

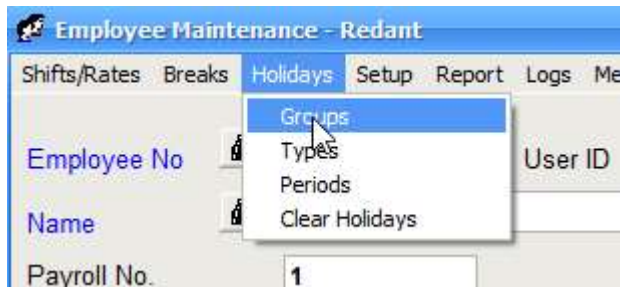
Holiday Bookings

Setup

This help document assumes you are already running the shop floor system, if not then talk to support to get training on this module.

Open up the Employee module from Main Menu > Modules > Maintenance > Employees

From the top menu select the following



This is where we setup the groups. Each employee must belong to a specific group. The group will apply a series of checks before a holiday is booked. Each group can have its own holiday calendar as well as a category (colour)

Group No	Description	Maximum	Period of Leave	Period of Notice	Period of Leave	Period of Notice	Email	Minimum Hrs	Ca
1	Milling	2	1	5	5	10	support@redantsoftware.co.uk	2	hol
2	Turning	1	1	5	5	10	support@redantsoftware.co.uk	4	hol
3	Staff	2	1	5	5	10		8.5	hol
4	Management	1	1	5	5	10		8.5	hol
*									

The Group No column is automatically generated by Redant and cannot be changed. Enter a Description for the group followed by the following:

Maximum – this is the maximum no. of employees in the group allowed on holiday at any one time. This will not apply to bank holiday or company shutdown as these entries are made within Redant and not the shop floor.

Period Of Leave – there are higher and lower levels which determine the notice required depending on the consecutive days book at the same time. In the example above anyone booking between 1 and 4 days will require a notice period of 5 days. Over 5 days then the notice period is 10.

Email

Enter one or more email addresses for each group. The email address will be used to notify a member of staff that a holiday has been provisionally booked. If there is more than one email address per group then separate each email with a ; (semi-colon)

Minimum Hours

This is the minimum hours an employee can book a holiday for. If there is no restriction then set it to 0

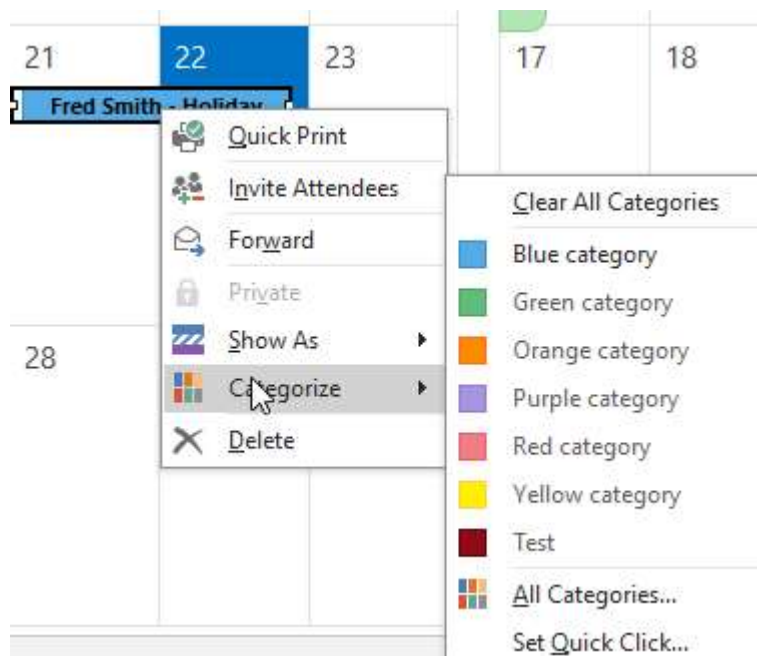
Calendar Name

Enter the email address of the Outlook shared calendar (see separate document on how to setup an outlook calendar) Use the 'Calendar Test' button to verify the calendar is working. A test entry will be added to the specified calendar with today's date.

