

Getting started made easy!
A short introduction to

TimeTac *Leave Management*

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Holiday Planner Overview

» Manager and User Accounts

Display the Holiday Planner

You will find the Holiday Planner in the side menu **1**, as well as via the tab menu **2**.

Holiday Planner Overview

Paperwork is a thing of the past: the TimeTac Holiday Planner allows you to quickly apply for holidays and other absences.

The overview **3** automatically shows your current entitlement. One click is sufficient, either on Request Leave Day **4** or Request Other Absence **5** to apply for time off. In the Annual calendar **6** and Department calendar **7**, you can easily see all public holidays and other absences so that you can optimally plan your time away from the workplace. Manage Requests **8** shows a record of all requests that you have made.

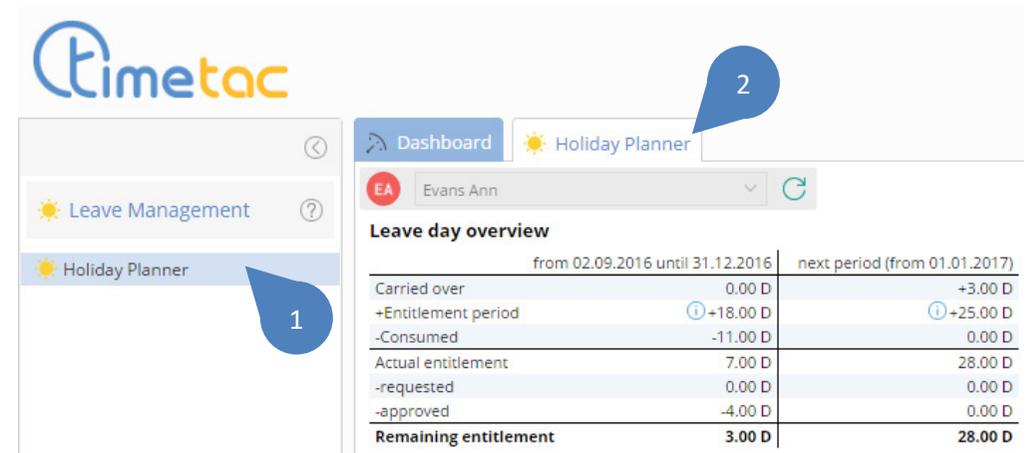


Figure 1: Holiday Planner

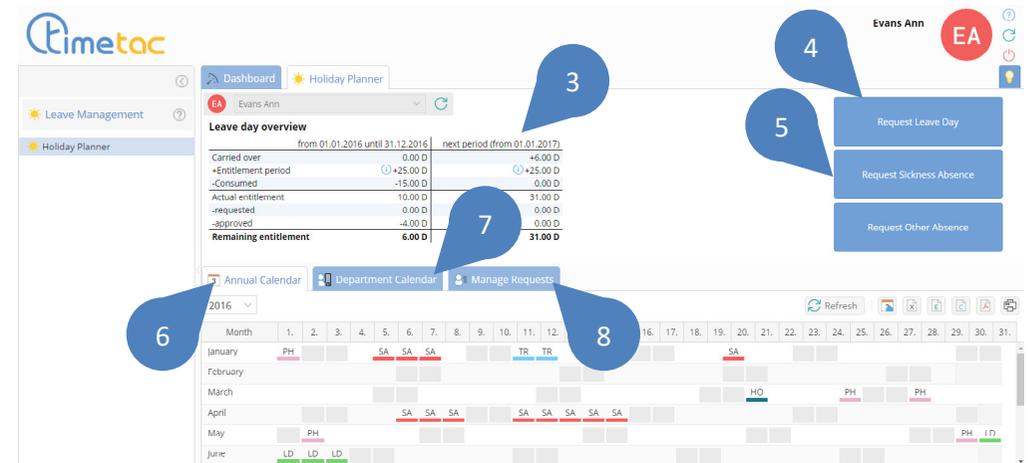


Figure 2: Holiday Planner Overview

Request Leave

Click on Request Leave Day **1**, to apply for annual leave. With the help of the start and end dates **2**, specify the time frame that you would like to request. The duration **3** will be automatically calculated. If you wish, you can leave a comment **4**, then click Request **5** to finish. You can also right-click **6** on a specific day within the Annual Calendar to request time off.

Tip: Once a leave request has been processed for you by your relevant manager, a notification will appear on your dashboard.

