

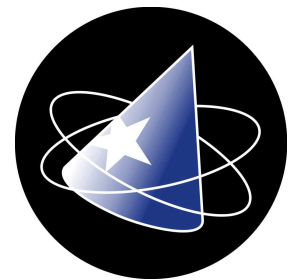
**How To Guide...**

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# **Configuring Holiday Schemes**

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**Wiztec Business Suite  
& WizHR 5**



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## Holiday Schemes



### Purpose

Each company has a policy on the number of days/hours paid leave an employee is entitled to. WBS calculates each employees holiday entitlements based on length of service. Holiday Schemes must be set up prior to using WBS. Once holiday schemes are configured, each employee in the database must be assigned to a holiday scheme (this is a mandatory field).

### Location

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Holiday Schemes**

*alternatively*

1. Click on **Preference**
2. Click on **Setup Wizard**
3. Click on **Step 2: Holiday & Absence** (*Outlook bar*)
4. Click on **Holiday Schemes**

## Creating a Holiday Scheme

### A. Setting Holiday Scheme

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Schemes**
3. Click on **Add**
4. In the text box to the right of **Scheme Name**, key in the name of the **Scheme** (*e.g. Wiztec Default*)
5. Click on the drop down arrow to the right of **Absence Taken In** and select either **days** or **hours**



#### Note:

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If an employee assigned to this scheme in on an hourly scheme, all holiday and absence will be quantified in hours and visa versa. It is not possible to mix absence/holiday calculation between hours and days in the one holiday scheme.

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### B. Carrying Over Leave

6. If your company allows employees to carry over leave from the previous year, click in the check box **Carry Over Un-Used Holiday Entitlement**
7. Click on the up/down arrows to indicate the maximum number of days an employee can carry over to the following year



## Note:

If you do not select this option, every employee on this holiday scheme will have a Leave Carried Forward of zero at the beginning of each holiday year

### C. Include Weekends in Holiday Calculations

- If your company includes weekends as part of holiday calculations (*e.g. an employee takes a Friday and Monday, this is calculated as 4 days if weekend days are counted*), click on the check box to the left of **Include Weekends in Holiday Calculations**

### D. Include Holiday Exceptions in Holiday Calculations

- If your company includes holiday exceptions (*e.g. Bank Holidays*) as part of holiday calculations (*e.g. an employee takes a the day before St Patrick's Day and the day after St. Patrick's Day, this is calculated as 3 days if Holiday exceptions are counted*), click on the check box to the left of **Include Holiday Exceptions in Holiday Calculations**
- Click on **Default Scheme** if this holiday scheme applies to the majority of employees in the company.

### F. Setting Holiday Allowances (Using Length of Service)

- Click on the **Allowances** tab
- Your company's holiday allowance policy (*i.e. the number of days/hours paid leave an employee is entitled to per year*) is keyed in here
- Click on **Add New Allowance** button (*button with the plus sign at the bottom left of the screen*). An asterisks appears on the left hand side of the record.
- Key in the allowance (*e.g. 20*)
- Press tab, and key in the **Service From** (*e.g. 0*)
- Press tab, and key in the **Service To** (*e.g. 5*).

Allowances

| Allowance | Service From (Years) | Service To (Years) |
|-----------|----------------------|--------------------|
| 20        | 0                    | 5                  |
| 22        | 6                    | 10                 |
| 23        | 11                   | 15                 |
| 24        | 16                   | 20                 |

Add new allowance    Edit Allowance  
 +   -   ▲   ✓    Save Allowance  
 Delete allowance

17. Reading the example above: - Every employee on this scheme will be automatically assigned 20 days annual leave allowance. In the employees sixth year of service with the company, the employee will be assigned 22 days annual leave allowance, etc.

**Note:**

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If you have elected that this is an hourly holiday scheme, the leave allowance must be in hours and not days

It is also possible to establish [Absence Rules](#) for each Holiday Scheme.

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## Absence Rules

Rules may be applied to each Holiday Scheme in WBS. These rules may be used to alert a user that an employee has exceeded the number of allowable days (e.g. Certified Sick Leave) in a given year. The rules allow for the user to indicate, what pay must be deducted from the employee as a result.