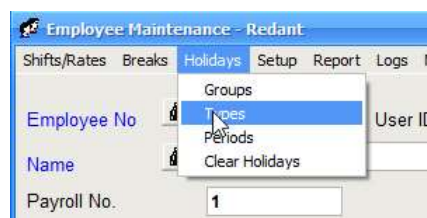
All users who are involved in anything to do with the employee holiday bookings must have the Outlook calendar available. Failure to check this will stop any calendar entries being made or amended. The easiest way to do this is to go to each user's computer and perform the 'Calendar Test' action to verify everything work ok.

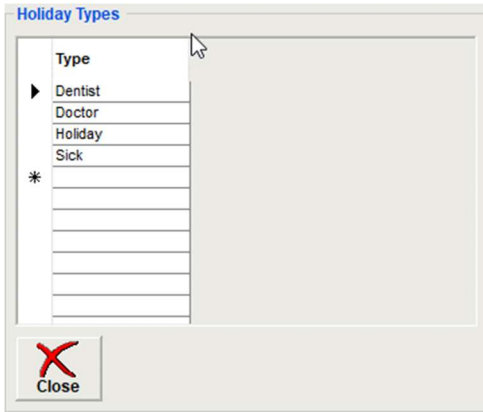
Calendar Category

Calendar entries can be put in to different categories and shown in different colours. To see a list of calendar categories, open up the outlook calendar and right click an entry and select Categories. Here you will see a list of default entries and their colours. You can add you own categories and specify any colour you wish. The category name must be entered exactly the same as shown in outlook.



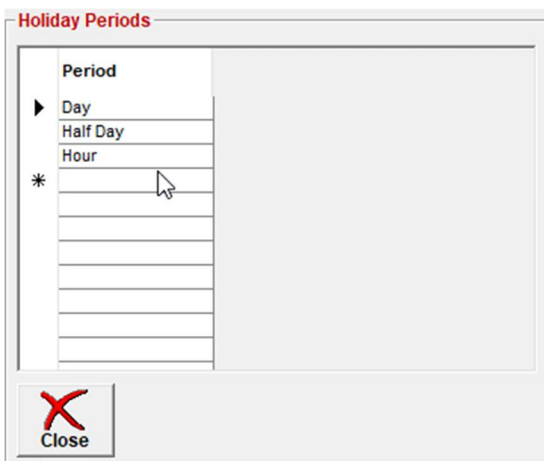
From the top menu select the following:





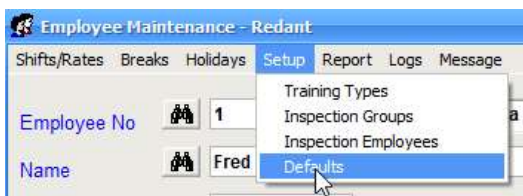
Enter the Types of absence for reference on the wages report and displays. All entries here can be used for holiday payments.

Select the following from the top menu:



There are only three entries required here as shown above – remove all other entries as redant will ignore them.

Select the following from the top menu:



The screenshot shows a dialog box titled "Defaults". It contains two text input fields: "Holiday Year Start" with the value "February" and "Holiday Year End" with the value "January". Below these fields is an "Ok" button. A mouse cursor is positioned over the "Ok" button.

Enter your holiday month start and end followed by OK to save

Clear Holidays

This option is used to clear out old holiday entries from the employee's record

The screenshot shows the "Employee Maintenance - Redant" application window. The "Holidays" tab is selected, and a context menu is open over the "Clear Holidays" option. Below this, a separate dialog box titled "Clear Holidays" is shown, featuring a spinner control set to "365" and the label "Days". It includes "OK" and "Cancel" buttons. A mouse cursor is pointing at the "OK" button.

Use with caution as the records cannot be recovered only from a company backup/restore

Shifts

From the top menu select Shifts



Holiday Hours (day)	8.5	8.5	8.5	8.5	5
Holiday Hours AM	5	5	5	5	5
Holiday Hours PM	3.5	3.5	3.5	3.5	0

Enter the holiday hours for each day. These will be specific to your company. Remember you can have several shifts available. To change to a different shift, select it from the shift no. dropdown at the top of the window.