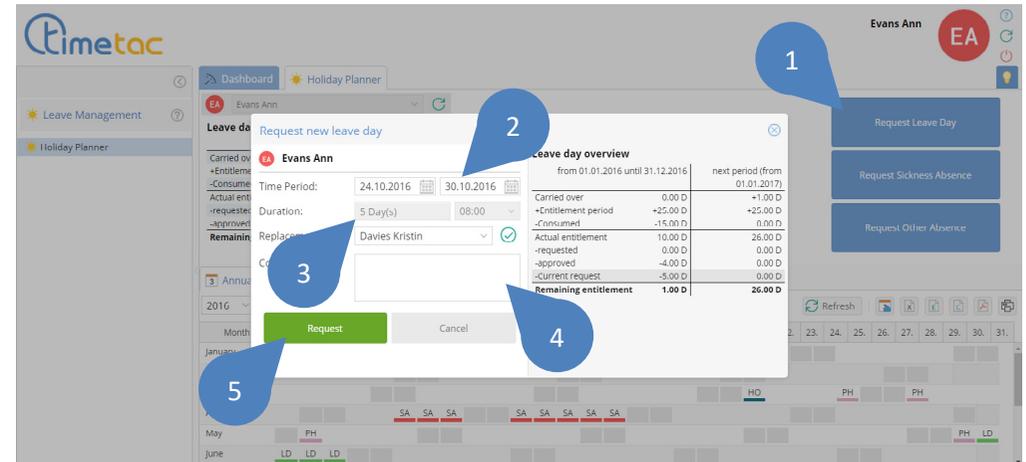


Figure 1: Leave Request

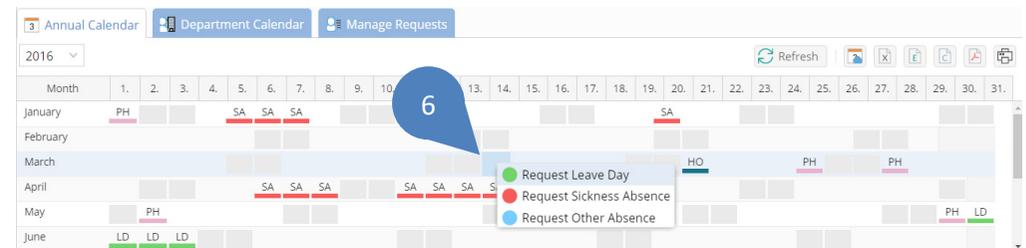


Figure 2: Request in the Annual Calendar

Other Absences

» Manager and User Accounts

Request Other Absence

TimeTac also allows you to manager other absence types. Click on Request Other Absence **1**, selecting the type of absence from the dropdown menu **2**. The duration is automatically calculated once a time frame **3** of more than one day is defined. You can optionally enter a comment if desired **4**. Click on Request **5** to finish. You can also right-click on a specific day within the Annual Calendar **6** to request an absence.

Tip: To configure the absences available to your company, please get in touch via support@timetac.com

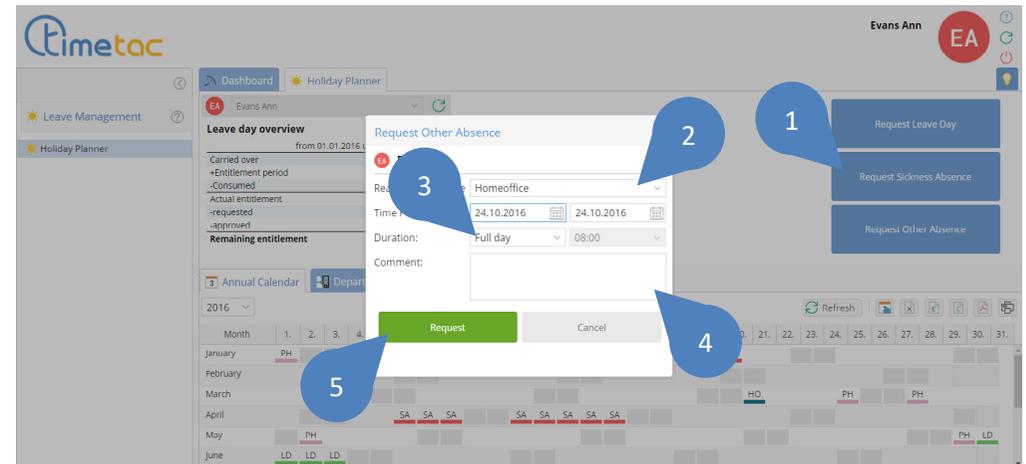


Figure 1: Other Absence Request

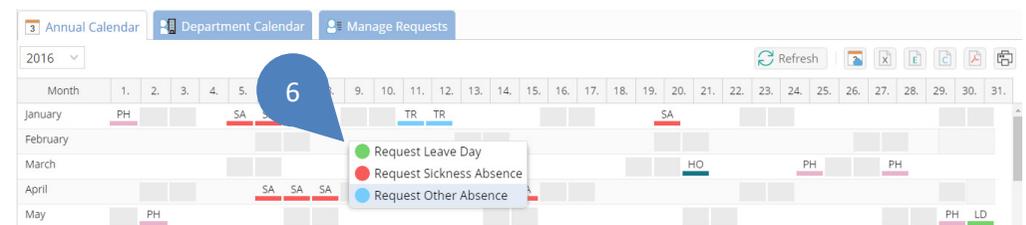


Figure 2: Request in the Annual Calendar

Request Management

» User Accounts

The request management feature provides you an overview of all previously requested leave days and other absences. You can obtain the entire history of your requests from here.

Display Requests

Select tab Manage Requests **1**. You will see an overview of all previous requests, including their status. Click on the magnifying glass **2** to see the details of any request. You also have the ability to filter and sort the data via the column headings **3**. The displayed columns can be customised via the dropdown selection menu **4**.

Cancel Request

You can cancel an already requested absence with a click on Cancel Request **5**. An already processed request can usually only be cancelled by your manager.

Delete Request

To delete a request which has not been processed, select the relevant request and click Delete **6**.

Tip: Employees can be granted the permission to cancel their own requests from within the User Management menu.



The screenshot shows the 'Manage Requests' tab selected. Callout 1 points to the 'Manage Requests' tab. Callout 2 points to a magnifying glass icon. Callout 3 points to the column headers. Callout 4 points to a dropdown menu for column selection. Callout 5 points to the 'Cancel Request' button. Callout 6 points to the 'Delete Request' button. The table below shows a list of requests with columns for Request ID, Request Type, Applicant, Comment, Process date, Processed by, Replacement, Notes, Period, Duration, and Status.

