
TRAINING GUIDE

Level 1 Leave Management

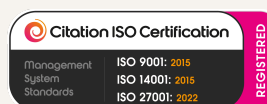
Leave Management: booking and managing absences

Booking, changing and approving leave, checking balances, seeing who is off and handling requests from the app in timeware® HRMS.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1055	1.1

timeware UK Ltd

3 Fieldhouse Road, Rochdale, Greater Manchester, OL12 0AD
+44 (0)1706 659368 · sales@timeware.co.uk · timeware.co.uk



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What this covers

This guide takes you through the everyday leave jobs a manager or administrator does in the web version of timeware HRMS. By the end you will be able to:

- book an absence for someone, change it, delete it, and set its status so it counts
- check how much leave someone has left, and understand each figure
- see who else is off, for one day or a whole month
- deal with leave requests that employees send from the timeware app.

Most of the work happens on two pages. **Leave planner** shows one person's leave year. **Workforce leave** shows everyone who is off in a month.

Why it matters

Leave affects pay, cover and people's plans. If a booking is wrong, or is left at the wrong status, the person's balance will be wrong too. The same figures show in the timeware app, so employees notice quickly.

The most important idea in this guide is simple. **Leave only comes off someone's allowance when its status is Approved (Finalised)**. Anything else is either still waiting, or not happening.

Key terms

You will see these words on screen and throughout this guide.

TERM	WHAT IT MEANS
Absence or leave booking	A record of time someone is away, such as a holiday or a day off sick. The product calls it a leave booking.
Category	The broad kind of leave, for example Holiday or Sickness. Each category has its own allowance.
Reason	The specific type of leave within a category, for example Holiday or Bank Holiday within the Holiday category. The reason sets the booking's colour on the planner.

TERM	WHAT IT MEANS
Allowance	How much leave of one category a person has for the leave year.
Leave year	The period an allowance covers, usually twelve months. It comes from the person's leave policy.
Leave policy	The rules that give a person their leave years and allowances. An administrator sets it up. Leave cannot be booked for someone until they have one.
Status	Where a booking stands, for example Awaiting review or Approved (Finalised). You set it in the booking's Decision group.
Finalised	The last step of a decision. A status ending in (Finalised) is signed off. Only Approved (Finalised) leave comes off the allowance.
Pending	Leave that has been booked or asked for but is not finalised yet. It shows on the planner but does not come off the allowance.
Request	Leave an employee asked for in the timeware app. It arrives as a leave booking with the status Awaiting review.
Rest day	A day the person does not normally work, taken from their work pattern. Rest days inside a booking are usually not taken from the allowance.
Application policy	The set of permissions a user has. It decides which leave pages, buttons and statuses they can use.

Table 1 — Key terms

What permissions are required

Web users need the right switches on their Application policies, under **Configuration > Advanced > Application policies**. Employees using the timeware app need the right boxes ticked on their ESS policy, under **Configuration > People > ESS policies**.

THE USER WANTS TO...	ROW	SWITCH NEEDED
Open someone's Leave planner and see how much leave they have left (Tasks 1 and 2)	Leave > Leave planner	Read
Book leave (Task 1)	Leave > Leave planner	Create
Change a booking or its status, or answer a request (Tasks 1 and 4)	Leave > Leave planner	Update
Delete a booking (Task 1)	Leave > Leave planner	Delete
Choose a status ending in (Finalised) (Tasks 1 and 4)	Finalise leave, under the Leave planner row	On
Use Who else is off? while booking (Task 3)	Leave > Leave planner	The same switches as booking
See the Workforce leave page (Task 3)	Leave > Workforce leave	Read
Use bulk actions in the Leave Awaiting Authorisation window (Task 4)	Leave > Leave planner, and Finalise leave for Approve and finalise	Update. Without it the window is view-only.
Send leave requests from the app (employee)	ESS policy	Leave requests
Choose which types of leave employees can request	ESS policy	Allowed leave reasons
See their balance in the app (employee)	ESS policy	Leave balances

Table 2 — Permissions needed for each task

Booking/amending/deleting an absence

You book leave for someone on their Leave planner. The same window is used to set its status, change it later and delete it.

The permissions for this task are in *What permissions are required*.

