholidaysystem.biz"/>
Country	<input type="text" value="England"/>
Manager	<input type="text" value="Richard Harvey"/>
Attributes	Manager <input checked="" type="checkbox"/> HR Supervisor <input type="checkbox"/>
Annual Leave	<input type="text" value="25"/> ± <input type="text" value="0"/> = <input type="text" value="25"/>
Leave : '13	
Available	<input type="text" value="25"/> ± <input type="text" value="0"/> = <input type="text" value="25"/>
Pending	<input type="text" value="0"/>
Booked	<input type="text" value="0"/>
Leave : '14	
Available	<input type="text" value="25"/> ± <input type="text" value="0"/> = <input type="text" value="25"/>
Pending	<input type="text" value="0"/>
Booked	<input type="text" value="0"/>
Reports	
Report Scope	<input type="text" value="Company Default"/>
Leave History	
Full History	click

Update

Retire staff

[Add a New Member of Staff.](#) [Retrospectively Enter Leave.](#) [Export to Excel.](#)

Step 4

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.

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New Staff Member

Name	<input type="text" value="Richard Worker"/>
eMail	<input type="text" value="Worker@theholidaysystem"/>
Country	<input type="text" value="England"/>
Manager	<input type="text" value="James Brown"/>
'13 Leave	<input type="text" value="25"/>

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

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Edit Staff Member:

General info:	
Name	<input type="text" value="Richard Worker"/>
eMail	<input type="text" value="worker@theholidaysystem.biz"/>
Country	<input type="text" value="England"/>
Manager	<input type="text" value="James Brown"/>
Attributes	Manager <input type="checkbox"/> HR Supervisor <input type="checkbox"/>
Annual Leave	<input type="text" value="25"/> ± <input type="text" value="0"/> = <input type="text" value="25"/>
Leave : '13	
Available	<input type="text" value="25"/> ± <input type="text" value="-10"/> = <input type="text" value="15"/>
Pending	<input type="text" value="0"/>
Booked	<input type="text" value="0"/>
Leave : '14	
Available	<input type="text" value="25"/> ± <input type="text" value="-11"/> = <input type="text" value="14"/>
Pending	<input type="text" value="0"/>
Booked	<input type="text" value="0"/>
Reports	
Report Scope	<input type="text" value="None"/>
Leave History	
Full History	click

Update

Retire staff

[Add a New Member of Staff.](#) [Retrospectively Enter Leave.](#) [Export to Excel.](#)

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

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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	To	Leave	User Comment	Auth Comment
30/10/13	30/10/13	30/10/13	0 Days	Adjustment Made	User 782 "Richard Harvey". Annual Leave: 0 days 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.

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New Staff Member

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 member you can delete them to re-use their license.

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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Company Settings

Billing Email

Manager@theholidaysystem.biz

Message to display to users when the leave year could not be rolled over due to pending holiday requests.

The Holiday Systems is temporarily unavailable. You cannot login at this time.
There is a condition that requires attention from

Display HR Contact Details on Error Message.

☒

Report Scope

None

Rollover Days

5

Default yearly leave

25

Disable non HR Logons.

☐

Display Name

The Holiday System

Address

1 Morton Terrace
Gainsborough

Post Code

DN21 2RF

County

Lincolnshire

County

United Kingdom

Holiday Year starts on

01/01/2013

Save Settings

Subscription Information

Current users

4

Licensed users

4 (4 free + 0 paid.)

Subscription end date

n/a

Cost per user / year

1.80

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 less than 12 months to your year end. Please only purchase the minimum number of users required at a time as unused users are not carried over at the end of the year.

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Subscribe

Subscribe

Subscribe for 10 users for 1 years up to Thu Oct 30 2014

Order Total : 18.00

Proceed to Order Summary

You will be asked to confirm your company information

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The Holiday System

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Please confirm / Update the following details

*First Name(s):

*Surname:

*Address Line 1:

Address Line 2:

*City:

*Post/Zip Code:

*Country:

State Code (U.S. only):

Phone:

e-Mail Address:

Back

Proceed

And the amount that is due to be paid

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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@theholidaysystem.biz

Back

Proceed

You will then be taken to the SagePay secure payments system







Transaction Details

To Pay For :	Subscription Services
Amount :	18.00 GBP

Select Payment Method


Please click below to select the type of card you wish to use.





Please only click the cancel button below if you intend to abort this payment process.

[Cancel](#)

[FAQs](#)




 If your browser is not showing the secure padlock on your screen click on this padlock.



