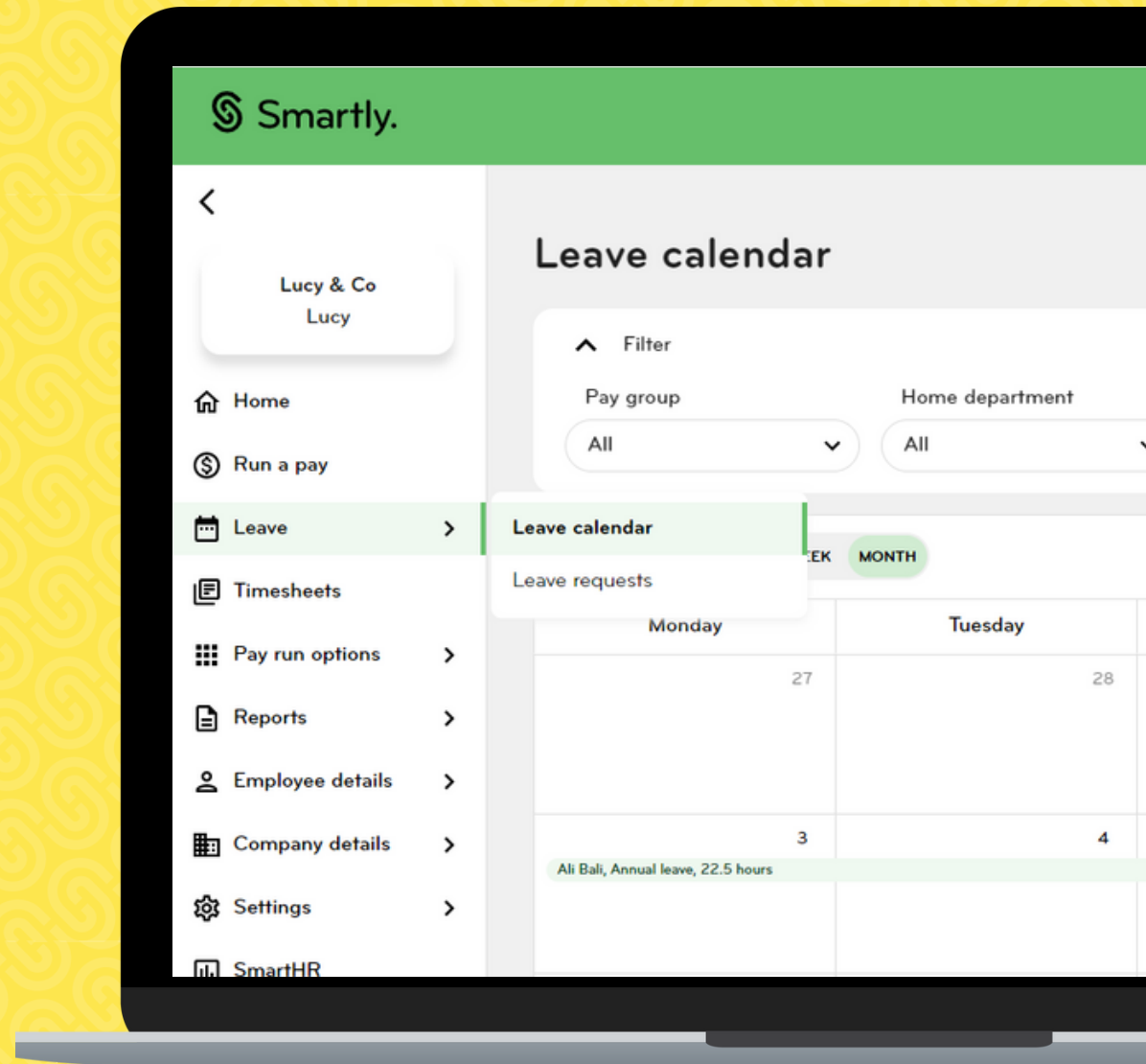
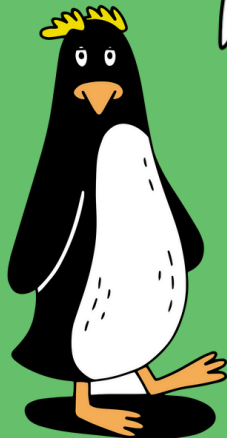




# Manage leave, Smartly.

A complete guide to using your leave calendar.

WHY AM I THE ONLY ONE NOT PLANNING A HOLIDAY...