How it works

Open someone's leave planner

1 Open the Leave planner

Select **Leave planner** in the sidebar, or open **Menu > Leave > Leave planner**. The page heading reads **Leave planner**. **[Check: the Menu entry appears to be controlled by the Workforce leave permission rather than the Leave planner one. Confirm which permission shows it.]**

2 Choose the person

Select the search button (**Find person**) in the person panel at the top of the page, then pick the person. You see their current leave year: **Allowances** and **Leave booked** on the left, and a calendar of the year on the right.

The person needs a leave policy before you can book anything. Until they have one, the planner says “No leave years yet. Once they have a leave policy, their leave years show here.”

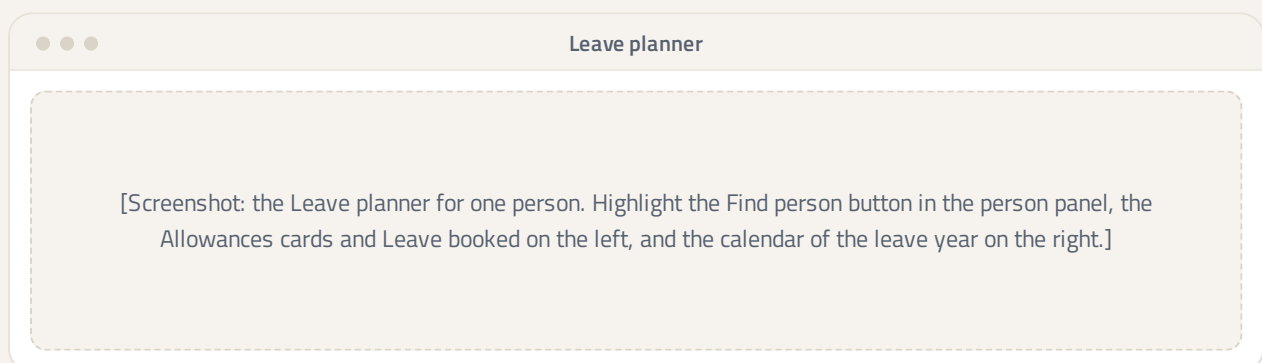


Figure 1 — A person's Leave planner

Book an absence

1 Pick the days

On the **Calendar**, click the first day off. For several days, drag across them, or Shift-click the first day and then click the last. The **Book leave** window opens with those days filled in.

If the day already has leave on it, a window for that day opens instead. Select **Add booking**.

2 Check how they asked

The line at the top of **Booking** says how the person asked, for example "Phoned in by Sam Jones, today at 10:30". A new booking assumes they phoned just now. If not, select **Change**, update **How they asked**, **Who asked**, **When they asked** or **Notes**, and select **Apply**.

3 Choose the category

In **Type of leave**, open **Category** and choose one, for example Holiday.

4 Choose the reason

Open **Reason** and choose one. The list only shows reasons that belong to the category you picked.

5 Check the dates

In **Dates**, check **First day** and **Last day**. **Taken from their allowance** shows how much this booking uses.

6 Read the Insights panel

On the right, **Insights** shows whether the booking fits, for example **Within allowance** and "Deducts 3 days, leaving 17 days of 25 days." Any problems are listed underneath it.

7 Set the status

In **Decision**, set **Status**. See *Set the status to approved* below. Do this before you save.

8 Save the booking

Select **Create**. The window closes, you see "Leave booking saved." and the booking appears on the planner.

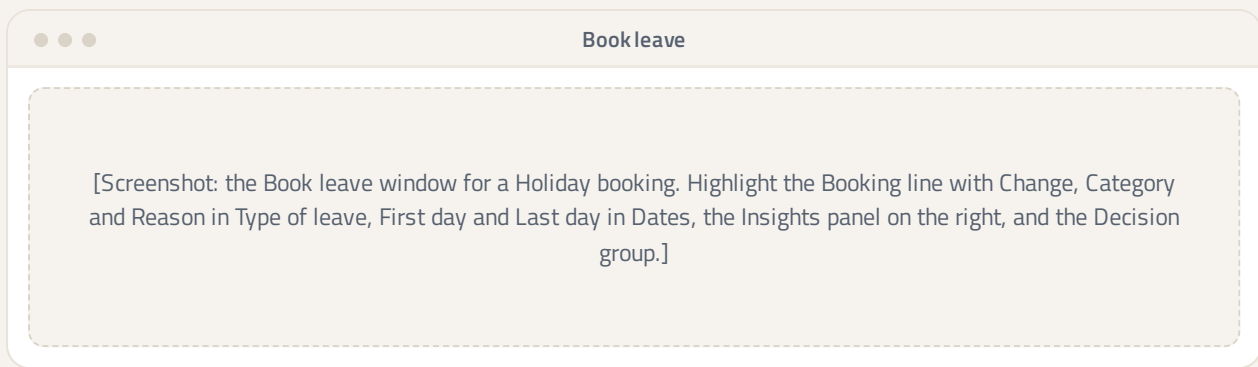


Figure 2 — The Book leave window

Set the status to approved

Leave you book on the web is not approved automatically. In the standard set-up a new booking starts at Awaiting review, which does not come off the allowance. To make it count, move it to Approved (Finalised).

