Human Resources Annual Leave

Note: In versions for Access 2002 and 2003, the calendar does not exist in the system. It is advisable to manually enter dates.

MAIN MENU

Upon loading the system, you will be taken to the main menu.
At this screen you are able to navigate to the various functions of the system such as 'Annual Leave' or adjustments.

The Options at this screen are:

1.   Annual Leave

2.   Update Information

3.   Quit

Before proceeding it is advised to go to the 'Update information' option. From here you can set the parameters which will be used throughout the system such as title, and annual leave type, job title, number of days allowed for year and line manager.
These parameters are needed when entering the main annual leave details.
Please see the end of the document on how to do this.

Annual Leave

This screen contains information on the annual leave that you record.

Adding a new annual leave record

1. The system comes with a default name which you can simply overwrite. Enter your first and last name in the boxes.
2. Select your job title from the drop down box. If you do not see your job title you can add it by going to the main menu and selecting the 'Update Information' option. Then select 'job title'.
3. Select your section you work in from the drop down box. If you do not see your section you can add it by going to the main menu and selecting the 'Update Information' option. Then select 'section'.
4. In the grid click on the date cell. From here you can enter the date of the start and end of the annual leave period you are requesting. The total number of days you are taking is then automatically calculated and displayed in the box named 'Num of days'.
5. Select your type of leave from the drop down box. If you do not see your type of leave you can add it by going to the main menu and selecting the 'Update Information' option. Then select 'Annual leave type'.
6. Select your line manager from the drop down box. If you do not see your line manager you can add it by going to the main menu and selecting the 'Update Information' option. Then select 'line manager'.
7. The box named 'Approved' can be filled in at any time if you get approval for the annual leave you have requested.
8. Add any detail notes in the box named 'Notes'.

Printing the annual leave period
1. At the bottom of the screen are two date boxes. Enter a 'date to' and 'date from' into each box to define the leave period you wish to print..
2. When you have entered the dates click the button labelled 'Print'.

Emailing an annual leave request

Note: You must have MS Outlook installed for the email function to work.

1. At the bottom of the screen click the button labelled 'Email'.
2. At the email screen select your leave period from the drop down box. The message details will then be filled in. If you do not see your leave period listed it is most probably because you did not fill in all details in the annual leave grid on the main form. Type of leave and line manager should be selected in the grid.
3. If you are happy with the message then click the button labelled 'Send now'.

Each time you load the main annual leave form you will see the indicators for remaining days and also a visual update of the pie chart showing a breakdown of the type of leave taken.

Updating System Information

This option allows you to set parameters which are used throughout the system. For example you can set details for the annual leave type, job title, number of days allowed for year and line manager

1. From the main menu click the button labelled Update Information'. You will be taken to another menu.
2. Select an update button
3. **Note**: It is advisable not to delete entries for leave type and line manager. Doing so would remove any entries holding these values in the main annual leave grid.

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