

Staff Leave Planner Instructions (Hours Version)

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1 Introduction

The staff leave planner is an Excel tool to allow you to track staff vacation, sickness, holiday and other types of leave on an annual basis. The planner also allows you to create reports based upon the data entered onto the planner.

This document demonstrates how to set up and use the tool with the hours version of the planner.

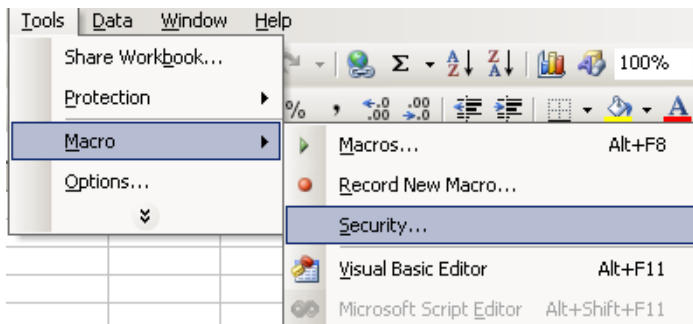
2 Requirements

You must have Office 2000, Office XP, Office 2003 or Office 2007 to run the planner. It **will not work** with Excel 97 or Excel 2004 on the Mac.

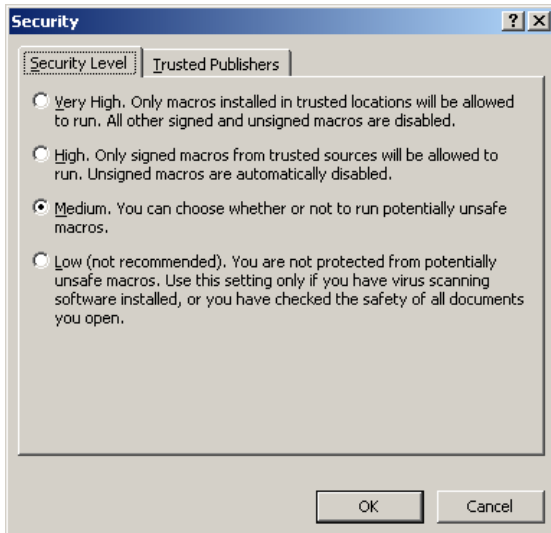
You must also have the macro security level set to Medium (recommended) or Low in order for the macros associated with the spreadsheet to work. If you do not know how to set the macro security level, follow the instructions below.

2.1 Setting the Macro Security Level

1. From the Excel menu, select **Tools > Macro > Security**



2. Set the security level to medium (see screen below). This means that when spreadsheets that contain macros are opened, you will have the choice of whether to enable or disable them



3. Close Excel to apply the changes.

4. Re-open the Staff Leave Planner

If this still has no effect, please contact your network administrator as you may need to enable macros on your network profile.

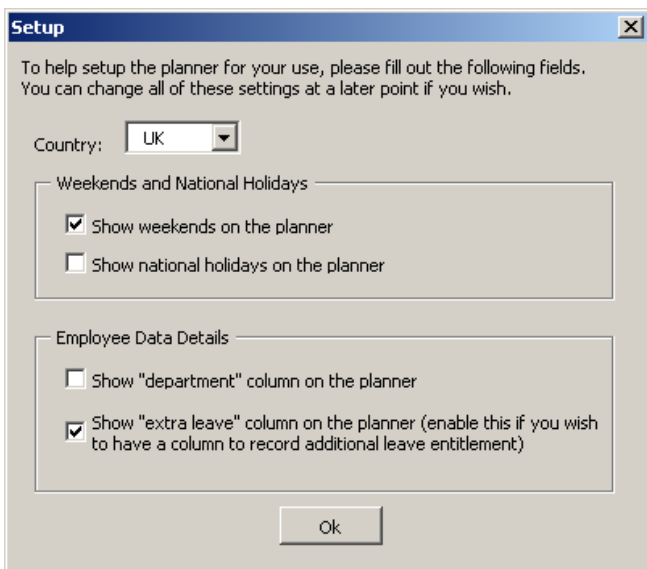
3 Getting Started

Open the staff leave planner and if prompted, enable macros.

In order to use the spreadsheet you will need to agree to the software terms and conditions. Ensure that you read and agree with them. Scroll down to the bottom of the page and click the button called 'I accept (Macros must be enabled)'.