1 Open the Status list

In the **Decision** group, open **Status**. The list only shows the statuses your permissions allow.

2 Choose the status

To approve and sign off in one go, choose **Approved (Finalised)**. If someone else signs leave off in your organisation, choose **Approved awaiting finalisation**. They change it to Approved (Finalised) later.

3 Save

Select **Create** for a new booking or **Update** for an existing one. On the calendar, finalised leave shows in solid colour. Leave that is still waiting shows with a hatched pattern, marked **Requested** in the key.

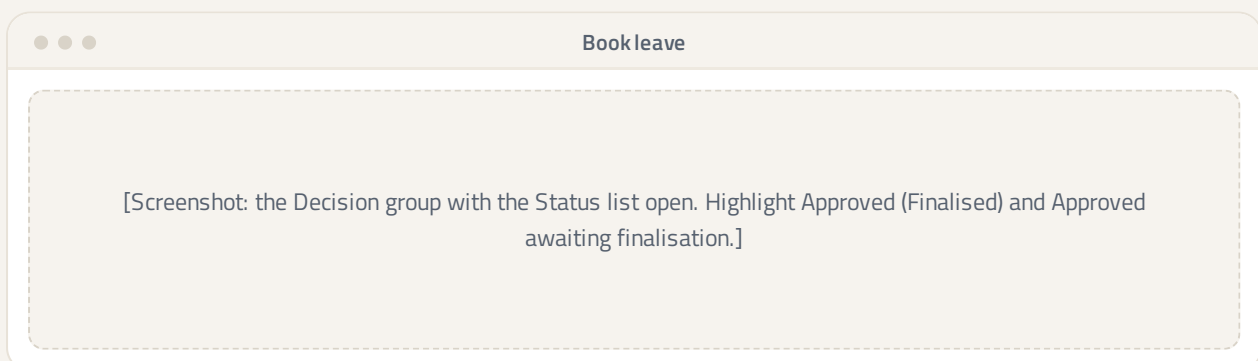


Figure 3 — The Status list in the Decision group

If Approved (Finalised) is missing from the list, you do not have **Finalise leave**. Choose Approved awaiting finalisation and ask someone who has it.

STATUS	WHAT IT MEANS	OFF THE ALLOWANCE?
Awaiting review	New. Nobody has decided yet. Requests from the app always start here.	No · pending
Submit for approval	Put forward to be approved.	No · pending
Approved awaiting finalisation	Approved, waiting for the final sign-off.	No · pending
Approved (Finalised)	Approved and signed off. The leave is confirmed.	Yes
Submit for decline	Put forward to be declined.	No
Declined awaiting finalisation	Declined, waiting for the final sign-off.	No
Declined (Finalised)	Declined and signed off.	No
Submit for cancellation	A cancellation has been asked for, for example by the employee in the app.	No
Cancelled awaiting finalisation	Cancelled, waiting for the final sign-off.	No
Cancelled (Finalised)	Cancelled and signed off.	No

Table 3 — The ten statuses, in the order the Status list shows them

Amend a booking

1 Open the booking

Click a day of the booking on the calendar, then select the booking in the window for that day. Or switch to **List** at the top of the page and select the booking's row. The **Update leave booking** window opens.

2 Make your change

For example, change **First day**, **Last day** or **Reason**. **Insights** shows what the change does, for example "This amendment returns 1 day, leaving 18 days of 25 days."

3 Check the status

Changing the days or reason does not change the status. An approved booking stays approved. Change **Status** yourself if it needs to move.

4**Save**

Select **Update**. You see "Leave booking saved."

Delete a booking

1**Open the booking**

Open it from the calendar or the **List** view, as above.

2**Select Delete**

Select **Delete** at the bottom of the window. A **Wait a second!** window says "You are about to permanently delete this leave booking. This cannot be undone."

3**Confirm you understand**

Tick **I understand this is permanent**.