Once a rule has been attached to a holiday scheme, each time an absence with a specified Absence Category (e.g. Certified Sick Leave) is keyed into an employees file, a dialog box will appear to confirm the number of days payable and deducted pay.

## Pay Restriction Rules

To apply Pay Restriction Rule to a Holiday Scheme, complete the following steps:

**Note:**

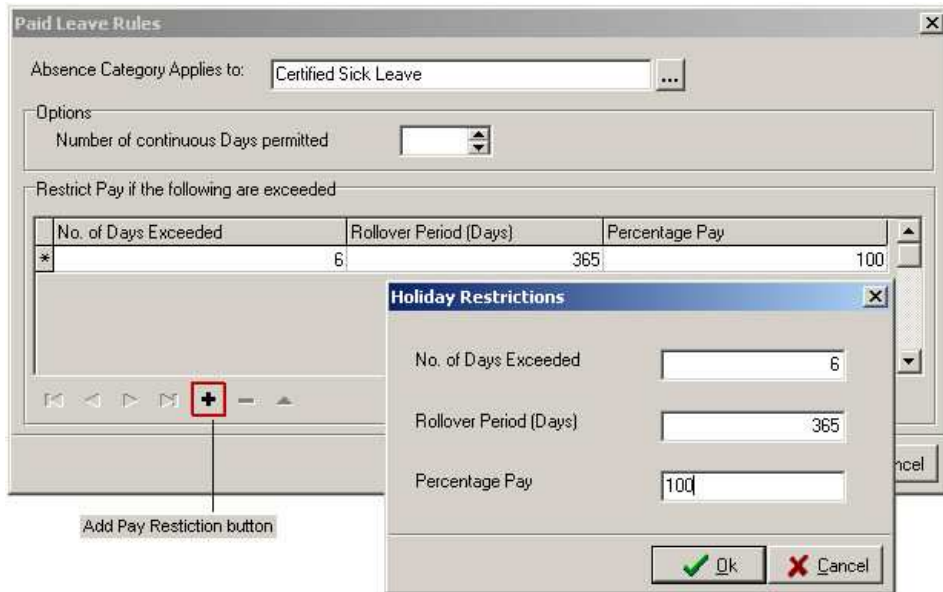
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If you want to apply a similar to rule to other holiday schemes, they must be done separately.

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1. Click on **Company** (menu bar)
2. Click on **Holiday Schemes**
3. Click on the **List** tab
4. Double click on the **Holiday Scheme** you want to add the rule to
5. Click on the **Rules** tab
6. Click on the **Edit** button (sub screen toolbar)
7. Under **Paid Leave** Rules, click on the **Add Rule** button (+ sign)
8. The **Paid Leave Rules** dialog box appears
9. Select an **absence category** from the pick list (this pick list is populated from the Category pick list in the Holiday & Absence screen)
10. Under **Options**, key in the number of continuous days permitted. Leave this blank if it does not apply.
11. Click on the **Add Restriction** button (+ sign) Restrict Pay if the following are exceeded
12. Key in the number of days which must be exceed before the absence/pay rule will be applied
13. Key in the **roll-over period** (e.g. 365 days)

14. Key in the percentage of pay which will be deducted if the employee exceeds the stated number of days. If you key in 40%, the employee will received 40% of pay for the days they are out. In the example below, 100% has been keyed in. In this case, the employee will 100% of their pay while on sick leave. However, the user will be alerted that this employee has exceeded the allowable number of sick leave days in the year.



15. Click on **OK**
16. Add in as many **Pay Restrictions** as you require for this holiday scheme
17. Click on **OK** when finished
18. Click on **Save**
19. The following dialog box may appear:-



20. Click on **OK**

When you key a Certified Sick Leave absence into an employees Holiday and Absence file, a dialog box similar to below will appear: -

**Pay Details Confirmation** [X]

Current Settings

Pay Scheme: **Certified Sick Leave**      Daily Pay: **93.46**

Pay Calculations

No. of Days (Duration): **2**      No. of Days Payable: **2**

Pay: **186.92**      Pay Deducted: **0.00**

Days to Date

| Start Date   | Duration | Days Paid |
|--------------|----------|-----------|
| ▶ 01/01/2004 | 2        | 2         |

[OK] [Cancel]