Employee Records

For each employee enter the following details:

Employee Maintenance - Redant
Shifts/Rates Breaks Holidays Setup Report Logs Message

Employee No: 1 User ID: admin Start Date: 18/03/2004 Finish Date: 18/03/2004
 Name: Fred Smith Active:
 Payroll No: 1 Position: Shop Manager
 Pin Number: 0 (Enter 0 to disable) Basic Rate: 0
 Department: Department Maximum Jobs: 4 Crew Member:
 Shift No: 1 Holiday Group: 1 Pay Holidays:
 Show Holidays as HRS: Days
 Holidays (current): 267.75 Booked: 174.25 Balance: 93.5
 Holidays (next): 267.75 Booked: 0 Balance: 267.75
 Category: Supervisor
 Training Notes:
 Last Clock Type: BF Clock Date/Time: 14/07/2023

Job No	Op No	Wk Centre	Start Date/Time

Buttons: ? Edit New Back Forward Holidays / Absents Training Records Erase Image

Holidays (current) – this is the total number of hours allowed per holiday year. We have decided to now switch to hours as the base holiday entitlement which fits in better with current working

environments. The Booked and Balance will be calculated by redant based on the holidays hrs taken in this and the next holiday periods.

You can however view the holidays as 'Days' by selecting the radio button 'Days'. Select the radio button 'Hours' will revert it back. This is not a permanent option and will always revert back to hours. This option is also available in the Data Collection module for the employee.

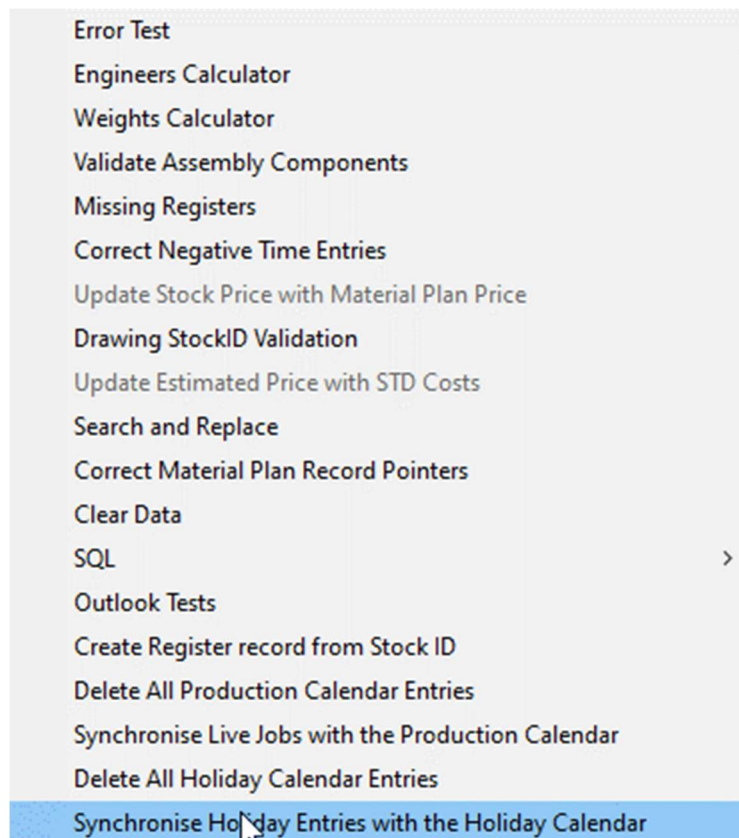
Holidays (next) – this is the same as above but for the next holiday year. It can be different due to length of employment etc.

Holiday Group – select the appropriate group from the list setup previously. Each employee must belong to a valid group to enable them to book holidays.

Applying Existing Holiday Entries to the Outlook Calendar

If you have existing holiday entries for your employees then these can be added to the Outlook holiday calendar.