4**Delete it**

Select **Delete**. You see "Leave booking deleted." and the booking disappears from the planner.

How it connects to other features

- **Leave policy.** Gives the person their leave years and allowances. Without one, the planner is empty.
- **Categories and reasons.** An administrator sets these up in Configuration. A reason can also set the status a new booking starts at.
- **Work pattern.** Decides which days are rest days. With most reasons, rest days are not taken from the allowance.
- **Status.** Decides what comes off the allowance (Task 2), how the leave looks on every calendar (Task 3) and what the employee sees in the app (Task 4).
- **Meetings, Tasks, Documents and Comments.** The tabs on the left of the booking window hold anything linked to the booking.

Things to be aware of

- **Always check the status before you save.** A new booking starts at its reason's default status. That is Awaiting review in the standard set-up, but an administrator can change it. The standard Bank Holiday reason, for example, starts at Approved (Finalised).

- **Create or Update can stay greyed out.** This happens while the check is running, and when the booking cannot be made, for example because it needs more leave than the person has left. Insights then shows **Exceeds allowance**. Leave still waiting for a decision counts in this check, so two requests cannot both use the same days.
- **Declining needs a reason.** Any decline status opens **Why is it declined?**, which you must fill in. The employee will see it.
- **A new booking cannot start as a cancellation.** The three cancellation statuses only appear for bookings that already exist.
- **Declined and cancelled leave drops off the calendar.** Once finalised, it no longer shows on the Calendar or Wall planner, but it stays in the List view.
- **Delete is permanent.** Leave the employee asked for in the app cannot be deleted at all. See Task 4.
- **Continuous?** Some reasons show a **Continuous?** switch, for absences with no known end date. Leave it off for ordinary bookings.
- **Audit.** The **Audit** button on the page toolbar, and in the booking window, shows who created, changed or deleted leave.

Try it yourself

Use a demo or training system, not a customer's live system.

- Book two days of Holiday for a test employee next month. Leave the status at Awaiting review and select Create. Look at their Holiday card under Allowances: it should say "2 days pending".
- Open the booking, change the status to Approved (Finalised) and select Update. Watch the amount left on the card go down by two days.
- Open it again, add one more day, and read what Insights says before you select Update.
- Delete the booking. Check that the card goes back to where it started.

Checking how much leave **someone has left**

Each person's balance is on their Leave planner, with a full breakdown one click away.

The permissions for this task are in *What permissions are required*.

How it works

1 Open the person's Leave planner

Open **Leave planner** and choose the person, as in Task 1.

2 Read the Allowances cards

Under **Allowances**, each card is one category. It shows a ring with the percentage used, the amount left, for example "17 days left", and any leave still waiting, for example "2 days pending".

3 Open the allowance

Select a card. A window opens called, for example, **Holiday allowance** followed by the leave year. At the top, a banner sums it up, for example **Within allowance** and "Used 8 days, leaving 17 days of 25 days."

4 Read the breakdown

Below the banner, a list shows how the balance is worked out. Table 4 explains each line.

5 Check the bookings

On the right, a table lists every booking against this allowance, with **Dates**, **Reason**, the days it uses, **Left after**, **Decision** (its status) and **Status**. The last column shows **Taken**, **Booked**, **Pending** or **Not counted**.

6 Close the window

Select **Close**. The planner refreshes.

7 Look at another leave year

Use the **Previous leave year** and **Next leave year** arrows, or the leave year list between them. A label beside it says whether the year is **Current**, **Closed** or **Planning**.

