Installation Guide

The Holiday System

Harveys IT
www.harveys.it  Est 1996
Signup to the holiday system at www.theholidaysystem.biz/signup
Complete your companies details as shown in the example:

Step 1

Holiday System

Please complete form below to signup to The Holiday Booking System

Company Name: The Holiday System
Address: 1 Morton Terrace Gainsborough
Post Code: DN21 2RF
County / State: Lincolnshire
Country: United Kingdom
tel: 0330 333 9090
Email address: Manager@theholidaysyter
Please enter start date of your holiday year: 01/01/2013
Rollover Limit(Days): 5
Default Yearly Leave: 25

We will now setup up your first user account. This will be the HR Admin account. (This can be changed later)

Name: Richard Harvey
Email address: Hrmanager@theholidaysyter
Password: *********
Password confirm: *********

You will be able to change any of the details when you have logged in.

I agree to Harveys IT Ltd standard terms and conditions. *Click here*

Create Account Now
**Explanation**

Please enter the first day of your holiday year. If today is 30th Oct 2013 and your holiday year runs 1st Jan to 31st Dec. enter 01/01/2013

Roll over limit. This is the max number of days that an employee can carry over to the next holiday year.

Default yearly leave. This is the default number of days used. This can be amended as each member of staff is setup.

Now we setup the first account. This should be the HR Manager.

When completed you will get this confirmation screen.

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**Signup for a Holiday Booking System**

**Congratulations**

Your Holiday system has been successfully set up. Click [here](#) and log in with your email address (Hrmanager@theholidaysystem.biz) to begin.
Step 2

Login as the HR Manager with the email and password you entered on the signup screen.

Please login

Click here to have your password sent to your email address.

Email: hrmanager@theholidaysy
Password: *******

Sign In
You will be taken to the HR Manager home screen. This will also show you the HR Managers holidays.

From this screen you will administer all the functions of the holiday system have a look through the menus, most of them will be empty, however they will soon fill up when someone books a holiday.
Create your first group manager. The group manager is a non-HR manager who will approve holiday requests for their staff that report to them. The system uses a hierarchy structure. In this example Richard Harvey is the HR Manager, so he is the only person in the list, until you add some managers.

The HR manager can see all staff records. The managers can only see limited data for their staff. You can change the manager / HR manager at any time for individual staff.
To create a user, go to staff details and choose "Add a new member of staff". Enter the details for this member of staff. Note you can set the leave for the current year. Press create.
You will then be taken to the user details where you can amend holiday entitlements and make the user a manager.
TIP create all HR users and Managers first.
When you update a record, you will get a green banner that says "changes saved" this is your confirmation the action has worked correctly.
Some of the options are a selection list. Choose the information you require and then update.

<table>
<thead>
<tr>
<th>General Info:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>James Brown</td>
</tr>
<tr>
<td>eMail</td>
<td><a href="mailto:manager@theholidaysystem.biz">manager@theholidaysystem.biz</a></td>
</tr>
<tr>
<td>Country</td>
<td>England</td>
</tr>
<tr>
<td>Manager</td>
<td>Richard Harvey</td>
</tr>
<tr>
<td>Attributes</td>
<td>Manager ☑ HR Supervisor ☐</td>
</tr>
<tr>
<td>Annual Leave '13</td>
<td>25 ± 0 = 25</td>
</tr>
<tr>
<td>Leave '14</td>
<td></td>
</tr>
<tr>
<td>Available</td>
<td>25 ± 0 = 25</td>
</tr>
<tr>
<td>Pending</td>
<td>0</td>
</tr>
<tr>
<td>Booked</td>
<td>0</td>
</tr>
<tr>
<td>Report Scope</td>
<td>Company Default</td>
</tr>
<tr>
<td>Leave History</td>
<td></td>
</tr>
<tr>
<td>Full History</td>
<td>click</td>
</tr>
</tbody>
</table>

Add a New Member of Staff  Retrospectively Enter Leave  Export to Excel
Now create your next member of staff. You will be able to choose the manager they report to. This can be changed at a later date if required.
You can also choose if the user gets a weekly report showing who in their group is on holiday over the next 4 weeks.
If you amend a users holiday entitlement it is shown in the reports as an audit trail.
The holiday system comes free of charge with 4 users to allow you to test. You will always get 4 free users in the future, you only pay for additional users. If you exceed the 4 users, you will be asked to upgrade the system and pay for the additional users.