From the Main Menu select Utilities>Synchronise Holiday Entries with the Holiday Calendar. You will need to be signed in as the Redant Admin user to perform this action.




This procedure will check the calendar for an existing employee holiday entry and if not found, it will create a new one.

There is also an option under Main Menu > Utilities to 'Delete All Holiday Calendar Entries' if you want to start from scratch. **USE WITH CAUTION** and this cannot be undone.

Manual Holiday Bookings / Changes



For any employee select the  button.

Type	Period	HRS	AM/PM	Date From	Date To	T&A	Notes	Provisional
▶ Holiday	Hour	8.5		21/09/2023	21/09/2023	<input type="checkbox"/>	Created By Employee	<input checked="" type="checkbox"/>
Holiday	Hour	8.5		14/09/2023	14/09/2023	<input type="checkbox"/>	Created By Employee	<input checked="" type="checkbox"/>
Holiday	Day	8.5		28/08/2023	28/08/2023	<input type="checkbox"/>	August bank Holiday	<input type="checkbox"/>
Holiday	Day	30.5		22/08/2023	25/08/2023	<input type="checkbox"/>	Max On Holiday /	<input checked="" type="checkbox"/>
Holiday	Day	17		21/08/2023	22/08/2023	<input type="checkbox"/>	Created By Employee	<input checked="" type="checkbox"/>
Holiday	Day	8.5		18/08/2023	18/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	39		14/08/2023	18/08/2023	<input type="checkbox"/>	Created By Employee	<input type="checkbox"/>
Holiday	Hour	8.5		10/08/2023	10/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Hour	5	am	01/08/2023	01/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Hour	5.5	am	31/07/2023	04/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Hour	5		28/07/2023	28/07/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	8.5		27/07/2023	27/07/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	8.5		25/07/2023	25/07/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	25.5		24/07/2023	26/07/2023	<input type="checkbox"/>	Max On Holiday / Insufficient Notice	<input checked="" type="checkbox"/>
*						<input type="checkbox"/>		<input type="checkbox"/>

Holiday Shift No.

 Start Employee
 End Employee

The following window shows all holiday and absent records on file for the selected employee with the newest entries at the top.

If the entry is shown with 'Provisional' checked then this would have normally been created by the employee using the shop floor booking system and it is awaiting approval. To approve the holiday then simply uncheck the column. A message window will appear asking if you want to notify the employee – if the answer is Yes then the employee will receive a message telling them that the holiday has been approved the next time the shop floor system is used. The system will also make a calendar entry if you have Outlook Calendar integration applied.

The T&A check denotes that the holiday entry has been entered on to the time and attendance records. Removing this will allow it to be inserted again in case of a previous error or removal of the records.

To make a manual entry click in the Type column on an empty line in the grid. Select from the types available. If you are booking one or more whole days then select Day as the period. If you enter the start and end dates next before entering the hours the system will calculate the hours for you and populate the column. If you make a mistake, enter a zero in the hours column and select the dates again. This will repopulate the hours again for the new date range. You can of course override the hours especially if they are less than a full day (see later). Enter the total hours for the holiday period if they were not previously calculated from the date input method. Hours cannot be zero. e.g., the hours could be 39.5 if the holiday spanned a week or 8.5 for a single day. The actual entries should be per the shift pattern holiday day entries for the employee that the dates span.

The hours column is a critical entry as the employee's holidays taken and balance are calculated using these figures.

You can leave the AM/PM columns empty if the 'Period' is set to 'Day' and you are booking 1 or more days holiday. Use the notes column to signify what the holiday is e.g., Bank Holiday, Christmas Holiday etc. Select the line above or below to save and create the new record.

If the Outlook Calendar integration has been setup, then an entry will have been created in the calendar spanning the dates selected.

Any changes to an existing record will make the necessary changes in the calendar unless otherwise notified. Deleting an entry will remove it from the calendar also.

To book a holiday which is less than a day enter the 'Period' as 'Half Day', followed by AM or PM. The AM/PM entry is not mandatory but the system will assume AM if nothing is entered. This is also used on the Calendar entry for the employee. The date from and date to must be the same. The system will populate the hours column with AM or PM values from the shift pattern if the column is Zero.