# Contents

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- 3. Viewing your leave calendar
- 3. Using your calendar filters
- 4. Managing your calendar view
- 5. Adding leave requests
- 6. Managing leave requests

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- 7. Using your calendar filters
- 8. Managing your calendar view
- 9. Adding leave requests
- 10. Managing leave requests

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- 11. How to check user roles



# Viewing your leave calendar

You can find your leave calendar by heading to the 'Leave' section in the left-hand navigation of your Smartly site, scroll down and click on 'Leave calendar'.

## Filters

It's easy to filter your calendar view, to find the information you need. You can filter by:

- pay group
- home department
- status
- leave type
- employee

Click the arrow to select from the drop down menu, or start typing to search what you're looking for.

## Leave statuses

### Pending

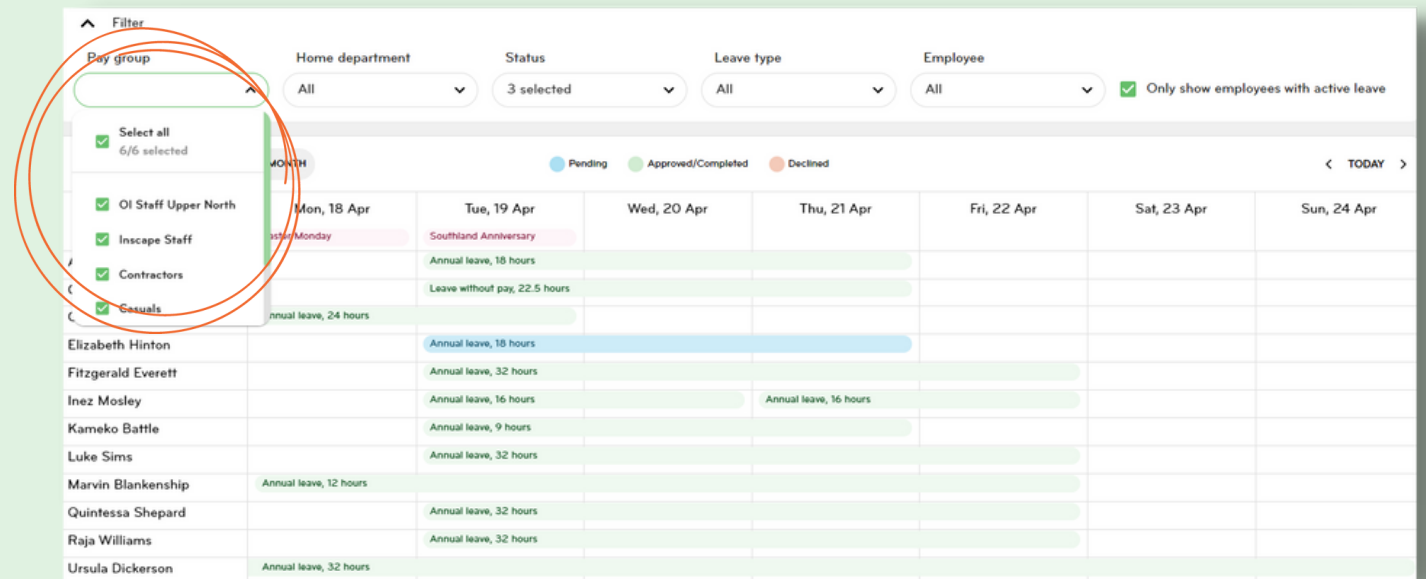
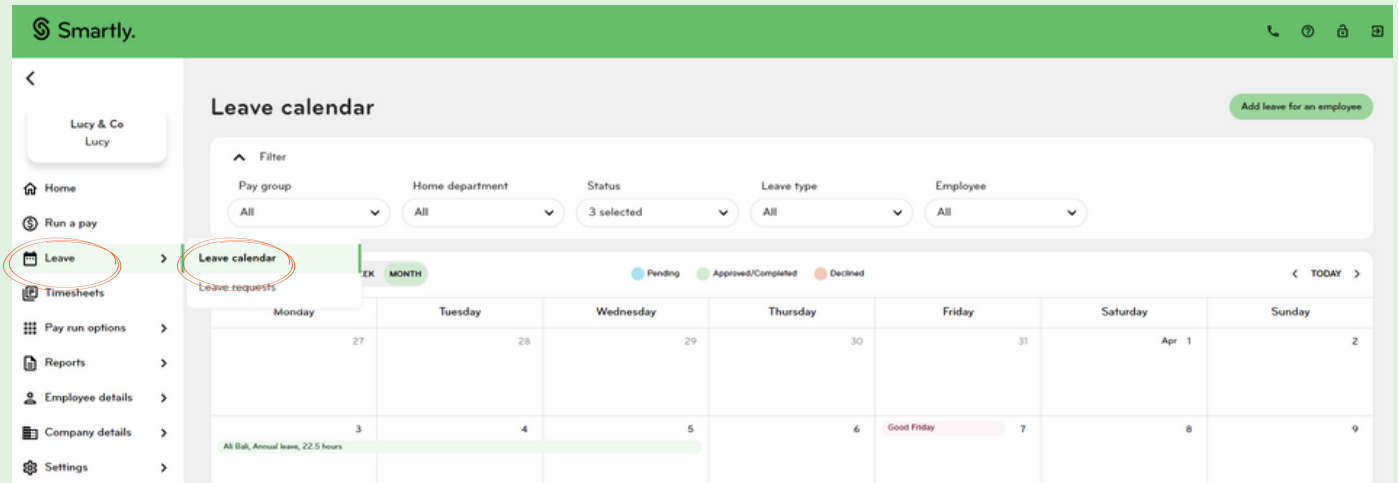
Leave requests that haven't been approved or declined.