Request ID	Request Type	Applicant	Comment	Process date	Processed by	Replacement	Notes	Period	Duration	Status
24.10.2016	Leave Day	Robert M...	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Walker M...	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Wright Carrie	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Robinson Bret	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Thompson Grace	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	White Lara	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Edwards Gerald	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Blank Robert	Christmas Holiday ...		Blank Robert			24.12.2016 until 31.12.2016	3 Day(s)	accepted
24.10.2016	Leave Day	Evans Ann						31.10.2016	1 Day(s)	open
24.10.2016	Training	Evans Ann			Blank Robert			20.07.2016	1 Day(s)	accepted
24.10.2016	Sickness Abs...	Evans Ann			Blank Robert			05.01.2016 until 07.01.2016	3 Day(s)	accepted
24.10.2016	Sickness Abs...	Evans Ann			Blank Robert			20.01.2016	1 Day(s)	accepted

Figure 1: Manage Requests

The screenshot shows the 'Details' view for a user. It includes a 'Leave Management' section with the following fields and values:

- Read more in the Knowledge Base: [?]
- Leave entitlement per period*: 30
- Entitlement interval*: per year
- Next entitlement*: 01.01.2017
- Allow cancellation of leave day requests:
- Leave entitlement initial value*: 24
- Leave entitlement exit value*: 0
- Leave Entitlement Record: [icon]
- Buttons: pro rata entry, pro rata exit

Figure 2: User Management

Annual Calendar

» Manager and User Accounts

TimeTac offers you an overview of absences per calendar year. Absences are individually displayed as leave days, sickness absences or other absences. Public holidays relating to specific countries are already included in TimeTac.

The annual calendar shows you the absences of a specific employee in an overview for the whole year.

Display the Annual Calendar

In the Leave Day Planner, click on the Annual calendar **1** tab and select the desired year **2**. Approved absences are displayed with a solid underline **3** for the respective day, whereas those which are yet to be processed will be displayed with a dashed line **4**. The Annual Calendar data can be exported to .XML, .XLS, .CSV and .PDF formats **5**. It can also be exported as a read-only .ics for use in other calendar applications.

Tip: Employees only have access to their own Annual Calendar, whereas managers can see the Annual Calendar of each employee within their department.

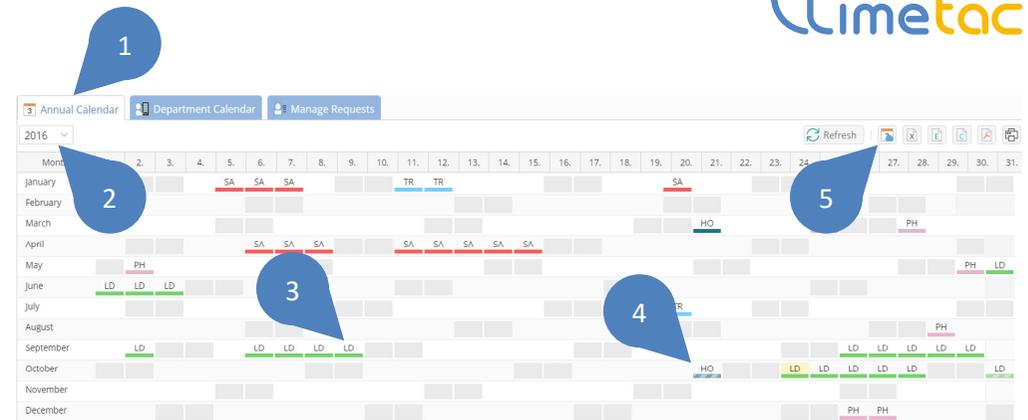


Figure 1: Annual Calendar

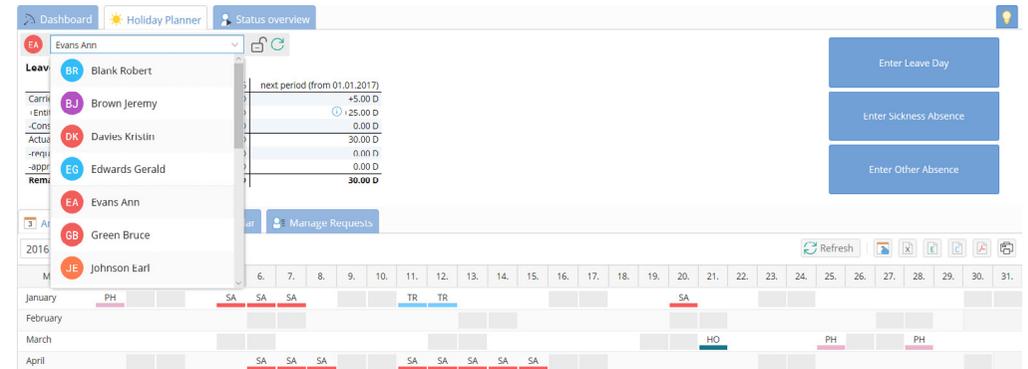


Figure 2: Annual Calendar Employee Selection

Department Calendar

» Manager and User Accounts

It is important to know who is where and when to plan effectively. This is not a problem with the department calendar: The department calendar displays all absences for the employees in a department in a monthly overview.

Display the Department Calendar

In the Holiday Planner, click on the Department Calendar **1** tab, and select the desired month **2** and year **3**. You can choose one of two display options via the dropdown menu **4**: whether a single month should be displayed, or whether an overlapping display, inclusive of the previous and upcoming months should be shown. The entire Department Calendar can be exported as .xml, .xls, .csv or .pdf formats **5**.

Tip: As a user or department leader, you only have access to the department calendar of your respective department by default. Managers with Full Employee Access can see the department calendars for all employees within the account.