3.1 The Setup Screen

Upon accepting the license, you will be prompted with the following setup screen:



You can configure the following (note that all of these settings can be “undone” at a later point in time):

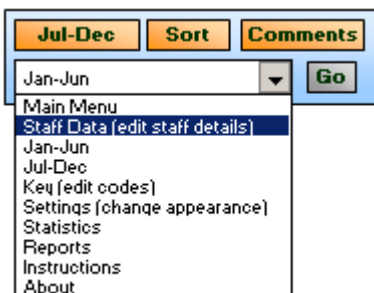
Option	Choices	Choice Description
Country	UK	Selecting UK will mean that the planner will have the UK National Holiday Dates loaded into it by default. The code for annual leave will be set to “H” which stands for holiday.
	USA	Selecting USA will mean that the planner will have the USA National Holiday Dates loaded into it by default. The code for annual leave will be set to “V” which stands for vacation.
	Other	Selecting other will mean that no national holiday dates are loaded into the planner (you can add your own at a later point). The code for annual leave will be set to the default, “H” which stands for holiday.

Option	Choices	Choice Description
Weekends and National Holiday Dates	Show weekends on the planner	Selecting this option will mean that weekends are shown on the planner.
	Show national holidays on the planner	Selecting this option will mean that national holiday dates are displayed on the planner.
Employee Data Details	Show "department" column on the planner	Checking this will mean that you can show the department column on the months view.
	Show "extra leave" column on the planner	Checking this option will mean that the "extra leave" column will be shown on the sheet where you enter staff data.

3.2 Navigating the Planner

The "menu" sheet contains a link to all of the different sheets on the planner. You can use the menu sheet to navigate to the different sheets.

In the top left hand side of the screen on the other sheets, there is also a smaller navigation form. This navigation form will have links to all of the other sheets. The orange buttons also enable features specific to the sheet you have open.



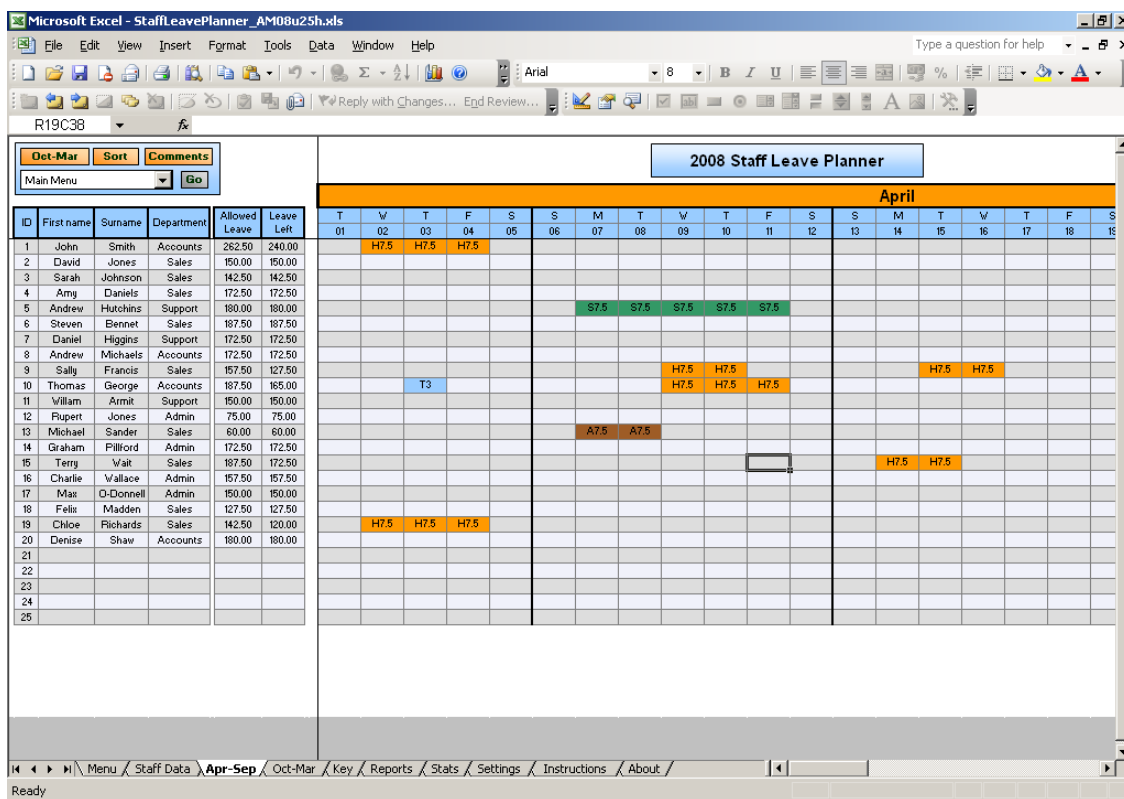
Above: An example of the navigation form.