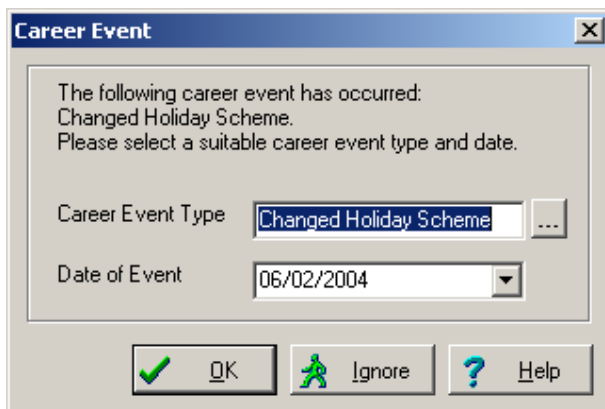
## Assigning Holidays Schemes to Employees

Once you have a holiday scheme created, you need to assign that holiday scheme to employees. This may be done by:-

- a) [individually](#) assigning a holiday scheme to an employee
- b) assigning a holiday scheme to a [group](#) of employees

### a. Change Employee Holiday Scheme

1. Open the **Employee Details** screen
2. Navigate to the employee whose Holiday Scheme you wish to alter
3. Click on the **Edit** button (*sub screen toolbar*)
4. Click on the **Leave** tab
5. Click on the drop down arrow to the right of **Scheme** and select a new holiday scheme for the employee
6. Click on **Save** (*sub screen toolbar*)
7. The following dialog box may appear: -



8. If you want to track the change in holiday scheme as a career event, click on **OK**



## b. Assign Holiday Scheme to a Group of Employees



Holiday Schemes should only be applied in the following two instances: -

1. If after installing WBS, Holiday and Absence records and Holiday schemes are imported from another system (*e.g. Microsoft Excel or another HR application*)
2. If you have made a change to an existing holiday scheme (*e.g. changed the holiday allowance*). A change to a holiday scheme will not automatically recalculate employees holiday allowance. However, by Applying the Holiday Scheme, WBS is forced to complete a recalculation.



### Note:

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Applying a holiday scheme will only recalculate information in the currently opened database (*if you wish to apply holiday schemes across each database, you must open each database individually*)

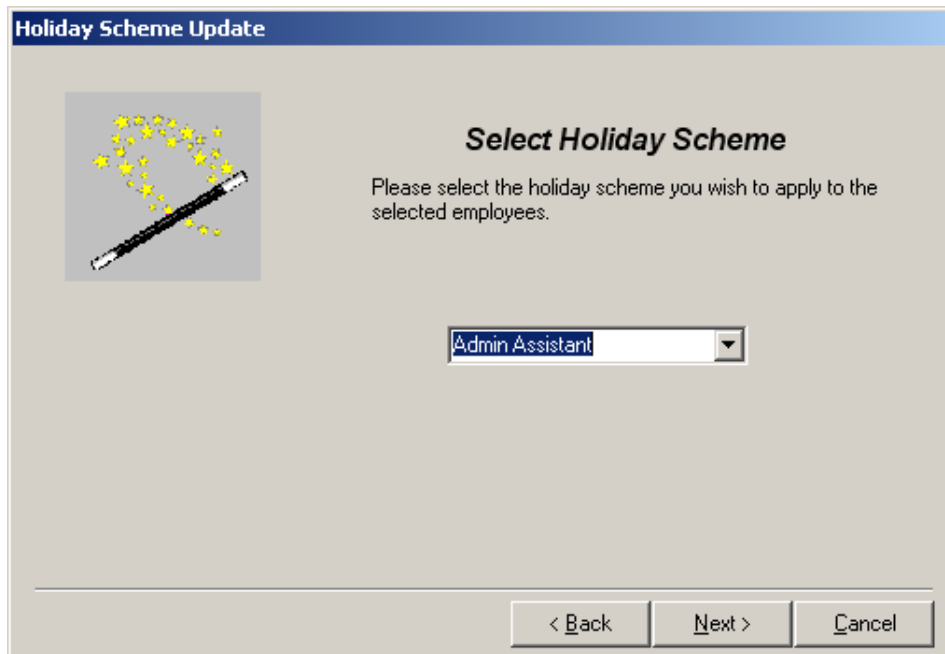
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1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Apply holiday schemes**
4. The following screen appears: -