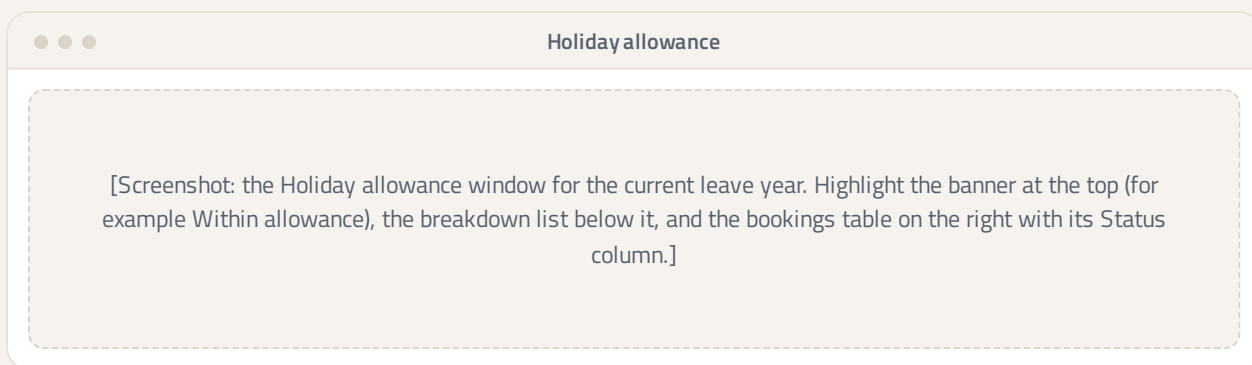


Figure 4 — The allowance window

LINE	WHAT IT MEANS
Allowance for the year	What their leave policy gives them for this leave year.
Carried over from last year	Leave brought forward from the year before.
Adjustments	Leave added or taken away by hand.
Total for the year	The three lines above added together.
Earned so far	Only for allowances that build up through the year. How much they have earned to date.
Taken	Approved (Finalised) leave that has already finished.
Booked	Approved (Finalised) leave that has not finished yet.
Left	What they still have to use: the total, less Taken and Booked.
Waiting for a decision	Leave booked or asked for that is not finalised yet. It is not taken off Left.
Can go below zero by	How far their policy lets the balance go below zero, if at all.

Table 4 — The lines in the allowance window. Some lines only appear when they apply.

You also see the balance while booking. The **Insights** panel in the booking window shows what the booking takes and what will be left.

How it connects to other features

- **Leave policy.** Sets the allowance, the leave year, and how much can be carried over.
- **Status.** Only Approved (Finalised) leave counts as Taken or Booked (Task 1).

- **The timeware app.** Employees see how much they have used and have left, if their ESS policy has **Leave balances** switched on. The figures come from the same place as the web.

Things to be aware of

- **"Approved, but my balance hasn't changed."** Check the status. Approved awaiting finalisation still counts as pending. The balance only changes at Approved (Finalised). In the app, the employee already sees **Approved** at that stage.
- **Asking to cancel gives the days back straight away.** When an employee asks to cancel approved leave, it moves to Submit for cancellation and stops coming off the allowance, even before a manager agrees.
- **Pending is not taken off.** Pending leave shows on the card and in **Waiting for a decision**, but not in Left.
- **Rest days are not counted.** A week off usually uses fewer days than calendar days, because rest days from the person's work pattern are left out. Insights says so when it happens.

Try it yourself

- Open a test employee's Leave planner and write down the Holiday card's figures.
- Open the Holiday allowance window. Check that Total for the year, less Taken and Booked, gives the Left figure.
- Find one booking in the table on the right that shows Pending. Open it on the planner and work out what would need to change for it to count.

Seeing who else is off

There are three places to see who else is away: the Workforce leave page, the Who else is off? window while you book, and the Workforce dashboard.

The permissions for this task are in *What permissions are required*.

How it works

See everyone who is off in a month

1 Open Workforce leave

Select **Workforce leave** in the sidebar, or open **Menu > Leave > Workforce leave**. The page heading reads **Workforce leave** and shows the current month.

2 Choose the month

Use the **Previous** and **Next** arrows, or select **Open calendar** to jump to a date.

3 Narrow down the people

Select **Workforce** at the top of the page to choose a team, site or saved filter. The button shows your current choice and how many people match, for example "Workforce ■ Unfiltered ■ 120 of 120". This choice also applies to other workforce pages and the dashboard.

4 Filter by leave type or name

Use the category chips to show only some types of leave. Type a name in the search box to find one person.

5 Read the grid

Each row is someone who is off that month, and each column is a day. The bottom row counts how many people are off each day. The key explains the patterns: **Requested**, **Decline pending**, **Cancellation pending**, **Rest day**, **Bank holiday**, **Multiple** and **Today**. Solid colour means Approved (Finalised).

If nobody is away, you see "No one is on leave this month."



Figure 5 — Workforce leave

Check who else is off while booking

1 Open the Who else is off? window

In the booking window, in **Dates**, select **Who else is off?**.

2 Read the window

The person you are booking for is at the top, with the new booking marked **This booking**. Below are the other people off from two weeks before to two weeks after, with a daily count. If nobody else is off, you see "No one else is off around these days."

3 Narrow it down if needed

Use the filter in the window to look at one team or site. This does not change your Workforce choice elsewhere.

4 Go back to the booking

Select **Close**. Nothing in the booking has changed.