4 The Different Sheets on the Planner

4.1 The Monthly View Sheets

The monthly view sheets are the two sheets where you record all of the different types of leave that you wish to record. Normally these sheets are named either Jan-Jun & Jul-Dec or Apr-Sep & Oct-Mar depending on the planner you purchased.

The screenshot below shows a monthly view with a typical amount of data recorded on it:



4.2 The Key Sheet

The key sheet is used to setup the codes and colours to use on the planner. On this sheet you can setup your own custom codes to use on the planner.

For further information refer to section 9.

4.3 The Statistics Sheet

The statistics sheet provides an overview of all of the leave taken on the planner.

For further information refer to section 10.

4.4 The Reports Sheet

The reports sheet allows you to create a leave report for a member of staff. This covers all types of leave and custom codes. For more information, please see section 12.

4.5 The Settings Sheet

The settings sheet allows you to change the following on the planner:

- Showing the “department” column on the “staff data” and monthly view sheets.
- Showing the “sick taken” column on the monthly view sheets.
- Showing the “extra leave entitlement” column on the “staff data” sheet.
- Showing weekends on the monthly view sheets.
- Showing national holiday dates on the planner, and customising the national holiday dates

For further information, refer to section 11.

5 Adding Staff to the Planner

Staff details can only be added to the “Staff Data” sheet. When staff data is added to this sheet, it is replicated across to the monthly view sheets. To add staff data, perform the following:

1. Click on the “Add Staff to Planner” button.



2. The planner will identify and select the next free row to enter the data onto.

3. Enter the information for your member of staff onto the row. The screenshot below shows an example of this.

Staff ID	First Name	Surname	Department	Annual Leave Entitlement	Extra Leave Entitlement	Total Leave Entitlement
1	John	Smith	Accounts	262.50		262.50
2	David	Jones	Sales	150.00		150.00
3	Sarah	Johnson	Sales	142.50		142.50
4	Amy	Daniels	Sales	172.50		172.50

Note: The “Extra Leave Entitlement” and “Department” columns will only be showing if you enabled them on the setup screen or from the settings sheet.

4. The planner will automatically calculate the “Total Leave Entitlement” and will also update the monthly view with the staff details.

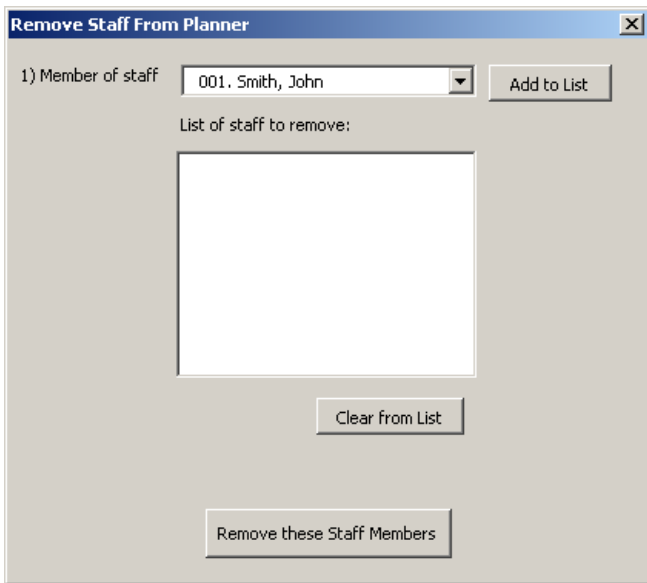
6 Removing Staff from the Planner

To remove staff from the planner, perform the following:

1. Navigate to the “Staff Data” sheet
2. Click on the “Remove Staff from Planner” button



3. The following form will load:



You must perform the following steps:

- i) From the drop down box select the member of staff you wish to remove
- ii) Click the “Add to List” button
- iii) Repeat steps i and ii for staff that you wish to remove.
- iv) Once you have added all the staff, click on the “Remove these Staff Members” button.

7 Recording Staff Holiday, Training and Sickness

Annual leave, Training and Sickness each contain their own codes:

Description	Code
Annual leave	H or V (depending on how the "key" sheet is set up)
Sickness	S
Training	T

To represent these on the spreadsheet you will need to enter a code in the relevant column and row for the member of staff you wish to record it against along with the number of hours for this type of leave.