The 'Copy Entry' is used to copy a holiday entry in the grid to the selected range of employees. This is useful for entering Bank Holidays which apply to all employees. Create a holiday entry in the grid or select an existing one you want to copy. Make sure the grid pointer is pointing at the correct entry. Select the start and end employee numbers from the dropdown lists (by default the range shown includes all employees except the one you are looking at) and then select 'Copy Entry'. A message will verify the action and entries will have been entered on to the holiday calendar.

'Insert T&A Record' – (see applying all holidays below for an alternate method) This option will take the selected record from the grid and apply it to the employee's wages clocks. If the date spans several days, then several clocks will be created so as to show as holiday on his record. The T&A check will also be applied to the grid entry once done. **Make sure the 'Holiday Pay Shift' selection is set to the correct shift no. as each holiday pay entry created uses the holiday hrs for each day to apply the new clock entries to the time and attendance.**

'Remove T&A Record' – this has the reverse effect of the above and removes any entries for the holiday selected from the grid.

'Add To Calendar' – this button can be used against a grid record to initially add it to an Outlook Calendar. Useful if this is the first time you have used Outlook Calendars but have existing Holiday records you want to add to the calendar. A check is made to make sure the holiday is not already present in the calendar.



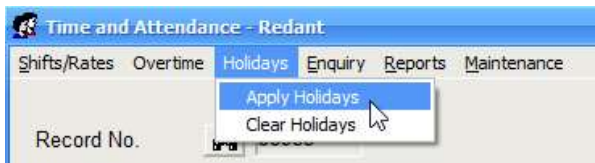
The following button  will show any holiday conflicts for the holiday entry which is selected in the grid. It will be useful if a provisional booking has a note containing the words 'Max On Holiday'. This note is generated from the employee booking system if there is a conflict in a holiday booking and the maximum allowed has been exceeded. The list also includes holiday overlaps which are also counted in the maximum allowed figure.

Applying All Holidays

From the main menu select the following

- Purchase Orders
- Stock
- Calibration
- Time & Attendance**
- Job Time
- Capacity Planning
- Finite Scheduling

From the top menu select:



Holidays / Absences

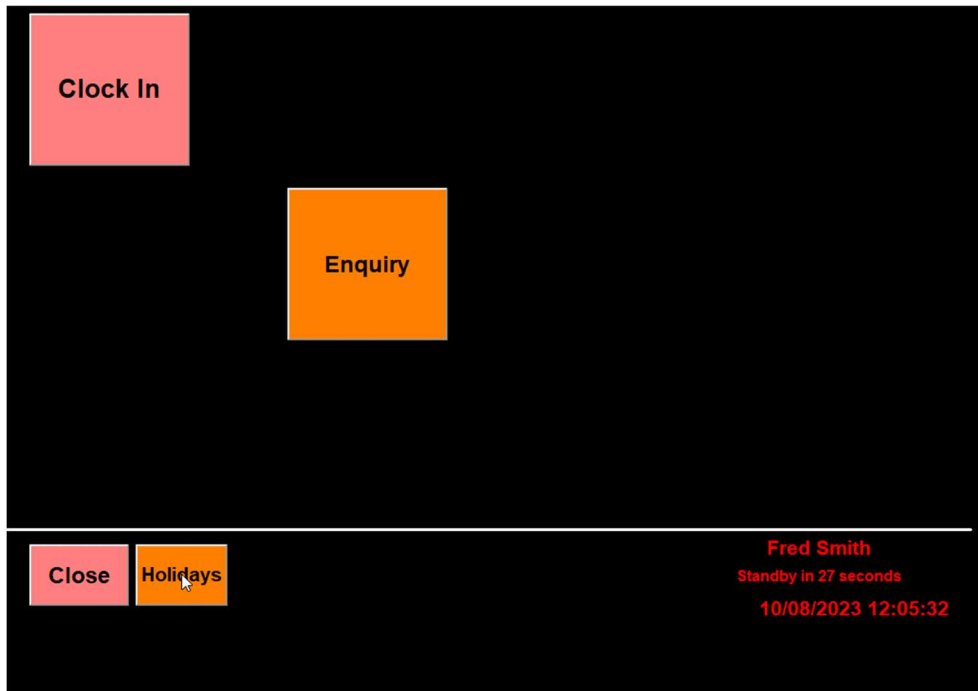
Employee No.	Name	Type	Period	HRS	AM/PM	Date From	Date To	T&A	Notes
2	Tom Jones	Holiday	Day	0		27/06/2023	27/06/2023	<input type="checkbox"/>	
1	Fred Smith	Holiday	Day	8.5		25/07/2023	25/07/2023	<input type="checkbox"/>	
1	Fred Smith	Holiday	Day	8.5		26/07/2023	28/07/2023	<input type="checkbox"/>	
1	Fred Smith	Holiday	Day	8.5		27/07/2023	27/07/2023	<input type="checkbox"/>	
*								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	
								<input type="checkbox"/>	

