SO365 Time-off Manager

Admin User Guide

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SO365

Contents

Introduction 3
Understand Entitlements 4
Configuration 4
Administration of Time-off 4
Managing Time-off 5
Managing Absences 6
Managing Departments 7
Managing Non-working Days 7
Additional Help and Advice 8
End of year entitlement roll-over 9
Managing time-off for an employee 9
Who's out calendar 10

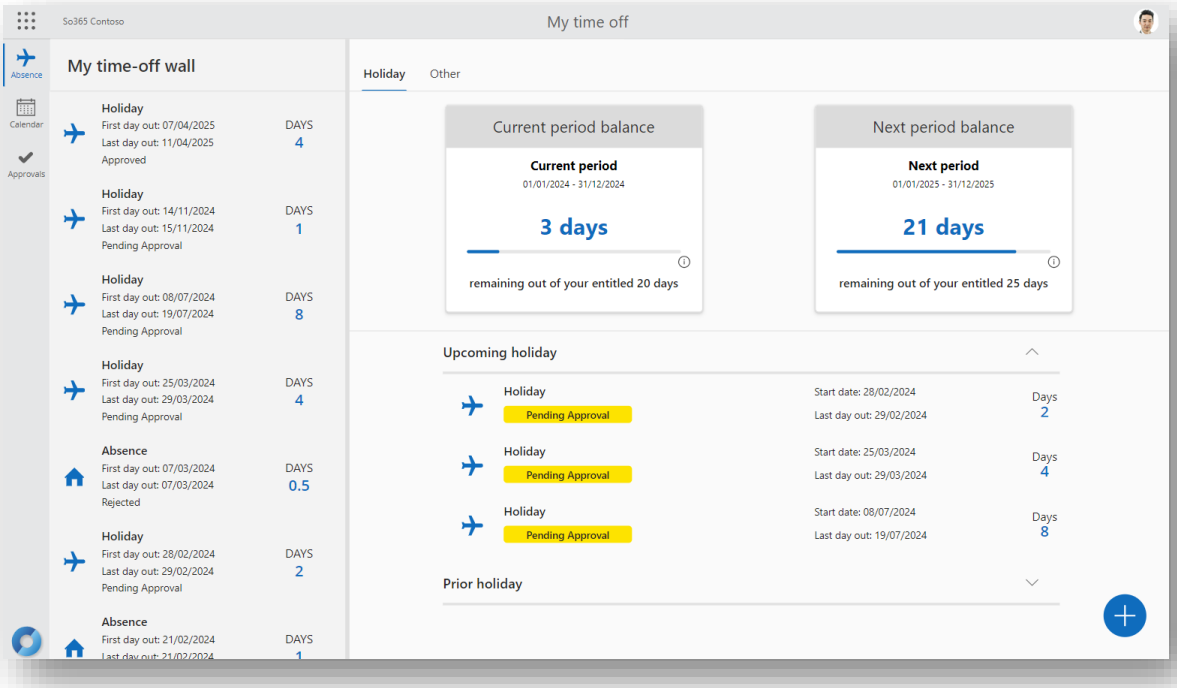
Introduction

This guide provides help for setting up and getting started with the So365 Time-off Manager app.

The **So365 Time-off Manager app** is a suite of integrated admin and employee mobile apps that allow for the effective central management of all time-off for your company.

It also provides your employees with the tools they need to access their time-off and to submit requests for approval from anywhere within their normal flow of work, be that on their mobile, within Microsoft Teams, or accessing it from your internal company communication hub in SharePoint.

Time-off Manager can handle the challenges of managing time off, such as complex calculations of holiday entitlement based on working patterns, calculating holiday in hours or days, applying the impact of public and bank holidays on time-off requests, and providing central visibility of who is in and who is out. Time-off manager can also track and report on any other form of absence that you want to track as a company, such as sickness, medical absence, jury service, maternity, or paternity leave, etc.



