



# Tempora Leave Management Admin Guide

## Quick Links for Frequently Asked Questions

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- [How do I set someone's entitlement for other types of leave?](#)
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## 1. Setting Holiday Entitlement

### 1.1 Annual Leave

- 1) Click on **Admin > Holiday > Configuration > Holiday Entitlement Rules**
- 2) Set **Staff** to the name of the staff member that you need to give entitlement to.
- 3) Set **Periods** = 1
- 4) Set **Period Length** = 1
- 5) Set **Units** = Day
- 6) Set **Days** = Number of days holiday entitlement to the nearest half day (0.5)
- 7) Tick **at Year End**
- 8) Click **Update**
- 9) Click **Save**

### 1.2 Other Leave Types (e.g. Study Leave, Maternity Leave etc.)

- 1) Click on **Admin > Holiday > Staff Holiday Entitlement**
- 2) Set **Staff** to the name of the staff member that you need to give entitlement to
- 3) Click **Edit** on the type of leave for which entitlement is to be allocated
- 4) Enter the **number of days entitlement** to the nearest half day (0.5)
- 5) Click **Update**
- 6) Click **Save**

## 2. Setting up Holiday Approvers

### 2.1 Roles

Roles are used to grant staff members the ability to approve holiday requests from individuals, their department or the entire company. Roles are found under **Admin > Staff > (Name of Approver) > Roles > (Name of company)**.

The roles that can be granted to holiday approvers are:

- **Holiday Approve** – can approve an individual's holiday request.
- **Holiday Department Approve** – can approve the holiday requests of everyone in the same department as the approver (except for the approver themselves).
- **Holiday Company Approve** – can approve the holiday requests of everyone in the entire company (except for the approver themselves).

There are also corresponding “notification” roles that should be granted to ensure that the holiday approvers receive an email notification when someone requests a holiday:

- **Holiday Notification** – receives an email notification for an individual’s holiday request.
- **Holiday Notification for Dept** – receives an email notification for holiday requests made by anyone in the same department as the approver (except for the approver themselves).
- **Holiday Notification for Company** - receives an email notification for holiday requests made by anyone in the entire company (except for the approver themselves).

On the roles page, **tick the checkboxes** to enable / disable these roles for a staff member, and then click **Save**.

## 2.2 Delegates

Delegates are used to define who approves whom when using the department / company roles on their own is not an option. Delegates are found under **Admin > Delegates**. To say that Person A approves Person B:

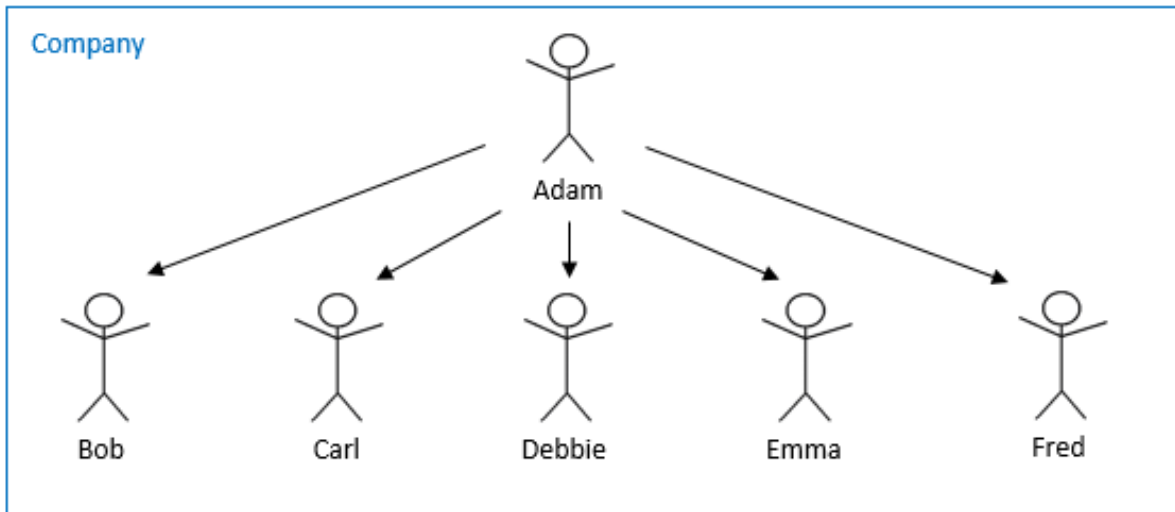
- 1) Click on **Admin > Delegates**
- 2) Set **Function** = Holiday Approve
- 3) Set **Delegate** = Person A
- 4) **Tick the checkbox** for Person B
- 5) Click **Save**
- 6) Set **Function** = Holiday Notification
- 7) Set **Delegate** = Person A
- 8) **Tick the checkbox** for Person B
- 9) Click **Save**