Listed are all the employee’s holiday records (not provisional) waiting to be applied to the time and attendance. After verifying the entries are correct select ‘Apply Holiday’ followed by ‘Close’

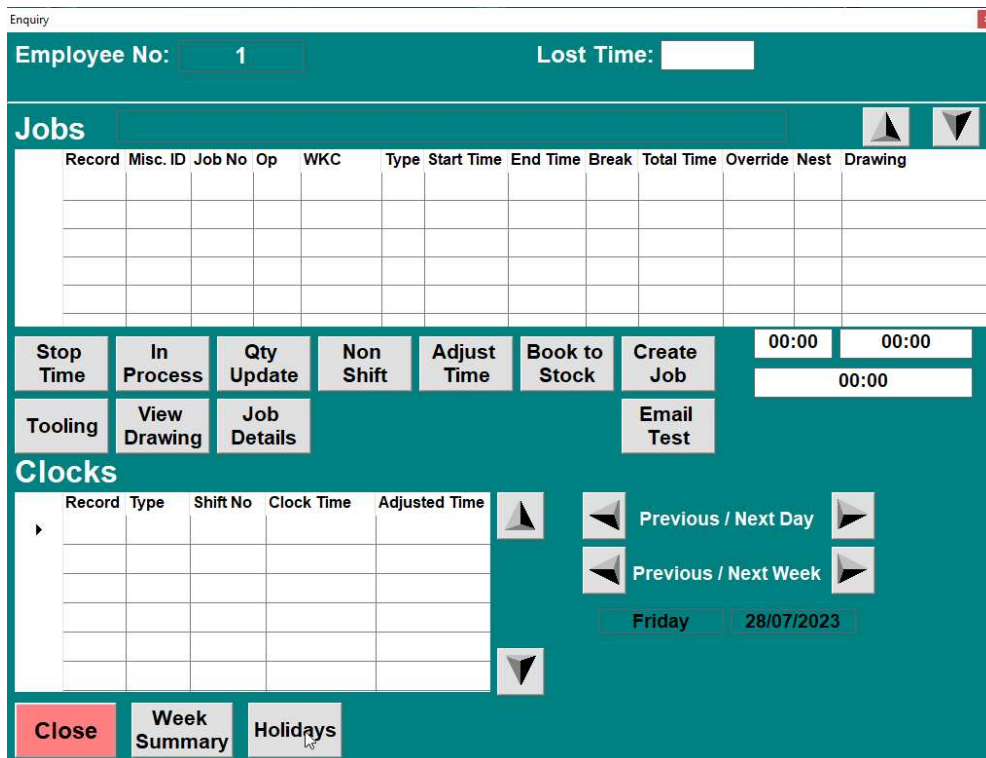
All the relevant clock records have now been created and will appear on the wages reports as Holiday.

Employee Provisional Holiday Booking

The employee holiday records and booking system is available from the main menu form as shown below



or from within the 'Enquiry' form using the 'Holidays' button.