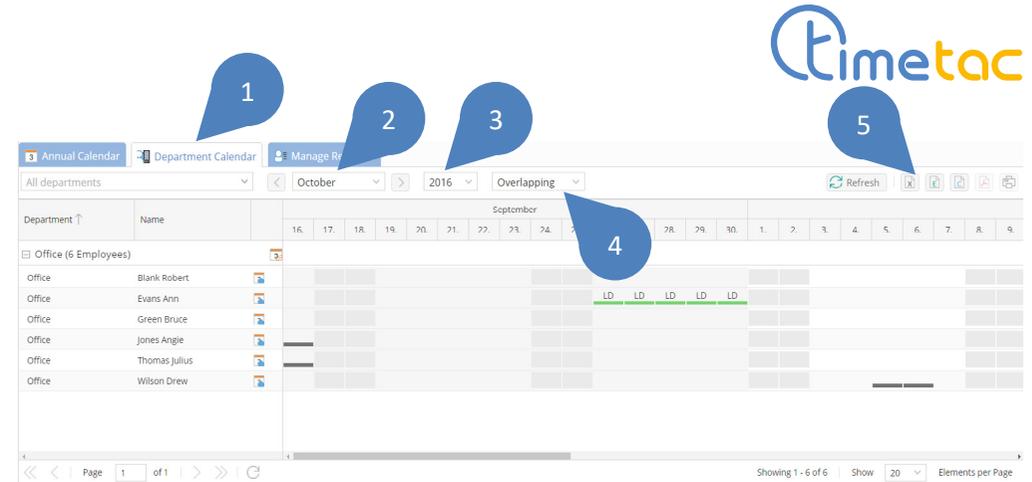


Figure 1: Department Calendar

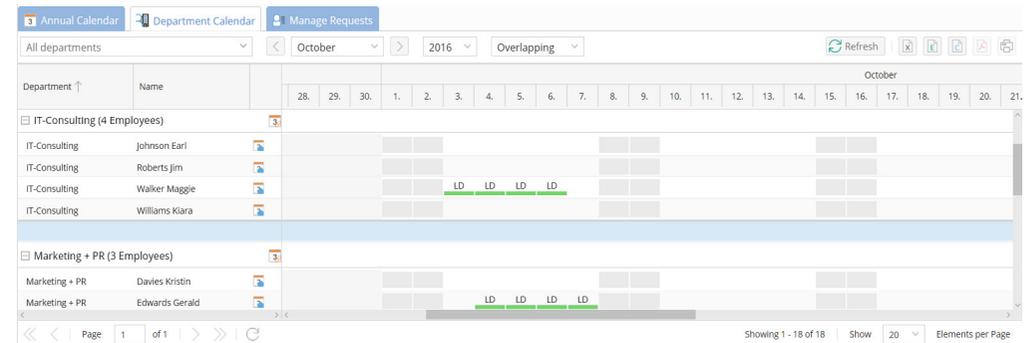


Figure 2: Department Calendar with Full Employee Access

» Manager Accounts

In Manage Requests, you can conveniently accept or reject requests for time off. As soon as a request has been processed, the respective employee will receive a notification on their dashboard.

Accept/Reject Requests in the Detailed View

To see a request, simply click on the magnifying glass **1** in the relevant line. You can see all the details of the request, leave a comment **2** if desired, and then accept **3** or reject **4** a request with a simple mouse click.

Accept/Reject Requests in the Overview

To quickly process requests, click on the symbol for reject **5** or for accept **6** whilst in the overview.

Note: A manager can see and process requests for their assigned employees. Users can only see their own requests.

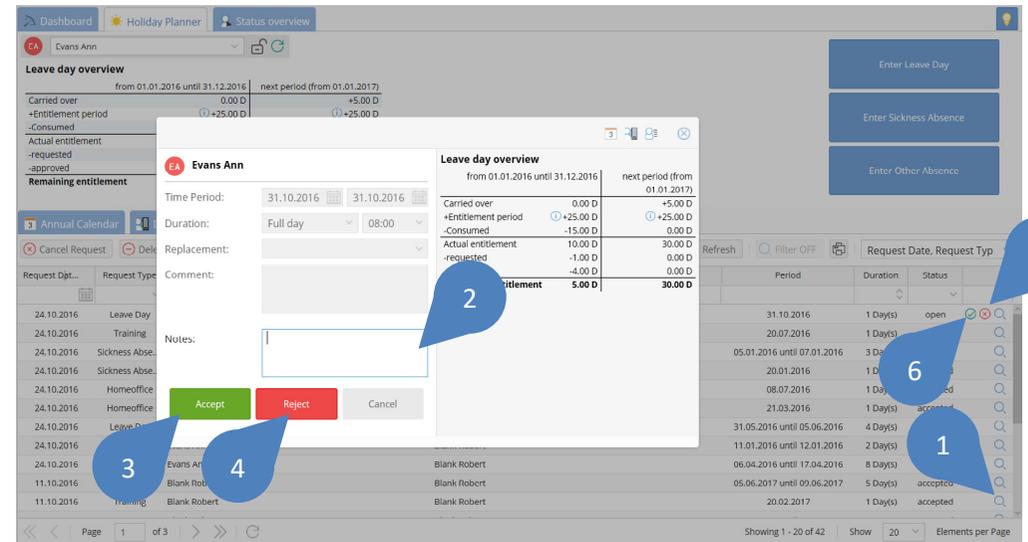


Figure 1: Manage Requests

» Manager Accounts

Numerous, already prepared holiday calendars from different countries can be found within the Settings menu **1**. Click on Public Holidays **2** to view the available templates which you can then assign employees to (see chapter entitled User Management).

Display Public Holiday Calendar

To see the holidays of a particular calendar, first select the country **3**, then the relevant template **4** with a mouse click. The rightmost window **5** will now display all the public holidays of that calendar.