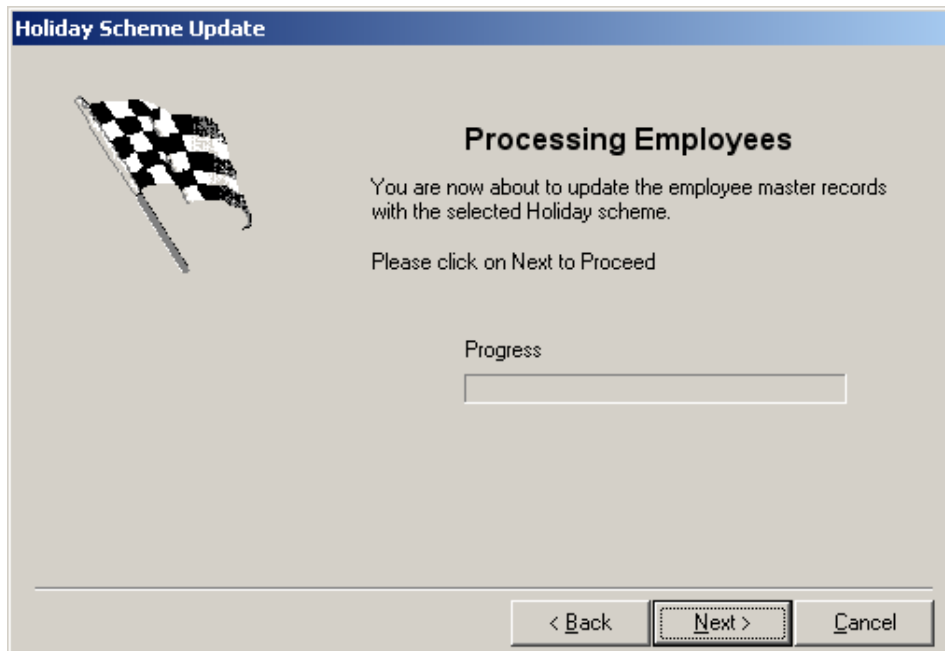


5. Select **All Employees** or **Employees in a Group** (*if you have placed the employees who are affected by the changed Holiday Scheme in a group prior to running this program*)

6. Click on **Next**



7. Click on the drop down arrow and select the holiday scheme you wish to apply (*e.g. Wiztec Default*)
8. Click on **Next**



9. Click on **Next**
10. Wait a few moments while WBS recalculates each employees holiday allowance
11. Click on **Finish** when the blue status indicator reaches the far right

## Holiday Exceptions



### Purpose

At the beginning of each year the holiday exceptions must be included. These include bank holidays, festive holidays, etc. Holiday exceptions affect holiday and absence calculations for an employee. See section on Holiday Schemes and [Holiday Exception calculations](#).



#### Note:

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Holiday exceptions must be re-entered each year

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### Location

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Holiday Exceptions**

*alternatively*

1. Click on **Preference**
2. Click on **Setup Wizard**
3. Click on **Step 2: Holiday & Absence** (*Outlook bar*)
4. Click on **Holiday Exceptions**

### To Add Holiday Exceptions

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Holiday Exceptions**
4. Click on **Add**
5. Click on the drop down arrow to the right of **Date** and select the date of the next Bank Holiday
6. Tab down to the **Description** field and key in a description for the date selected (*e.g. St. Patrick's Day*)
7. Click on **Save**
8. Repeat the process for each holiday exception
9. If you accessed the Holiday Exceptions screen through the **Preferences** menu, click on **Exit** at the bottom right hand corner of the screen, to return to WBS



# Holiday Settings

## Purpose

Prior to using WBS, ensure that the holiday settings screen is configured for the current holiday year.

The Holiday Settings are used for a number of screens:-

- Holiday & Absence
- Flexi time Setup

WBS automatically calculates (*in the Holiday & Absence Screen*): -

- The total number of days an employee has taken in a year
- The percentage of days lost in a year
- The total days lost since joining the company
- The percentage of days lost since joining the company
- Holidays taken in a year
- The number of annual leave days left this year
- Leave carried over from the previous year

In order for WBS to accurately calculate these figures, the organisations holiday year must be set to the current year. The Holiday Year is automatically set by the End of Year Maintenance Program.