Take a look at the following screen:

The screenshot shows a Microsoft Excel spreadsheet titled "StaffLeavePlanner_AM08u25h.xls". The spreadsheet contains a table with the following data:

ID	First name	Surname	Department	Allowed Leave	Leave Left	W 01	T 02	F 03	S 04	S 05	M 06	T 07	W 08
1	John	Smith	Accounts	262.50	240.00								
2	David	Jones	Sales	150.00	136.00		H7	H7					
3	Sarah	Johnson	Sales	142.50	142.50								
4	Amy	Daniels	Sales	172.50	172.50						T4		
5	Andrew	Hutchins	Support	180.00	180.00				C7.5				
6	Steven	Bennet	Sales	187.50	187.50		S4						
7	Daniel	Higgins	Support	172.50	172.50								

This represents:

- John Smith had 7 hours holiday on the 2nd and 3rd – The code for holiday is “H” and the total hours is shown by the 7.
- Amy Daniels had 4 hours training on the 6th – The code for training is “T” and the total hours is shown by the 4.
- Andrew Hutchins had 7 and a half hours of a custom code on the 4th – The custom code in this instance is shown by the “C” (this could be changed to whatever you want) and the total hours is shown by the 7.5.

When you add or remove annual leave, the “Leave Left” column will automatically be updated.

When you add or remove sick leave, the “Sickness Taken” column (if you have enabled it from the “settings” sheet) will automatically be updated.

8 Using Comments

8.1 Adding Comments onto the Monthly View

The planner allows you to add comments to cells so that you can annotate your entries. Due to the protection in place, you cannot add comments the conventional way. Instead, follow the steps below:

1. Click on the cell you wish to add a comment to – this has to be within the staff date area where you can enter leave entitlement.
2. Click on the “comments” button in the top left hand corner of the planner
3. A form will load up. For your information only it will show you the user and date that you have selected.
4. Enter into the comments field the comment you wish to add to the cell
5. Select make comment visible if you wish it to permanently show on the planner, otherwise comments will be visible when you move the mouse over the commented cell
6. Click “Update Comment”

8.2 Removing Comments from the Monthly View

You can remove entered comments in three ways: 1) Remove a particular comment. 2) Remove all comments for a member of staff. 3) Remove all comments from the planner

To view these options follow the steps below:

1. Click on the cell you wish to remove the comment from, or a cell in the row relating to the member of staff
2. Click on the “edit comments” button in the top left hand corner of the planner
3. On the form, click on the “Clear Comments” tab
7. **Note:** If you are removing a comment for a particular member of staff, you must first highlight a cell on the planner that is in the same row as a member of staff, before loading the edit comments form.

9 Configuring the Key Sheet

The key sheet allows you to change the colours and codes used on the planner. You are restricted from changing the codes for sickness and training. You must also not insert any rows or columns as this will cause the calculations on the planner to fail.

On the key sheet you can:

- Change the code for annual leave
- Create up to 10 custom keys
- Change the colour of the custom keys

9.1 Changing the code for annual leave

You can change the codes for annual leave from H (the “H” standing for holiday) to V (“V” standing for vacation). To change the code, simply type the new code onto the key sheet in the given cell.

9.2 Creating custom codes

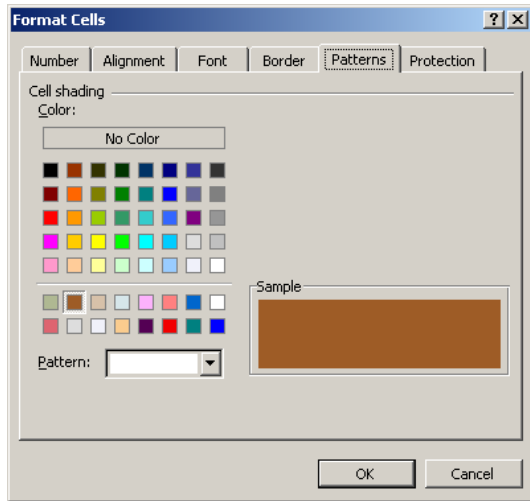
On the key sheet there is space for 10 custom codes. To create your own code, perform the following steps:

- 1) In the “code” column enter your new code (a code must be a letter and can only be one letter long).
- 2) In the description column, set the description for this code. It is important you set this as the stats and reports column will use it.