Edit Public Holiday Calendar

To edit a particular holiday calendar, select it with a mouse click. The rightmost window will display all of the holidays in that calendar. You can add a new holiday by clicking on Add **6**. To delete a holiday, first click on the desired holiday, and then on Delete **7**. To edit a holiday, double click on the specific value and simply overwrite it.

Create a New Public Holiday Calendar

To create a new public holiday calendar, click on Add **8** in the centre column. Double click on the newly created blank line and type a desired name for the new calendar. You can conveniently add new public holidays to your calendar by clicking on Add in the rightmost window.

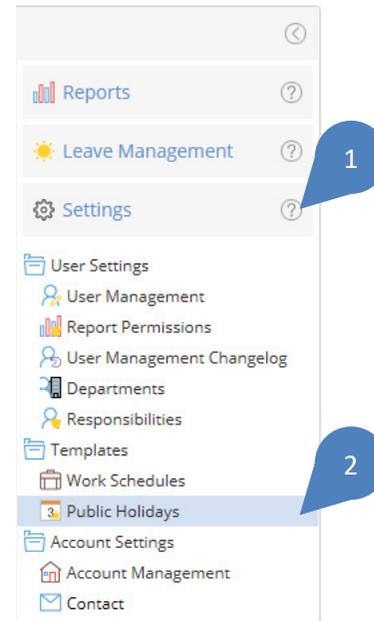


Figure 1: Public Holidays Menu

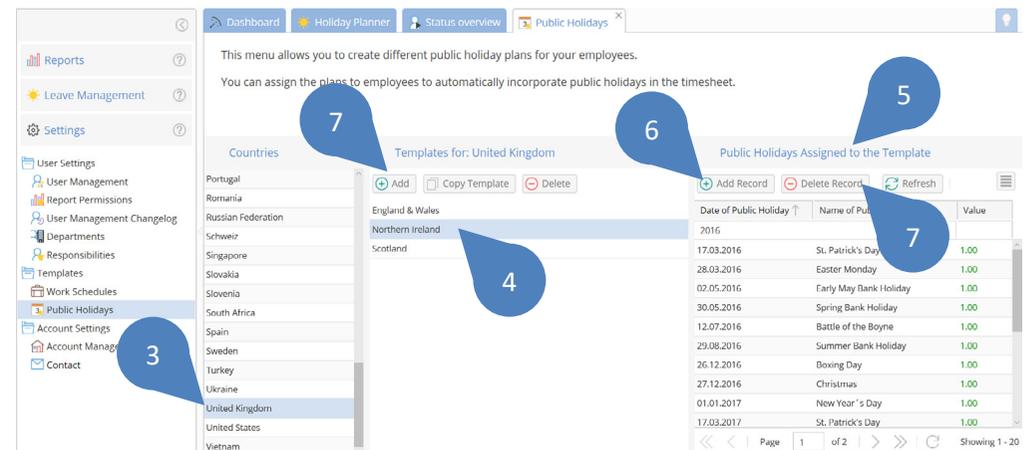


Figure 2: Public Holidays Overview

Change User Settings

You can find all the settings for Leave Management under Settings > User Management **1**.

Select the desired employee and the side menu will automatically open **2**. Expand Leave Management by clicking on the arrow **3**. You can now modify the following settings:

- Leave entitlement per period **4** and Entitlement period **5**:
You can enter the amount of leave entitlement per period here. Entitlement interval allows you to switch between monthly or yearly allocations.
- Next entitlement **6**:
Provide the date for when the next entitlement will begin. Leave entitlement will be calculated automatically in the future.
- Allow cancel leave request **7**:
You can decide whether a user has the ability to cancel their own absence requests after they have been processed, or whether a manager must do so.
- Leave entitlement initial value **8**:
Input the employee's current entitlement here. This is the amount of entitlement from beginning to use TimeTac, until the date of the „Next entitlement“ **6**.