## 2.3 Self-Approval

To say that person X approves their own holiday requests:

- 1) Click on **Admin > Delegates**
- 2) Set **Function** = Holiday Approve
- 3) Set **Delegate** = Person X
- 4) **Tick the checkbox** for Person X
- 5) Click **Save**
- 6) Set **Function** = Holiday Notification
- 7) Set **Delegate** = Person X
- 8) **Tick the checkbox** for Person X
- 9) Click **Save**

## 2.4 Setting Up Holiday Approvers - Example 1



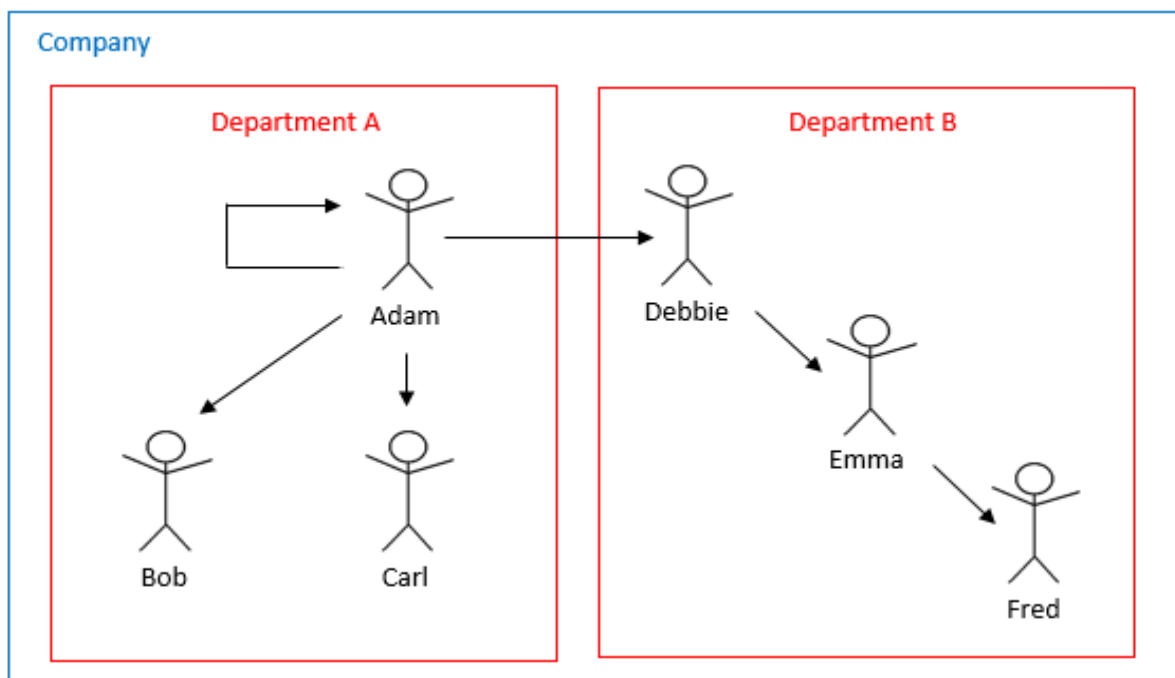
Arrows represent who approves whom (in the above example, Adam approves everyone).