9.3 Changing the colour of codes

To change the colour of codes, perform the following:

- 1) Select the cell in the “colour” column
- 2) From the excel menu, select **Format > Cells**
- 3) Select the patterns tab
- 4) Select the colour you want to change it to and click Ok



- 5) On the “key” sheet click the “Apply Changes” button

10 Using the Statistics Sheet

The statistics sheet provides an overview of all of the leave taken on the planner. It has the following rules:

- The statistics will automatically hide any unused rows on the planner.
- The statistics will appear in the same order that the data is sorted on the monthly sheets

You can choose which columns are shown on the statistics sheet. To do this, perform the following:

- 1) Click on the “edit columns shown” button
- 2) On the form that loads, the list on the left hand side contains all of the columns that will be shown on the stats. Use the “add” or “remove” buttons to edit this list.
- 3) Click on the “apply” button.

11 Adjusting the Settings on the Planner

The settings sheet allows you to change the way the planner is displayed to you.

11.1 The Department Column

The “Department Column” is an optional column on the planner that you can use to record which staff members are in which departments. If you enable this column, you have the additional option to sort the monthly view by department.

By enabling this column, you will see it on the following sheets:

- The monthly view (e.g. Jan-Jun, Jul-Dec) sheets
- The “Staff Data” sheet.

To enable/disable the department column perform the following:

- i) Navigate to the “Settings” sheet
- ii) Check/Uncheck the “Show Department” checkbox
- iii) Click on the orange “Apply Changes” button

11.2 The Sick Taken Column

The “Sick Taken Column” is an optional column on the planner that you can use to quickly see the total sickness of each member of staff on the monthly view sheets. This information is also available on the stats sheet or through creating a report so by not enabling the sick taken column you will have more room available to see the months on the monthly view sheets.

To enable/disable the sickness taken column perform the following:

- i) Navigate to the “Settings” sheet
- ii) Check/Uncheck the “Show Sick Taken Column” checkbox
- iii) Click on the orange “Apply Changes” button

11.3 The Extra Leave Entitlement Column

The “Extra Leave Entitlement Column” is an optional column on the staff data sheet that you can use to record any additional leave that does not make up part of the employees basic entitlement (e.g any extras days they have carried over from the previous year)

To enable/disable the extra leave entitlement column perform the following:

- i) Navigate to the “Settings” sheet
- ii) Check/Uncheck the “Show Extra Leave Entitlement (Staff Data Sheet)” checkbox
- iii) Click on the orange “Apply Changes” button

11.4 Showing / Hiding Weekends

You can choose to show or hide weekends on the planner. Simply check/uncheck the “Show weekends on the planner” box accordingly and click on the orange “Apply Changes” button

11.5 National Holiday Dates

You can choose to show or hide national holiday dates on the planner. You can also create your own national holiday dates to fit accordingly with your country and your businesses rules regarding national holiday.

11.5.1 Editing National Holiday Dates

If you set up your planner to be USA or UK, then some default holiday dates will have been loaded. However, you are free to change these dates as you wish.

In any row within the white cells, add the name and date of the bank holiday.

The comment offset column is used to determine where you want the comment to appear: to the left or to the right of the cell.

The shade columns refers to whether or not you wish for the entire column to be shaded on the monthly view.

11.5.2 Showing National Holiday Dates

Once you have added your national holiday dates, ensure the “Show national holiday dates” box is checked and then click on the orange “Apply” button. After a few seconds the holiday dates will be showing on the monthly view.

11.5.3 Clearing National Holiday Dates

To remove all national holiday dates, simply uncheck the “Show national holiday dates” box and then click on the orange “Apply” button. After a few seconds the holiday dates will be removed from the monthly view.

12 Creating Reports

One of the new features of the staff leave planner is the ability to create reports. A report will give you more detail about staff leave than the statistics will.

12.1 Creating a New Report

To create a new report, follow the steps below.

1. Navigate to the “Reports” sheet.
2. Click on the “Create New Report” button in the top left corner.

Create New Report

The following form will load:

3. The first step is to select the member of staff from the drop down list. Note that dropdown box is ordered by staff id, so ensure you know the id set on the planner for the member of staff.
4. Set the start date of the report. If you have created a previous report, the start date will be the same as the start date entered on the last report.
5. Set the end date of the report. If you have created a previous report, the end date will be the same as the end date entered on the last report.

6. Customise which columns you want showing on the report. All entries in the left hand list are what will be shown in the report. To remove an entry from the list, click it then click on the remove button. Similarly to add an entry to the list, select the item in the right hand list and click on "Add".

7. Once you are happy with the settings, click on the "Create Report" button.

The report will be generated.

12.2 Notes About Reports

Whenever you create a report, it will retain the settings you entered for the previous report.

The report will count all of the consecutive days a person has had the same type of leave which includes weekends. If your working week is from Monday to Friday, please ensure you have hidden the weekends from the settings sheet. That way, the planner will know not to count Saturdays and Sundays as working days.