Holidays

Type	Period	HRS	AM/PM	Date From	Date To	Paid	Notes	Provisional
Holiday	Hour	5	PM	30/08/2023	30/08/2023	<input type="checkbox"/>	Created By Employee	<input checked="" type="checkbox"/>
Holiday	Day	8.5		28/08/2023	28/08/2023	<input type="checkbox"/>	August bank Holiday	<input type="checkbox"/>
Holiday	Day	39		14/08/2023	18/08/2023	<input type="checkbox"/>	Created By Employee	<input type="checkbox"/>
Holiday	Hour	8.5		10/08/2023	10/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Hour	5	am	01/08/2023	01/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Hour	5.5	am	31/07/2023	04/08/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	8.5		27/07/2023	27/07/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	8.5		26/07/2023	28/07/2023	<input type="checkbox"/>		<input type="checkbox"/>
Holiday	Day	8.5		25/07/2023	25/07/2023	<input type="checkbox"/>		<input type="checkbox"/>

Holidays (current) Booked Balance
 Holidays (next) Booked Balance

The above screen shot shows all holiday bookings for the employee with details of their initial entitlement, Booked and Balance available for this and the next holiday year.

Holiday Booking Form

Holiday Group:

Max On Holiday: On Holiday:

Holiday Start: Holiday Finish:

Days Booked:

Hours Booked:

Notes:


Warning: Your Provisional Holiday booking may be rejected if either 'On Holiday' or 'Notice Required' are shown in Red

The employees Holiday Group and the group 'Max on Holiday' are shown at the top of the window.

Select the start and end dates for the holiday. The days and hours booked will be calculated when selecting either date from the dropdown calendar. If the required notice period has not been given then this will be displayed as a message in red. If the 'On Holiday' has exceeded the 'Max on Holiday' this will also be shown in red.

Holiday Booking Form

Holiday Group:

Max On Holiday: On Holiday: 

Holiday Start: Holiday Finish:

Days Booked: Notice Required: 5 days

Hours Booked:

Notes:

Q W E R T Y U I O P Delete


A S D F G H J K L

Z X C V B N M \

Space

Book Provisional
Close

Warning: Your Provisional Holiday booking may be rejected if either 'On Holiday' or 'Notice Required' are shown in Red

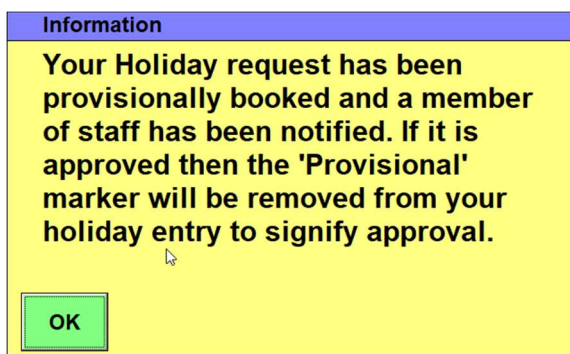
Selecting the  button will display a list of employees who are on holiday within the date range selected. The list also includes holiday 'overlaps' which are also counted in the maximum allowed figure.

A Provisional Booking will be allowed even if the maximum on holiday has been reached or not enough notice has been given however it can be rejected later when it has been reviewed by a staff member. Any rule infringements are notified in the email to office staff and recorded in the 'Notes' column on the previous window.

If the employee wishes to book less than a day (both dates must be the same value) then they can select the AM or PM button. The system will then show either the AM or PM hours for that day from the shift pattern they are on. They can also use the numeric keypad if they wish to change the hours they want to book. They will not be able to book more hours than is available in a day according to what has been set in the shift pattern. The hours entry, AM / PM buttons or the keypad will not be available if more than a day is being booked.

The 'Notes' section can be used to detail any additional information that might be relevant e.g., 'Funeral' or some sort of emergency.

When they are happy with their entry, they can select the 'Book Holiday' button. Further checks are made to validate the data before it is recorded. If successful a message is shown to the employee and an email is sent to the group email address (see previous for setup). They can continue to book more holidays as required.



Any provisional entries will now be shown in their Redant holiday grid.

They will be notified via the messaging system whether the holiday requests have been accepted or rejected.