### Roles to set up

- Adam
  - **Holiday Company Approve**
  - **Holiday Notification for Company**

Delegates to set up - **None**

## 2.5 Setting Up Holiday Approvers - Example 2



**Roles to set up**

- Adam
  - **Holiday Approve**
  - **Holiday Notification**
  - **Holiday Department Approve**
  - **Holiday Notification for Dept**
- Debbie
  - **Holiday Approve**
  - **Holiday Notification**
- Emma
  - **Holiday Approve**
  - **Holiday Notification**

**Delegates to set up**

- Adam
  - **Holiday Approve for Adam**
  - **Holiday Notification for Adam**
  - **Holiday Approve for Debbie**
  - **Holiday Notification for Debbie**
- Debbie
  - **Holiday Approve for Emma**
  - **Holiday Notification for Emma**
- Emma
  - **Holiday Approve for Fred**
  - **Holiday Notification for Fred**

### 3. Approving / Declining Holiday Requests

To approve / decline a holiday request:

- 1) Click on **Admin > Holiday > Holiday Approval**
- 2) Set the **From Date** to the start date of the holiday request to be approved / declined
- 3) Click **Refresh**
- 4) Click on the **coloured cells** for the staff member that requested the holiday
- 5) Click on **Approve** or **Decline** as required.

### 4. Cancelling Pre-Approved Holiday Requests

To cancel a holiday request that's already been approved:

- 1) Click on **Admin > Holiday > Holiday Request/Cancel**
- 2) Select the **Person** whose pre-approved holiday request needs to be cancelled
- 3) Click on the **coloured cells** for the holiday to be cancelled
- 4) Click **Request**

If the holiday is still showing in the holiday grid, then you will need to:

- 1) Click on **Admin > Holiday > Holiday Approval**
- 2) Set the **From Date** to the start of the holiday to be cancelled
- 3) Click **Refresh**
- 4) Click on the **coloured cells** for the staff member that requested the holiday
- 5) Click **Approve**

### 5. Requesting Holiday on Behalf of Someone

- 1) Click on **Admin > Holiday > Holiday Request / Cancel**
- 2) Select the **Person** to request holiday on behalf of
- 3) Select the **Type** of holiday
- 4) In the holiday grid, click on the cell for the **start date** and then the **end date**
- 5) Click **Request**

## 6. Recording Sickness

- 1) Click on **Admin > Sickness > Recording**
- 2) Select the **Staff** member that was off sick
- 3) Select the **From** and **To** Dates for the sickness
- 4) Click **Save**

## 7. Setting a Staff Member's Department

- 1) Click on **Admin > Staff > (Name of Staff Member) > Cost Rates > (Name of Company)**
- 2) Click on **Edit**
- 3) Change the **Department** as required
- 4) Click **Update**
- 5) Click **Save**

## 8. Troubleshooting

### **A Staff member can't request all of the holiday types defined under Admin > Holiday > Configuration > Holiday Type (e.g. Study Leave, Maternity Leave etc.)**

Staff members need to be allocated entitlement for special leave types before they can request these types of leave (see Section 1.2 above).

### **An approver is not receiving holiday requests that they should be receiving.**

- Check the approver's department (see Section 7 above)
- Check the approvee's department (see Section 7 above)
- Check the approver's roles (see Section 2.1 above)
- Check the approver's delegates (see Section 2.2 above)

### **I don't have Leave Management Admin permissions.**

Ask the Tempora administrator at your organisation to grant you the following Roles under Admin > Staff > (Your Name) > Roles > (Your Organisation):

- Holiday Administrator
- Holiday Supervisor
- Holiday Company Approve
- Holiday Req/Cancel for Company
- Sick Recording for Company
- Sickness Administrator
- Sickness Recording

### **I have a problem that isn't covered by this guide.**

Contact us at [support@temporasoftware.com](mailto:support@temporasoftware.com)