Understand Entitlements

A **holiday entitlement** is the amount of calculated holiday time an employee is entitled to in a holiday period and is also a record for that holiday period of their working hours, plus any admin applied holiday adjustments for that holiday period or any additional carry forward holiday from the prior holiday period.

Multiple entitlements can exist for a single holiday period to reflect changes to an individual's working hours where these exist. For example, if an employee worked an initial 35 hours a week and then this was reduced to 30 hours mid-year, two entitlement records would exist to reflect their working hours and to also record the entitlement they are due for each period based on those hours.

Overtime the entitlements provide a robust audit trail of each employee's annual holiday and the working pattern upon which this was based.

Where an employee joins the company mid-year then their entitlement for that holiday period would be based in their service start date, and where an employee leaves mid-year you are able to calculate the impact of their reduced holiday period.

Configuration

Administration of Time-off

The administration of time-off using the So365 Time-off Manager can be owned by a central HR team or by the management of your company or an admin team within the company.

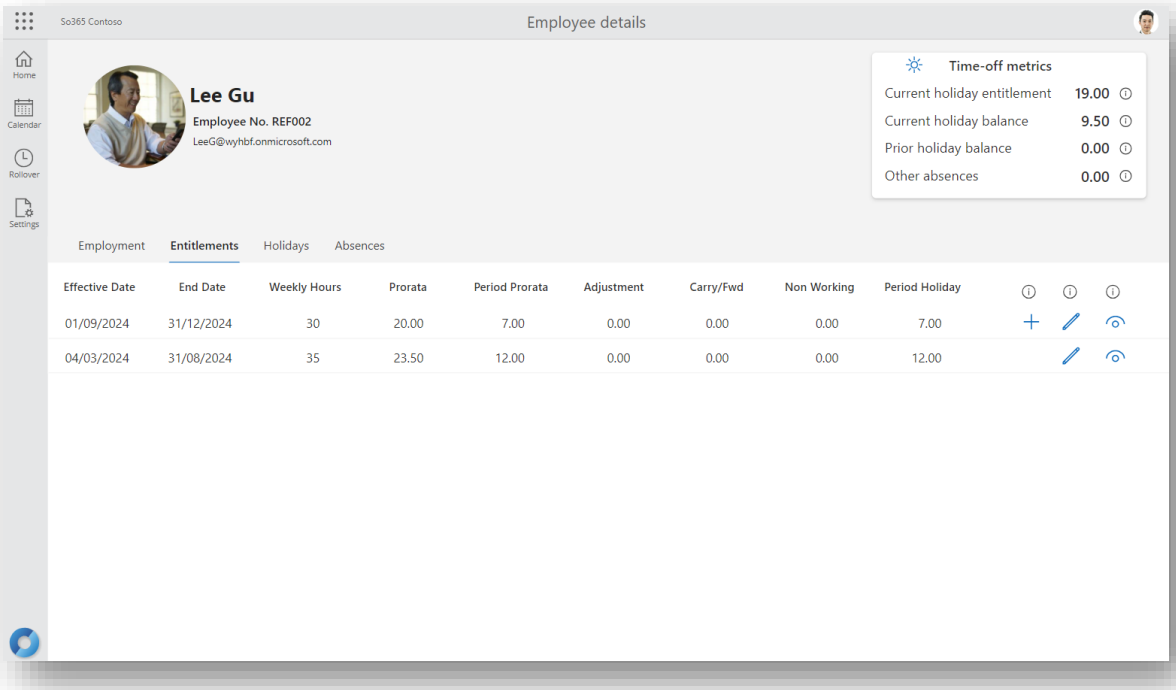
The solution is driven by a settings area in the admin app, and you can control and decide who has access to this area. With easy guidance, those individuals can manage the configurations and setup needed to drive the time-off process smoothly and effectively, such as defining non-working days.

Managing Time-off

Once configured, the first thing the central administration team needs to do is add all your people to the system. This is done by simply clicking the new employment button on the home screen and filling in a simple form.