Transaction Details

To Pay For :	Subscription Services
Amount :	18.00 GBP

Enter Card Details

Card Number*	<input type="text" value="123456780098747747"/>	(enter without spaces)	
Payment type	Visa		
Firstname:*	<input type="text" value="Richard"/>	(name as it appears on card)	
Surname:*	<input type="text" value="Harvey"/>	(name as it appears on card)	
Valid From	Month: <input type="text" value=""/>	Year: <input type="text" value=""/>	(if not present, leave blank)
Expiry date*	Month: <input type="text" value=""/>	Year: <input type="text" value=""/>	
Security Code*	<input type="text" value=""/>		
Billing Address Line 1*	<input type="text" value="1 Morton Terrace"/>		
Billing Address Line 2	<input type="text" value="Gainsborough"/>		
Billing City*	<input type="text" value="Lincolnshire"/>		
Billing Post Code*	<input type="text" value="DN21 2RF"/>		
Billing Country*	<input type="text" value="United Kingdom"/>		

[Back](#)[Proceed](#)

[Cancel](#)

Transaction Details

To Pay For : **Subscription Services**

Transaction Reference : **131030093723-95305**

Amount : **18.00 GBP**

Your Shopping Basket

Description	Quantity	Item Value	Item Tax	Item Total	Line Total
Holiday System	120	0.1250	0.0250	0.15	18.00
Total Price:					18.00

Card Details

Payment type	Visa Debit / Delta
Card Number	XXXX XXXX XXXX 6806
Cardholder Name	Richard Harvey
eMail	Manager@theholidaysystem.biz
Billing Address	1 Morton Terrace
Billing Post Code	DN21 2RF
Delivery Address Line 1	1 Morton Terrace
Delivery Line 2	Gainsborough
Delivery City	Lincolnshire
Delivery Post Code	DN21 2RF
Delivery Country	GB

To increase the security of Internet transactions Visa and Mastercard introduced 3D-Secure (like an online version of Chip and PIN). Depending on the card you have chosen to use and the retailer from whom you are purchasing, when you click Proceed you may be asked by your card issuer for further authentication.

Click proceed to complete your payment. Your transaction may take a few seconds to be authorised, please be patient.

[Back](#)Verified by
VISAMasterCard.
SecureCode.[Proceed](#)[Cancel](#)

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

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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.

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Company Settings

Billing Email	Manager@theholidaysystem.biz	Display Name	The Holiday System
Message to display to users when the leave year could not be rolled over due to pending holiday requests.	The Holiday Systems is temporarily unavailable. You cannot login at this time. There is a condition that requires attention from	Address	1 Morton Terrace Gainsborough
Display HR Contact Details on Error Message.	<input checked="" type="checkbox"/>	Post Code	DN21 2RF
Report Scope	None	County	Lincolnshire
Rollover Days	5	County	United Kingdom
Default yearly leave	25	Holiday Year starts on	01/01/2013
Disable non HR Logons.	<input type="checkbox"/>		

Save Settings

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	OK	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

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Edit Staff Member:

General info:	
Name	Mr retired
eMail	retired@theholidaysystem.biz
Country	England
Manager	James Brown
Attributes	Manager <input type="checkbox"/> HR Supervisor <input type="checkbox"/>
Annual Leave	25 ± 0 = 25
Leave : '13	
Available	25 ± 0 = 25
Pending	0
Booked	0
Leave : '14	
Available	25 ± 0 = 25
Pending	0
Booked	0
Reports	
Report Scope	Company Default
Leave History	
Full History	click
<div>UpdateRetire staff</div>	

[Add a New Member of Staff.](#) [Retrospectively Enter](#)

Edit Staff Member:

General info:	
Name	Mr retired
eMail	retired@theholidaysystem.biz
Country	England
Manager	James Brown
Attributes	Manager <input type="checkbox"/> HR Supervisor <input type="checkbox"/>
Annual Leave	25 ± 0 = 25
Leave : '13	
Available	25 ± 0 = 25
Pending	0
Booked	0
Leave : '14	
Available	25 ± 0 = 25
Pending	0
Booked	0
Reports	
Report Scope	Company Default
Leave History	
Full History	click
<div>UpdateRetire staff</div>	

<http://www.theholidaysystem.biz>

Are you sure you want to remove this member of staff?

THIS IS PERMANENT!

CancelOK

[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.

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Search:

Search

Staff Overview

	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.

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Staff Overview

	this year			next year			
Employee ▲	Available	Pending	Taken	Available	Pending	Taken	
Mr retired	25	0	0	25	0	0	<div>Permanently delete this user</div>

[Manage active](#)

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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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Search:

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Staff Overview

	this year			next year			
Employee ▲	Available	Pending	Taken	Available	Pending	Taken	
Mr retired	25	0	0	25	0	0	<div>Permanently delete this user</div>

[Manage active](#)

Are you sure you want to delete this user ?

☐ Yes ☐ No

Have you taken an export of any data you require from the system?

☐ Yes ☐ No

Did you just click yes to the 1st Questions without reading them?

☐ Yes ☐ No

Are you really sure you want to continue and do this none reversible action?

☐ Yes ☐ No

delete

or

cancel

014,l=28/01/2015

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Search:

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Staff Overview

	this year			next year			
Employee ▲	Available	Pending	Taken	Available	Pending	Taken	

[Manage active](#)

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For instructions on how to approve and manage holiday requests, please see the Managers Guide or User Guide.