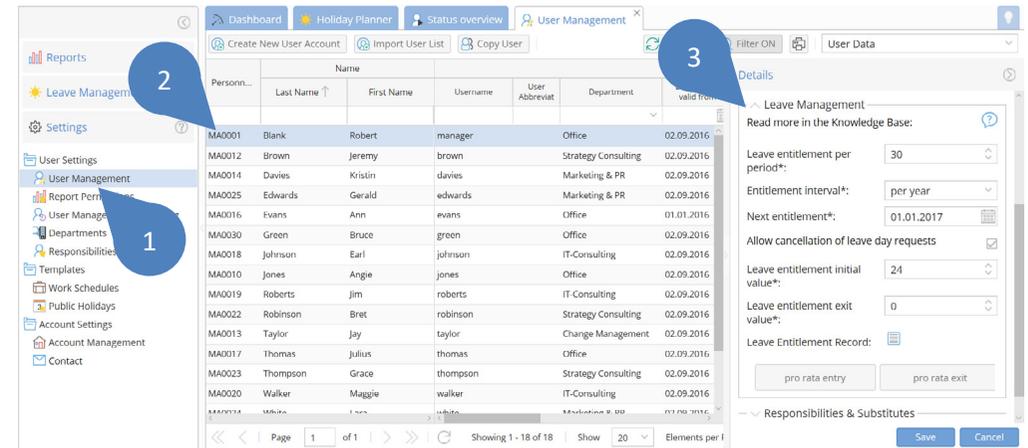


Figure 1: User Management

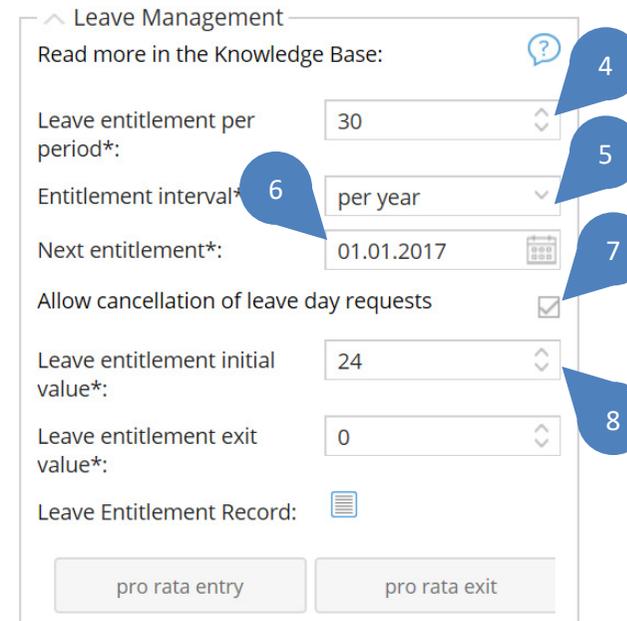


Figure 2: Leave Management in User Management

Departments

» Manager Accounts

You can create and manage your department structure within TimeTac, providing a correct representation of how your company operates.

Create Department

Click on Add Department **1** and double click in the newly created department within the main display; you can now provide a desired name **2**. You can assign any manager within TimeTac to be the Department Leader or Assistant Leader **3** for a department via the respective dropdown menus. If you wish to make the Department Leader responsible for processing all types of request, then simply click on the folder icon **4**.

Delete Department

You can delete a department by first selecting it within the main display, then clicking on Delete Department **5**.

Further Options

Hovering the mouse cursor over the info icon **6** will display the employees within this department. You can activate and deactivate departments by clicking on the icon within the Status column **7**.

Note: Departments can only be deactivated when all assigned employees within the department have also been deactivated.

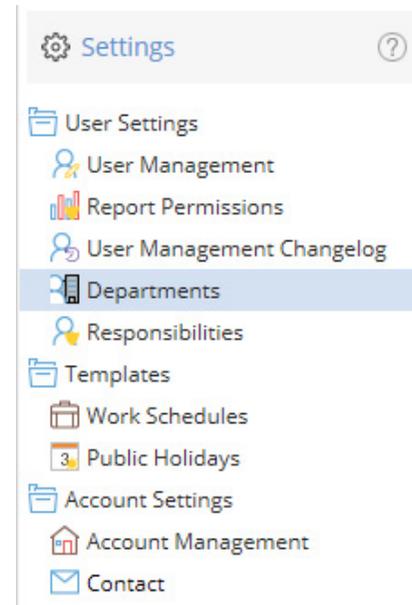


Figure 1: Departments

The image shows a table with columns: Name of Department, Status, Department Leader, and Assistant Leader. There are also buttons for 'Add Department' and 'Delete Department'. Numbered callouts point to specific elements: 1 (Add Department), 2 (Department name input), 3 (Department Leader dropdown), 4 (Folder icon), 5 (Delete Department), 6 (Info icon), and 7 (Status icon).

Name of Department	Status	Department Leader	Assistant Leader
Office	✓	Blank Robert (manager)	
Marketing & PR	✓	Davies Kristin (davies)	
Accounting	✓		
HR	✓		
IT-Consulting	✓	Williams Kiara (williams)	
Change Management	✓	Blank Robert (manager)	
Strategy Consulting	✓	Brown Jeremy (brown)	

Figure 2: Departments Overview

Responsibilities

» Manager Accounts

You can specify the person or persons responsible for processing absence requests within each department.

Columns

The name of each department can be found under the Department column **1**. Within each department, we can see defined roles **2**. These are Department Leader, Assistant Leader, Manager and User. You can define responsible persons for each role within a department.

Responsibilities

You can assign responsibilities via a dropdown menu **3**. Hovering over the neighbouring info icon **4** shows the employees which fall under this role within this department.

Further Options

You can customise which columns are displayed in this view via the dropdown menu in the upper right corner **5**.