When you add a new person, the system will create a holiday entitlement for them that runs for a whole holiday year or from their service start date to the end of the current holiday year if they start mid-year.

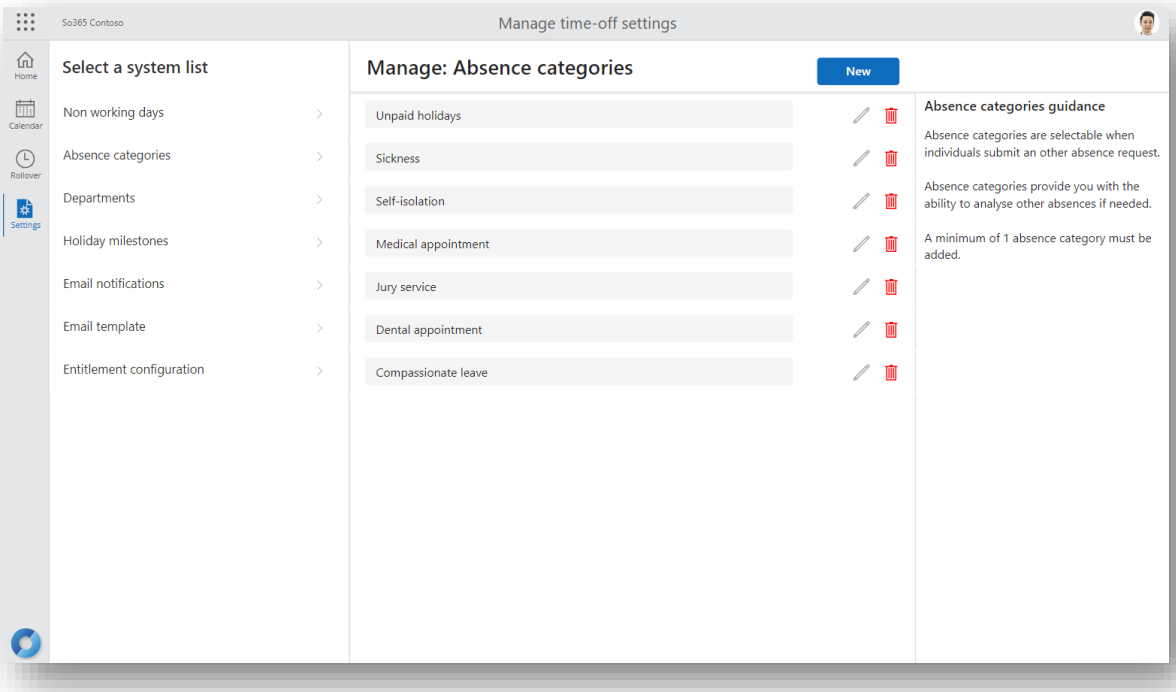
The system has an automated process that can be run at the end of the holiday year to create entitlements for the next year. You can adjust entitlements once they are created, such as giving an ad hoc holiday allowance or allowing individuals to carry forward holiday based on the rules you have configured.



Managing Absences

The Time-off Manager app also allows you to manage any other form of absence that you want to track as a company, such as sickness, medical reasons for being off, jury service, or maternity/paternity leave.