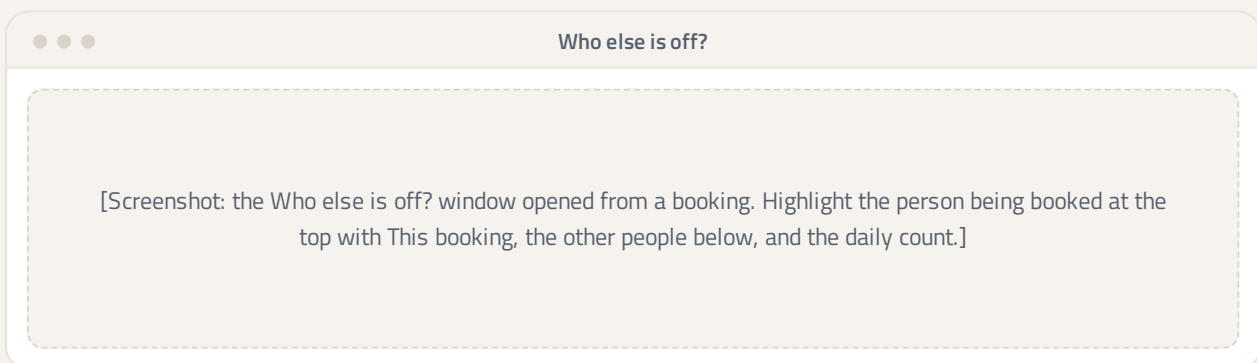


Figure 6 — Who else is off? while booking

Check the dashboard

1 Open the Workforce dashboard

Select **Workforce dashboard** in the sidebar.

2 Look in Your alerts

If your dashboard includes it, a line such as “5 leave bookings starting in the next 7 days” appears. Select **View** to open **Upcoming Leave**, which lists each person with their dates, reason and status.

How it connects to other features

- **Status.** Every calendar uses the same patterns for status (Task 1). Declined (Finalised) and Cancelled (Finalised) leave is never shown.
- **Workforce filter.** The **Workforce** choice is shared with other workforce pages, dashboard alerts and the Leave Awaiting Authorisation window (Task 4).
- **Dashboard policies.** Which alerts appear on your dashboard is set in your dashboard policy.
- **The person's own planner.** Workforce leave is for looking. To change someone's leave, open their Leave planner.

Things to be aware of

- **Pending leave is included.** People with leave still waiting for a decision appear, with the hatched pattern. Count them in when you plan cover.
- **Big teams are capped.** Workforce leave loads up to 100 people and says, for example, “Showing 100 of 140 people”. Narrow the filter to see the rest. The Who else is off? window shows up to 25 people.
- **Upcoming leave counts approved leave only.** By default it includes Approved awaiting finalisation as well as Approved (Finalised).
- **One person's year.** The Calendar, Wall planner and List views on the Leave planner show one person only. They are not a team view.

Try it yourself

- Open Workforce leave for next month. Find the busiest day using the count along the bottom.
- Use Workforce to narrow the page to one department, then change it back to Unfiltered.
- Start a booking for a test employee on that busy day and select Who else is off?. Check that you see the same people. Then select Cancel so nothing is saved.

Dealing with employee leave requests

Employees ask for leave in the timeware app. Each request arrives as a leave booking with the status *Awaiting review*, and you answer it by changing its status.

The permissions for this task are in *What permissions are required*.

How it works

What the employee does

In the app, the employee opens **Leave** and selects **Request leave**. They choose **What kind of leave?**, a **First day** and a **Last day**, add a note if they want, and select **Send request**. They see "Request sent - your manager will review it".