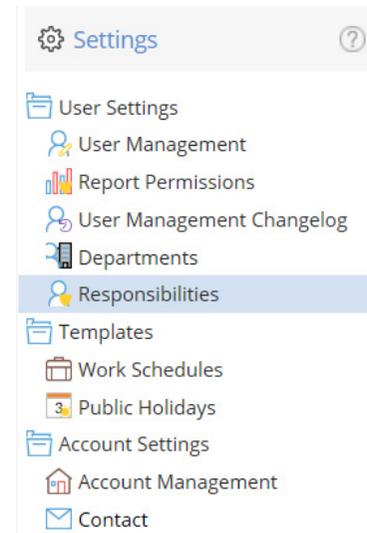


Figure 1: Responsibilities

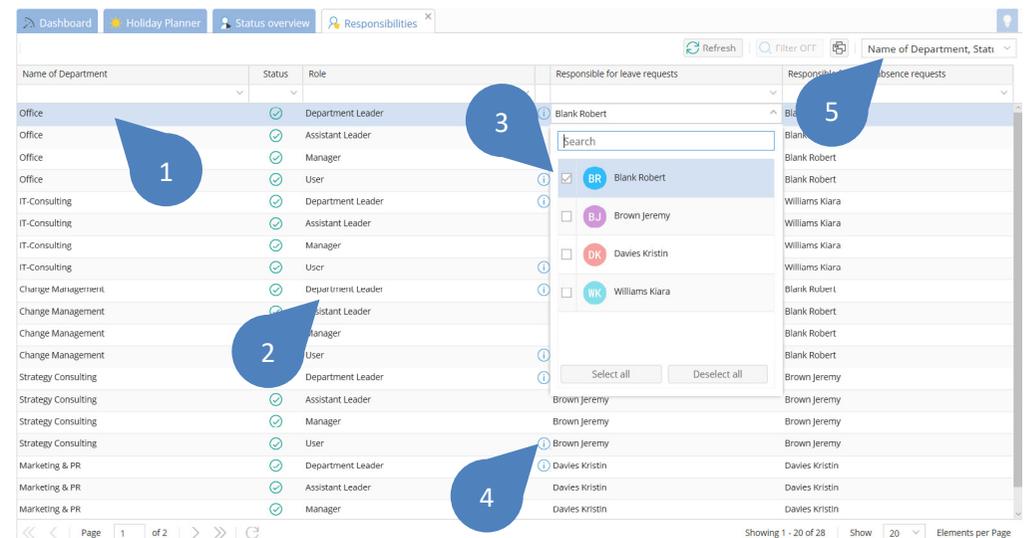


Figure 2: Responsibilities Overview

Holiday Restriction

» Manager Accounts

You can define a restriction on holidays within Leave Management – Holiday Restriction **1**.

Click on Add Record **2** to create a new restriction rule. To copy an existing restriction, simply select it and click Copy Template **3**. You can delete a restriction in the same manner by selecting it and clicking Delete Record **4**. You can specify the following options for each restriction:

- **Department 5**:
You can select the applicable department for this restriction from the dropdown menu.
- **Comment 6**:
Define a reason for this holiday restriction by double clicking in this cell.
- **Start Date 7**:
You can define the start date of this restriction via manual input or via selecting a date by clicking on the calendar symbol.
- **End Date 8**:
Define the end date of the restriction as per the methods for the start date.

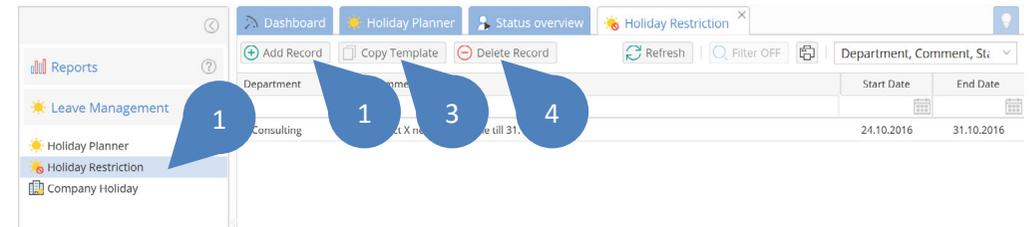


Figure 1: Holiday Restriction

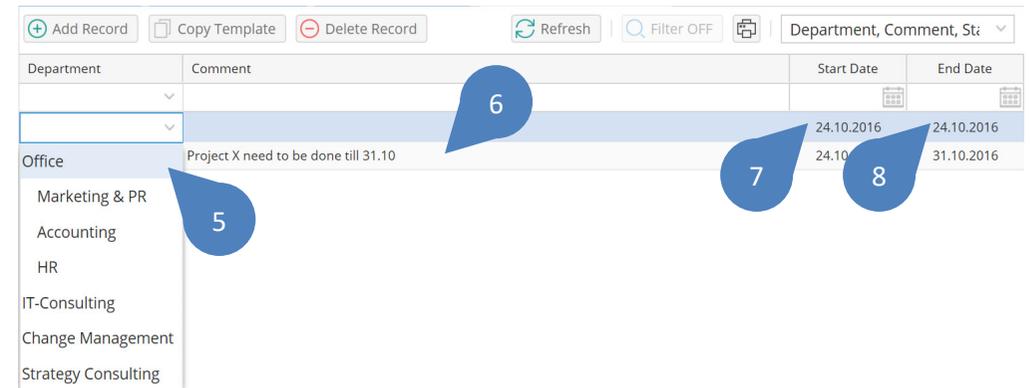


Figure 2: Holiday Restriction Overview

» Manager Accounts

You can define a company closure or holiday within Leave Management – Company Holiday **1**.

Define a Company Holiday

Click on Add Company Holiday **2** to create a new company holiday. You can delete a company holiday in the same manner by selecting it and clicking Delete Record **3**. You can specify the following options for each company holiday:

- Request Type **4**:
Select the applicable type of request to be applied via this dropdown menu.
- Time Frame **5**:
Select the applicable time frame using the calendar fields for the start and end dates.
- Department **6**:
You can select the applicable department for this holiday from the dropdown menu.
- Comment **7**:
Optionally provide a reason for this holiday by double clicking in this cell.

Click on Enter **8** to complete this request.