## Location

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Holiday Settings**

## Setting/Checking the Current Holiday Year

1. Click on **Company** (*menu bar*)
2. Click on **Holiday Configuration**
3. Click on **Holiday Settings**
4. Click on the drop down arrow beneath **Begins** and select the Start Date of your holiday year
5. The end date of the holiday year will be automatically set



### Note:

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The Dates above need not be the calendar year. It is possible that the holiday year may begin on 01 March.

You can only have one holiday year set up. i.e. the system does not currently have the capability to apply multiple holiday years (*e.g. if half of your staff had a holiday year from January to December and the other half had a holiday year from March to April*). In this case, one or other must be selected.

## Employee Leave Entitlement Details

It is possible to get a snapshot of an employees leave entitlement, leave taken and leave remaining from the Leave tab in the Employee Details screen.

| Terms                  | Leave                    | Pay | Details | Dates | Add |
|------------------------|--------------------------|-----|---------|-------|-----|
| <b>Holiday Details</b> |                          |     |         |       |     |
| Scheme                 | Standard                 |     |         |       |     |
| Scheme Effective Date  | 14/06/2005               |     |         |       |     |
| Leave Carried Fwd      | 2                        |     |         |       |     |
| Leave Allowance        | 11                       |     |         |       |     |
| Leave Taken            | 0                        |     |         |       |     |
| Leave Remaining        | 13                       |     |         |       |     |
| Work Time Equivalent   | 1                        |     |         |       |     |
| Override Hol Allowance | <input type="checkbox"/> |     |         |       |     |

|                              |       |   |  |
|------------------------------|-------|---|--|
| <b>Scheme</b>                | Leave | Alphanumeric (drop down)                          | Holiday Scheme which the employee is assigned to. The Scheme drop down list is populated by data keyed into the <a href="#">Company Holiday Scheme</a> screen. This is a mandatory field |
| <b>Scheme Effective Date</b> |       | Date  | The date the holiday scheme is effective from. If you leave this field blank it will automatically be populated with the date in the Date of Join field                                  |
| <b>Leave Carried Forward</b> |       | Numeric<br><br>(Read Only for non-administrators) | The number of hours/days Annual Leave the employee has carried over from the previous holiday year. Only an administrator of WBS has access to change the data in this field.            |

## Leave Allowance

## Leave Taken

## Leave Remaining

## Work Time Equivalent

## Override Hol Allowance

|         |  |
|---------|--|
| Numeric | The Leave Allowance is calculated based on the Holiday Scheme assigned to the employee and the Scheme Effective Date or Date of Join   |
| Numeric | The Leave Taken is calculated based on data keyed into the <a href="#">Holiday and Absence</a> screen  |
| Numeric | $LR = LCF + LA - LT$   |
| Numeric | <p>Whole Time Equivalent (WTE/FTE)<br/>Indicates the proportion of a job which an employee is working. For instance if you have an employee who is working full contractual hours, then their WTE will be 1.</p> <p>If an employees' full contractual hours are 35 but chooses to take job sharing, reducing their hours to 17.5, then their WTE will be 0.5 (i.e. 17.5/35).</p> <p>If an employees' full contractual hours are 35 but chooses to work part time on 5 hours a week, their WTE will be 0.14 (i.e. 5/35)</p> <p>The WTE will also affect an employee leave entitlement (e.g. if an employee is job sharing, their WTE will be 0.5. This also means that their leave entitlement will be halved).</p> |
| Logical | This field allows you to overwrite the Annual Leave Allowance which is inserted to the Leave Allowance field   |

## Tracking and Recording Employee Leave

### Holiday & Absence



#### Topic Headings

- [Purpose](#)
- [Location](#)
- [Viewing Holiday & Absence summary](#)

### Purpose

The Holiday & Absence screen is used to track all sick leave and holiday leave (*or annual leave*) which an employee may take.

