Leave – A user guide

Your Annual Leave Entitlement

Entitlement is only deducted when annual leave is requested, as opposed to appointments, study or compassionate leave (others are available at you company's discretion and can be set to deduct from entitlement).

The period of time your entitlement is valid for is called the 'leave year'. The 'My Current leave Year' box at the top of the Dashboard has a note of your unused entitlement for that year. The link in that box will show a more detailed breakdown of your entitlement.
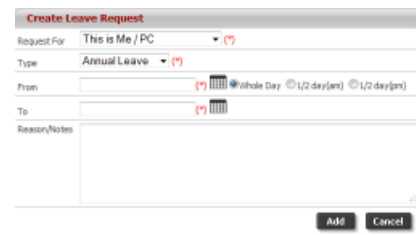

To see this in more detail go to My details > Leave (dropdown) > Current Year.

Leave already requested

'My Future Leave Requests' on your Dashboard shows a list of your own leave that occurs in the future. A list of leave that falls in the past can be found in My details > Leave (dropdown) > Requests > Completed.

To Request Leave

Go To Actions > Leave > Create Leave Request. Select the type of leave you wish to request (this list can be edited at Admin > System Functionality > Leave > Absence Types). Add the start and finish dates of the request and click Add (IMPORTANT: The request is still in draft and for your eyes only).

It is here that you can check the details of the request and alter the duration by clicking Change. When you are happy to proceed you must 'Submit for Approval'. Alternatively you can 'Withdraw Request'.

To withdraw leave after it has been sent for approval

On your Dashboard you will see a box titled – 'My Future Leave Requests'. Select the Absence Ref for the request you wish to withdraw. Click the 'Withdraw Request' button. Only leave that occurs in the future can be withdrawn.

To Approve the request (Manager)

When a request is made by a member of a group that you manage you will be expected to approve that request. No other extra permissions are needed to be able to manage members of your group.

Any requests waiting for approval will be shown on the Dashboard under the title 'Absence Requests To Be Approved' and an email will be sent to you as well.

Click on the Absence Ref to open the approval page. A summary of the rules (for which the detail is found at the bottom of the page) and a Group calendar can be used to help you make an informed decision. This can be done by selecting either APPROVE or REJECT In the Approval Decision box.

Cancelling Leave (Manager)

If you need to cancel leave and haven't approved it yet you should REJECT it.

If it has been approved and is still in the future then a Manager of a group should go to My details > Groups > employee name (under 'User Managed in Groups') > Leave. Then select the Absence Ref to be cancelled. The Approval Decision box is shown by clicking the Approval status hyperlink. To cancel, change the requests decision from Approved to Cancel Request and click Submit.

Controlling leave entitlement (Admin)

To add or deduct entitlement go to People > employee > Leave (dropdown) > Leave Years. Choose the year to make the adjustment in. Complete the form at the bottom of the page in EITHER minutes or days as required.

Some adjustments can be automated such as year on year adjustments, service awards and/or carry over.

Adding Leave Rules (Admin)

Leave rules are powerful checks made when someone requests leave. They help ensure your business continuity. Go to Admin > System Functionality > Leave > Absence Rules to see a list of available rules. Rules are either one-offs or copyable templates. Click the one-off names to edit them or the Copy link to create a new rule from a template.

Killing Leave (Admin)

When leave occurs in the past it is locked and impossible for anyone except an Administrator to remove. To Kill any leave but especially leave that occurs in the past, go to Admin > System Functionality > Leave > Kill Record. You will need to know the employee to which the leave belongs and the numerical part of the Absence Reference (e.g. AR001234 = 1234)