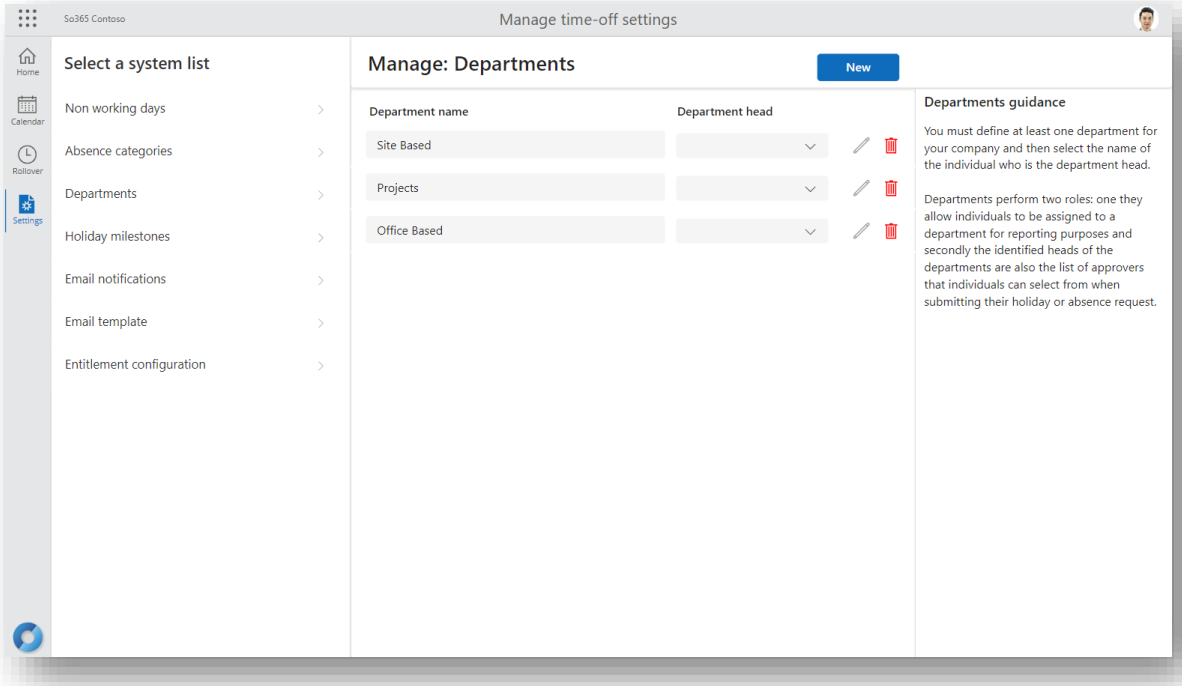
You can define absence categories and employees can select from those categories when requesting time off.



Managing Departments

The Time-off Manager app allows you to link employees to your company departments. You can define as many departments as you like, but there must always be at least one.

Each department has a department head assigned, who also becomes the approver of holiday. This is important because when individuals submit their time-off requests, they must select from a legitimate approver within your company.



Managing Non-working Days

One of the most sophisticated areas within the platform is how it handles non-working days.

Non-working days are not weekends but are typically the standard public holidays. However, the non-working days configuration could be used to reflect whole company shutdown periods such as over Christmas if employees are contractually forced to take this time off.

There are three calculation methods that you can select from to best meet your needs.

Method one

Method one enhances an individual's entitlement to compensate for missed non-working days.

For example, an employee works Tuesday to Friday and as result misses out on the public holidays that fall on a Monday. As full time employees effectively get enhanced holiday as public holidays are typically in addition to the company base offering, then the part-time individual is disadvantaged, and your policy is that they should receive additional holiday, prorated based on their working hours. So in this example they would receive 80% of one day additional holiday for each public holiday that falls on a Monday.

Method two

Method two takes the processing of method one even further by potentially reducing their holiday where they typically work on a day that would be a public holiday.

So, if the employee works Monday to Thursday, then they also get off any public holidays that fall on a Monday, but they should only be entitled to 80% of that day and so the calculation engine deducts 20% for each non-working Monday from their base entitlement.

Method three

Method three is the simplest. If you do not work a non-working day then you receive no enhanced holiday, but also if you do normally work a non-working day, you get the whole day off with no deduction from your standard holiday entitlements.

Additional Help and Advice

There is additional help and advice available in the application for setting up configurations.

Hovering over the information buttons and clicking on them will also give more detail in terms of what the configuration drives and what the effect is, as well as the options and values.

End of year entitlement roll-over

The **entitlement rollover process** is a feature of the SO365 Time-off Manager that allows the administrator to automatically create holiday entitlements for each employee for the next year based on the current year's balance and your carryover rules.