### Location

1. Click on **WizHR** (*Outlook bar*)
2. Click on **Holiday & Absence**

*alternatively*

1. Click on **Employee** (*menu bar*)
2. Click on **WizHR**
3. Click on **Holiday & Absence**



## Viewing All An Employees Absences/Leave

The Details tab will display the most recent absence. If you wish to view a history of the employee absence/leave record, click on the List tab

The screenshot shows a software window with three tabs: 'Details', 'List', and 'Attachments'. The 'List' tab is active, displaying a table of employee absences. Below the table is a summary section for 'Holiday Allowance...'. Red lines connect text boxes on the right to specific data points in the interface.

| Start Date | End Date   | Category             | Reason           | Duration | Cost | Additional Cost | Annual Leave | Total (▲) |
|------------|------------|----------------------|------------------|----------|------|-----------------|--------------|-----------|
| 29/08/2003 | 02/09/2003 | Certified Sick Leave | Flu              | 5        | 1891 |                 | False        | 1         |
| 14/06/2003 | 14/06/2003 | Exam Leave           | CIPD Examination | 1        | 150  | 400             | TRUE         | 6         |
| 15/07/2002 | 19/07/2002 | Certified Sick Leave | Flu              | 5        | 1891 |                 | False        | 1         |
| 14/06/2002 | 14/06/2002 | Exam Leave           | CIPD Examination | 1        | 150  | 400             | True         | 6         |
| 10/06/2001 | 30/06/2001 | Annual Leave         |                  | 15       | 5673 |                 | False        | 5         |

**Holiday Allowance...**

|                               |       |  |
|-------------------------------|-------|--|
| Total Days Lost This Year     | 0.00  | <input checked="" type="checkbox"/> Include Annual Leave |
| % Days Lost This Year         | 0.00% |  |
| Total Days Lost Since Joining | 27.00 |  |
| % Days Lost Since Joining     | 1.77% |  |

**Holiday Allowance...**

|                             |    |      |
|-----------------------------|----|------|
| Holiday Allowance           | 40 | Days |
| Holiday Taken               | 0  | Days |
| Carried Over From Last Year | 5  | Days |
| Holiday Remaining           | 45 | Days |

The Annual Leave column indicates if the Leave/Absence was deducted from the employees Leave Entitlement.

False indicate NO, the absence was not deducted from Leave Entitlement

True indicates YES, the absence was deducted from Leave Entitlement

The Holiday Allowance section, gives you the Leave Entitlement Summary for the employee.

In this case, the employee has a total of 40 days leave entitlement

This holiday year (2004), the employee has not taken any annual leave

He/she carried over 5 holiday days from last year

He/she has 45 holiday days remaining for this holiday year

## Deleting an absence

The following instructions should only be used if you are not using WizTime.

1. Open the **Holiday & Absence** screen
2. Use the **Employee Navigation** toolbar to locate the correct employee
3. Use the **record navigation** toolbar to locate the absence record you want to delete
4. Click on the **Delete** button (sub screen toolbar)
5. Click on **Yes**



## Frequently Asked Questions:

- **How do I enter a Bank Holiday for every employee?**

### Entering Bank Holiday for all employees (Using WizHR)

- Open the **Holiday and Absence** screen
- Click on the **Global Up** button (sub screen toolbar)
- Select **Update all employees**
- Click on **OK**
- Select an **Absence Type** (i.e. Holiday)
- Select a **Type** of absence (i.e. Bank Holiday)
- Select a **Start** and **End Date** (these will be the same)
- The **duration** field will automatically calculate the duration of absence
- Select a **Reason** (e.g. Company Holiday)
- Click on **Save**
- Wait a few moments for WBS to enter the holiday in all employees holiday and absence records

### Entering Bank Holiday for all employees (Using WizTime)

Bank Holidays are entered retrospectively

- Open the **Historical Absences and Lates** screen (WizTime Outlook bar)
- Click on the **Settings** tab
- Under **Please select the criteria to base you search on**, select **All**
- Under **Dates**, in the **From** and **To** date, select the date the Bank Holiday occurred on
- Under **Global Update**:
  - Ensure **Paid** is ticked (if employees are being paid for this Bank Holiday)
  - Select **Holiday** from the **Category** drop down list
  - Select **Bank Holiday** from the **Type** pick list
  - Select a **Reason** (e.g. Company holiday)
  - Ensure **Deduct from Leave Allowance** is not selected
  - Click on **View** (sub screen toolbar)
  - Right click anywhere in the screen and click on **Select All**
  - Check the **Global Update** check box (bottom of the screen)
  - Click on **Holiday** (sub screen toolbar)
  - Click on **Yes**
  - Wait a few moments while WBS inserts the Bank Holiday record into each employees file
- **How do I enter Annual Leave/Holiday (*I am not using WizTime*)?**
  - Open the **Holiday & Absence** screen
  - Use the **Employee Navigation toolbar** to locate the employee you want to add the annual leave for
  - Click on **Add** (sub screen toolbar)
  - Select **Absence** from the **Category** pick list
  - Select **Annual Leave** or **Holiday** from the **Category** pick list
  - Select a **Start Date**