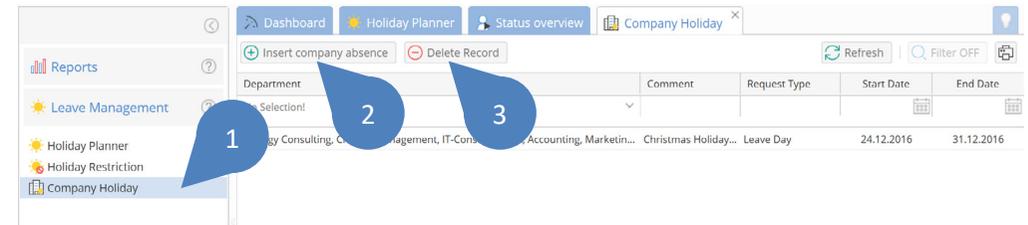


Figure 1: Company Holiday

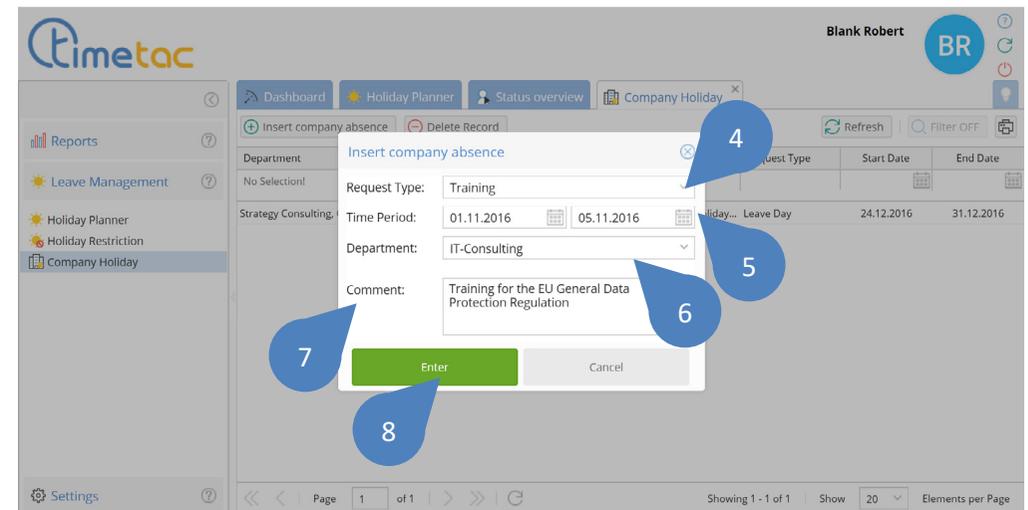


Figure 2: Company Holiday Creation

Display Reports

You can view statistics for all requests within the Reports menu **1**. You can select a predefined display of the current day, week or month using these buttons **2**. All of this data can be exported as .XML, .XLS, .CSV or .PDF formats **3**.

The following can be defined for further filtering options:

- **Date **4****: Specify the desired start and end date for this report using these fields.
- **Report **5****: Select the type of report which should be displayed. Those available within the Leave Management product are Employee Statistics, Department Statistics and Absence Statistics.
- **Department **6****: You can further define which department or departments are included in the selected report.

Click on Display **7** to view the report.

Tip: Which reports are available to employees can be defined within Report Permissions, found within the Settings menu.

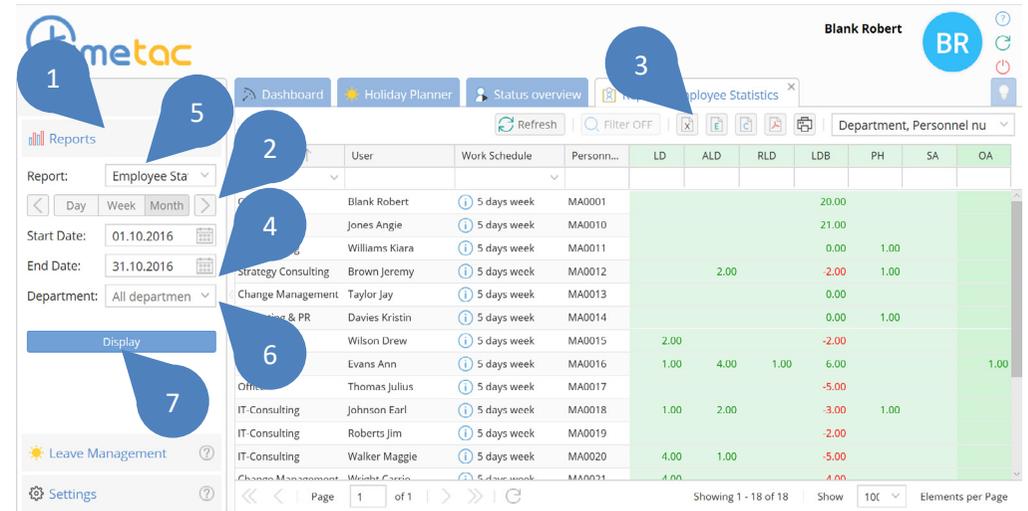


Figure 1: Reports

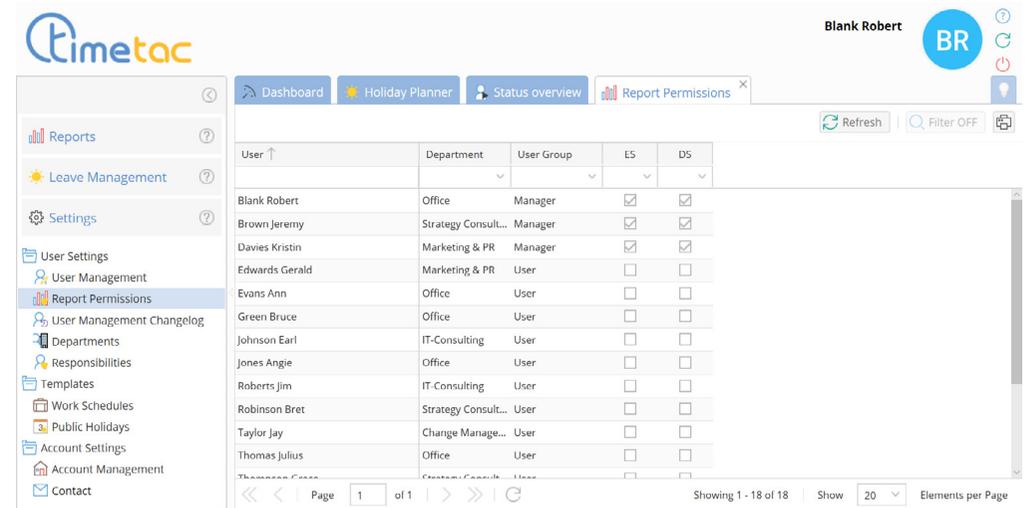


Figure 2: Report Permissions