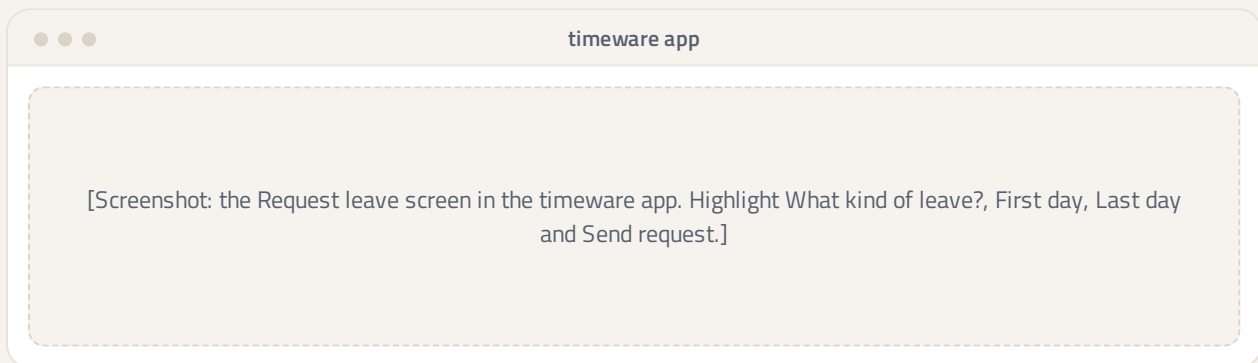


Figure 7 — Asking for leave in the timeware app

Find new requests

New requests show up on the Workforce dashboard, in **Your alerts**. You can also find them from the Menu or on the person's own planner.

1 Check Your alerts on the dashboard

On the **Workforce dashboard**, **Your alerts** can show a line such as "3 leave requests to authorise". Select **Review**. The **Leave Awaiting Authorisation** window opens.

2 Or search the Menu

Open **Menu**, type *Leave Authorisation* into **Search pages, people and actions**, and select **Leave Authorisation**. The same window opens.

3 Or look at the person's planner

On their Leave planner, the request shows with the hatched **Requested** pattern, and their allowance card shows it as pending.

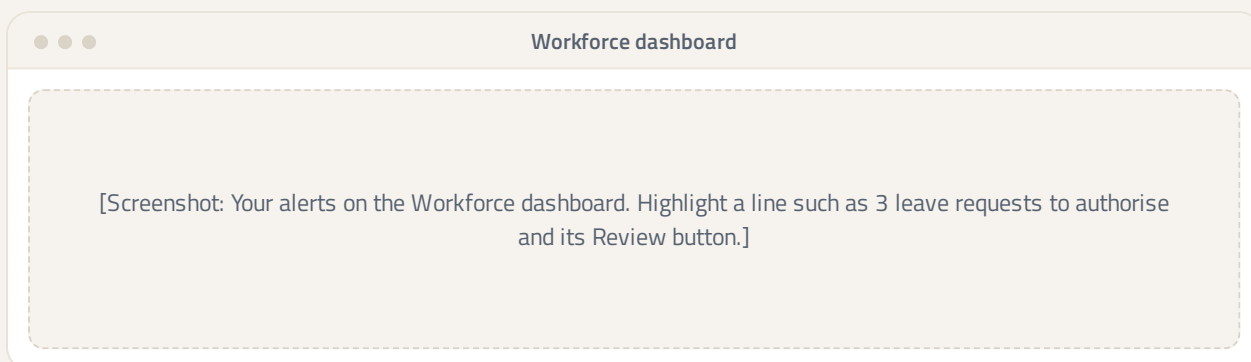


Figure 8 — A leave request in Your alerts

Answer one request

1 Open the request

In Leave Awaiting Authorisation, point at the row and select **Open booking**. Or open it from the person's Leave planner. The **Update leave booking** window opens.

2 Read what they asked for

The top line says "Asked in the timeware app", when they asked, the dates and their comment. Select **View** for **Asked by**, **Asked on**, **Dates they asked for**, **Reason they chose** and **Their comment**.

3 Check the impact

Read **Insights** to see if it fits their allowance. Select **Who else is off?** to check cover.

4 Choose the new status

In **Decision**, open **Status**. To approve, choose Approved (Finalised) or Approved awaiting finalisation. To decline, choose Declined (Finalised), Declined awaiting finalisation or Submit for decline.

5 Say why, if declining

Fill in **Why is it declined?**. The employee will see this in the app.

6 Save

Select **Update**. The request updates in the employee's app and they get a notification.

Answer several requests at once

1 Open Leave Awaiting Authorisation

Open it from **Your alerts** or the Menu search, as above. It lists every booking that still needs a decision or a final sign-off, not only app requests.

2 Choose a view

Choose **All**, **Awaiting decision** or **Awaiting finalisation**. You can also search by name or reason.

3 Check a request if needed

Point at a row and select **Insights** to see its effect on the allowance without leaving the list.

4 Pick the requests

Tick the rows you want to answer.

5 Choose what to do

Select **Approve** (Approved awaiting finalisation) or **Approve and finalise** (Approved (Finalised)). To do something different for one row, choose a status in that row's own list. Rows that can go ahead show **Ready to authorise**. Rows that cannot show the reason.

6 Give a reason for any declines

If any row is being declined, fill in **Reason for declining?**. The same reason is used for every declined row.