- Select an **End Date**
- The Duration field should automatically calculate the length of absence.
- Click on **Deduct Days Lost from Leave Allowance**
- Click on **Save** (sub screen toolbar)
  
- **How do I enter Annual Leave/Holiday (*I am using WizTime*)?**
  - Open the **Employee Week** screen
  - Use the **Employee Navigation toolbar** to select an employee
  - Click on **Absence** (sub screen toolbar)
  - Select **Annual Leave** from the **Type** pick list
  - Key in a **Start date** and **time** (i.e. the normal starting time for the employee on that date.  
Use the **Get Expected** button if you are unsure of the start time)
  - Key in an **End date** and **time** (i.e. the normal ending time for the employee on that date. Use  
the **Get Expected** button if you are unsure of the end time)
  - The **Duration** field should automatically calculate the length of absence
  - Ensure that **Deduct from Leave Allowance** is selected
  - Click on **OK**
  - Wait a few moments for WBS to enter the Annual Leave for this employee
  
- **How do I see how much annual leave an employee has left?**
  - Open the **Master Details** screen.
  - Use the record navigation toolbar to locate the employee
  - Click on the **Leave** tab
  - The employees remaining holiday entitlement is located in the **Leave Remaining** field
  
- **An employee takes annual leave/sick leave in hours and not days, how do I handle this?**

Whether the Holiday and Absence screen calculates an employees absence in hours or days will depend on the holiday scheme which has been applied to the employee.

If an employee takes their absence in hours, change that employees holiday scheme in the Master Details > Leave tab.

If you do not have an hourly holiday scheme created, open the Company > Holiday Configuration > Holiday Schemes and create one. Then assign that scheme to the employee.

- **How do I deduct service days?**

Service days are days are reckonable for pension purposes. For instance, if an employee goes on career break, this time will not be counted as towards service.

You may view an employees service record on the **Master Details > Dates** tab. The **Length of Service** field indicates service in years and months. The **Days Served** field, indicates service in days.



**Note:**

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If the Days Served field is red, this figure may not be accurate. To get an accurate figure, click on **Preferences > System Preferences > Service** tab > place a tick beside **Keep Service Days Current** > **OK**.

---

### To deduct service days (Using WizHR)

- Open the **Holiday and Absence** screen
- Click on the **Add** button (sub screen toolbar)
- Select a **Category** (e.g. Absence)
- Select a **Type** (e.g. Career Break)
- Select a **Start Date** and **End Date**
- The **Duration** field will automatically work out the duration of absence
- Select a **Reason** (e.g. approved leave)
- Click on **Deduct from Service Days**
- Key in any additional **notes**
- Click on **Save**

### To deduct service days (Using WizTime)

- Open the Employee Week screen (WizTime Outlook bar)
- Navigate to the appropriate employee
- Click on the Absence button (sub screen toolbar)
- Select a **Type** (e.g. Career Break)
- Select a **Start Date** and **End Date**
- The **Duration** field will automatically work out the duration of absence
- Select a **Reason** (e.g. approved leave)
- Click on **Deduct from Service Days**
- Key in any additional **notes**
- Click on **Save**

- **When I try to add an Absence/Holiday record for an employee a warning message appears:  
"You must assign a valid holiday scheme to this employee!"**



In this case the employee has not been given a holiday scheme. This is one of the mandatory fields in WBS.

To assign a holiday scheme to an employee, follow the steps below: -

- a. Open the *Master Details Employee Details* screen
- b. Navigate to the employee who is missing a holiday scheme
- c. Click on the **Leave** tab
- d. Click on the **Edit** button (sub screen toolbar)
- e. Click on the drop down arrow to the right of **Scheme** and select a holiday scheme from the list of available schemes