New Staff Member

You cannot add any more users because you have reached your licensed limit. Please go to the company section and add / upgrade your subscription. If you have retired a member, you can delete them to re-use their license.
To add more users, go to the company tab. Here will be shown all your company details. Choose “Renew / Add more users”

You will then get the option of how many users you wish to add, these are purchased in block of 5 and are calculated to the end of your current holiday year. The charge is £1.80 per user per year or pro rata if less than 12 months to your year end. Please only purchase the minimum number of users required at a time as unused users are not carried over at the end of the year.

Subscribe

Subscribe for 10 users for 1 years up to Thu Oct 30 2014

Order Total : £18.00

Proceed to Order Summary
You will be asked to confirm your company information

Please confirm / Update the following details

*First Name(s): Richard

*Surname: Harvey

*Address Line 1: 1 Morton Terrace

Address Line 2: Gainsborough

*Cty: Lincolnshire

*Pst/Zip Code: DN21 2RF

*Country: United Kingdom

State Code (U.S. only): Please select...

Phone: 0330 333 9090

e-Mail Address: Manager@theholidaysystem.biz

Back Proceed

And the amount that is due to be paid

Order Confirmation Page

Your Basket Contents

<table>
<thead>
<tr>
<th>Title</th>
<th>Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday System</td>
<td>0.15 GBP</td>
<td>120</td>
<td>18.00 GBP</td>
</tr>
</tbody>
</table>

Total: 18.00 GBP

Your Billing Details

Customer Name: The Holiday System

Name: Richard Harvey

Address Details: 1 Morton Terrace

Gainsborough

Lincolnshire

DN21 2RF

United Kingdom

Phone Number: 0330 333 9090

e-Mail Address: Manager@theholidaysystem.biz

Back Proceed
You will then be taken to the SagePay secure payments system.
When payment has been completed you will be returned back to our website and receive a confirmation.

The Holiday System

Your order has been Successful.
The transaction has completed successfully.
The order number, for your reference is: **131030093723-95305**
You quote this in all correspondence with us.
In the company section you will be able to see the payment transaction you have made. You will also see any past transactions. If a topup event failed, this will show as an aborted transaction.

All credit card details are managed by SAGEPAY a PCI compliant system. We never see your card details, so you can be assured the system is safe and secure.
When a member of staff leaves the company you can retire them. This is a one way action and cannot be undone.

**Staff Leaving / Retiring**

- **Name**: Mr. Retired
- **eMail**: retired@theholidaysystem.biz
- **Country**: England
- **Manager**: James Brown
- **Attributes**: Manager, HR Supervisor
- **Annual Leave**: 25 days

**Leave for 2013**
- Available: 25 days
- Pending: 0
- Booked: 0

**Leave for 2014**
- Available: 25 days
- Pending: 0
- Booked: 0

**Reports**
- **Report Scope**: Company Default

**History**
- **Full History**: click

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**Edit Staff Member**

**General Info**
- **Name**: Mr. Retired
- **eMail**: retired@theholidaysystem.biz
- **Country**: England
- **Manager**: James Brown
- **Attributes**: Manager, HR Supervisor
- **Annual Leave**: 25 days

**Leave for 2013**
- Available: 25 days
- Pending: 0
- Booked: 0

**Leave for 2014**
- Available: 25 days
- Pending: 0
- Booked: 0

**Reports**
- **Report Scope**: Company Default

**History**
- **Full History**: click

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**http://www.theholidaysystem.biz**

Are you sure you want to remove this member of staff?

THIS IS PERMANENT!

**Cancel** | **OK**
Retired staff are greyed out in the list, you can still view their details, but not make any changes.

Retired staff are still counted in your user count. Once you are happy you can delete the Member of staff and recover their user license. This is a permanent none reversible function, all data relating to this member of staff will be removed. There is no backup of their data in any way. You are recommended to export the staff’s history before you delete them.
You will be asked 4 questions when you try and delete a member of staff, you must answer these correctly to proceed.

For instructions on how to approve and manage holiday requests, please see the Managers Guide or User Guide.