7 Authorise

Select the button at the bottom, for example **Authorise 3 of 3**. Only the rows marked Ready to authorise are sent.

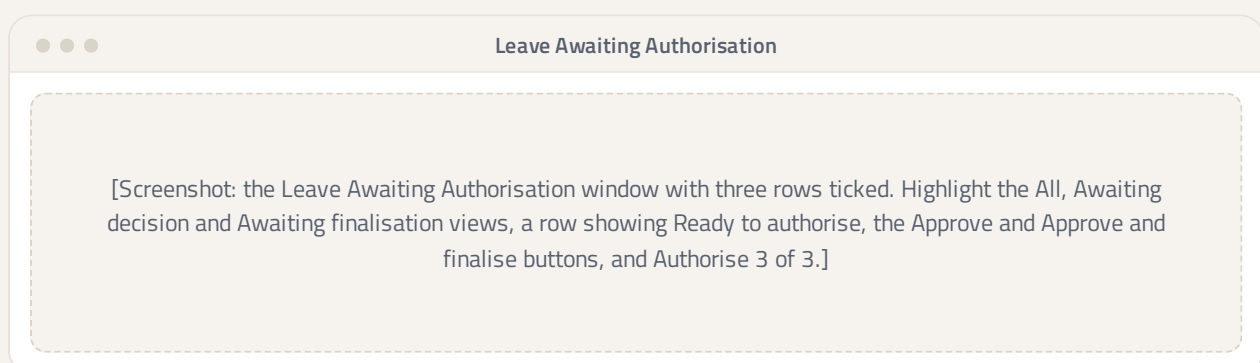


Figure 9 — Answering several requests at once

When an employee wants to cancel

What happens depends on whether the leave was approved.

- **Not approved yet.** The employee selects **Cancel this request** in the app. It is cancelled straight away and moves to Cancelled awaiting finalisation. You can finalise it by choosing Cancelled (Finalised).
- **Already approved.** The employee selects **Ask to cancel this leave**. It moves to Submit for cancellation and appears in your Awaiting decision list. To agree, choose Cancelled (Finalised). To say no, set it back to Approved (Finalised).
- **You need to cancel it yourself.** Open the booking and choose a cancellation status, for example Cancelled (Finalised). You cannot delete it.

STATUS ON THE WEB	WHAT THE EMPLOYEE SEES IN THE APP
Awaiting review	Waiting for review
Submit for approval	Waiting for approval
Approved awaiting finalisation Approved (Finalised)	Approved
Submit for decline Declined awaiting finalisation Declined (Finalised)	Declined
Submit for cancellation	Cancellation requested
Cancelled awaiting finalisation Cancelled (Finalised)	Cancelled

Table 5 — How each status reads in the timeware app

How it connects to other features

- **ESS policy.** Switches leave requests on or off for each employee and sets which reasons they can pick.
- **Booking window.** A request opens in the same window as any booking (Task 1). You can still change its dates or reason before you approve it.
- **Allowance.** An approved request only comes off the allowance at Approved (Finalised) (Task 2).
- **Workforce filter.** Leave Awaiting Authorisation only lists people inside your current **Workforce** choice (Task 3).

Things to be aware of

- **Requests cannot be deleted.** For leave asked for in the app, **Delete** is greyed out. Pointing at it shows "This leave was asked for in the timeware app, so it can't be deleted. Decline or cancel it instead."
- **What they asked for is read-only.** You cannot edit the details in **View**. They are kept as a record even if you change the booking.
- **The app shows the outcome early.** The employee sees Approved as soon as you choose Approved awaiting finalisation, and Declined as soon as you choose Submit for decline.
- **Requests always start at Awaiting review**, whatever the reason's default status.
- **Asking to cancel returns the days at once.** Leave at Submit for cancellation no longer comes off the allowance, even before you agree (Task 2).
- **Bulk actions need the right permissions.** Without Update on the Leave planner row, the Leave Awaiting Authorisation window is view-only. Approve and finalise only appears if you have Finalise leave.

Try it yourself

You need a test employee who can sign in to the timeware app on a demo system.

- In the app, request one day of leave for next week.
- On the web, find it in Leave Awaiting Authorisation. Open it and read what they asked for.
- Approve and finalise it. Check that the app now shows Approved and the balance has gone down by one day.
- In the app, select Ask to cancel this leave. On the web, agree to the cancellation by choosing Cancelled (Finalised).