Entitlement rollover modes

The entitlement rollover process can be run in three modes: analyse, notify, and update. The analyse mode sends a spreadsheet analysis to the administrator, the notify mode informs the employees of their current and future entitlements, and the update mode creates the new entitlements for the next year.

Factors that affect entitlement rollover

The entitlement rollover process takes into account the settings and configurations of the Time-off Manager app, such as the non-working days, the absence categories, the departments, the holiday increment, and the calculation methods. The process also considers the individual employment records, such as the start date, the end date, the working hours, the adjustments, and the carry forward rules.

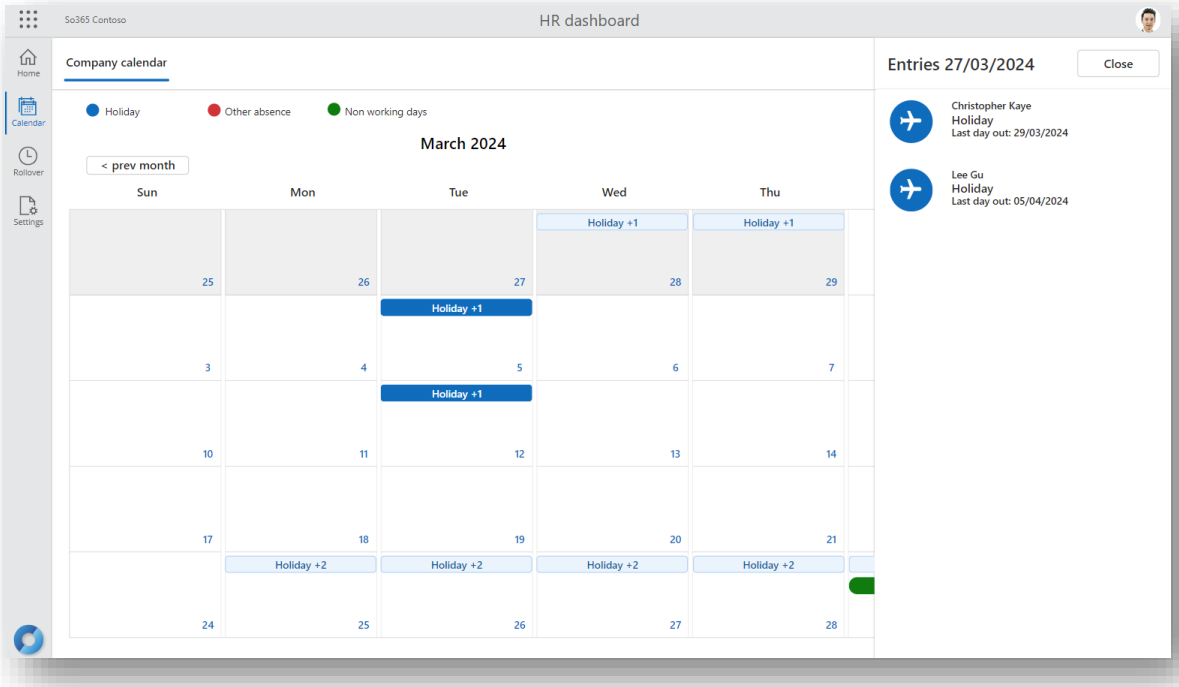
Managing time-off for an employee

The So365 Time-off Manager administrator can add or cancel future holiday and other absences for an individual from within the administration app. This is useful when initially setting up the system, as the administrator can replicate existing holiday requests for staff.

The administrator can also add new absences for an individual, for example, if an employee calls in sick.

Where time-off is added via the Administration App then the system does not require this to have secondary approval, however the system still prevents an individual administrator from managing their own time-off.

Who's out calendar

The calendar function in the SO365 Time Off Manager app provides an overview of all the current absence and time-off by month. It allows you to move forward through the months to get an overall company view of who is off and when.

If you click on any of the days where there is an entry, it will show you all the bookings for that day. This gives you central visibility as to who is out and when.