### Approved/Completed

Leave requests that have been approved, or completed.

### Declined

Leave requests that have been declined. By default, you aren't shown this leave in your calendar, but can use the 'Status' filter to show declined leave.



# Calendar view

You can easily change your calendar view by selecting 'WEEK' or 'MONTH'.

Click on the month at the top left hand side of the calendar at anytime to select a date using the date picker.

## Month view

This view only shows you employees with leave requests.

## Week view

By default, this view will only show employees with leave. Untick the box below to show all employees.

Only show employees with active leave

Click 'TODAY' to be taken back to the current date. Or use the arrows to move forward or backwards between the weeks/months.

# Statutory holidays

Statutory holidays are always shown in your calendar in pink. You'll also be shown all regional anniversaries.

# Payroll admins

## Month view

The screenshot displays a monthly calendar view for June 2022. At the top left, the current month 'April 2022' is shown with 'WEEK' and 'MONTH' view toggles. A date picker is open, showing the year 2022 selected. The calendar grid shows days from Monday to Sunday. Leave requests are represented by horizontal bars, with some in pink (statutory holidays) and others in green (annual leave). A 'TODAY' button is circled in red in the top right corner. The 'WEEK' and 'MONTH' view toggles are also circled in red.

## Week view

The screenshot displays a weekly view of the calendar for April 2022. At the top, there are filter options for 'Pay group', 'Home department', 'Status', 'Leave type', and 'Employee'. A checkbox labeled 'Only show employees with active leave' is checked and circled in red. The calendar grid shows days from Monday to Sunday. Leave requests are shown as horizontal bars for each employee, with some in pink (statutory holidays) and others in green (annual leave). A 'TODAY' button is circled in red in the top right corner.

# Adding a leave request

As a payroll admin, you can add a leave request on behalf of any employee that belongs to a pay group that you have access to. To do this, start by clicking 'Add leave for an employee'. Enter all the leave information in the pop-up. Once completed, click Save.

**Note:** You'll only be able to apply for leave types that the employee is enabled for.

Enter the leave request into the current pay packet by ticking 'Pay now'.

**Pay now**

Tick to add this leave request into the current pay packet. Otherwise it will be added in the pay period(s) it relates to.

Click 'Cancel' to delete the request. You'll then be shown the message below, and a draft won't be created.

**Discard this leave request?**

A draft won't be created.

The screenshot shows the 'Leave calendar' interface. At the top right, there is a button 'Add leave for an employee' circled in red. Below it are filter options for Pay group, Home department, Status (3 selected), Leave type, and Employee. A checkbox 'Only show employees with active leave' is checked. The main area is a calendar grid for April 2022, showing leave requests for various employees like Alfreda Hubbard, Carl Oneill, etc. A 'Add new leave request' pop-up is open, showing fields for Employee (Alfreda Hubbard), Leave Type (Annual Leave), Date range (14/06/2022 - 17/06/2022), and Duration (18 Hours). A 'CHOOSE DATE(S)' calendar is also visible, showing the dates 19, 20, and 21 of April 2022 selected. At the bottom of the pop-up, there is a 'Pay now' checkbox and 'Cancel'/'Save' buttons.

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## Costing leave requests

You can cost leave to departments or jobs for all employees that are set up for this functionality.

# Managing leave requests

- 1 Pending leave requests**  
You can make changes to a pending leave request, and either approve or decline.
- 2 Approved leave requests**  
You can make changes to an approved leave request, and either save or decline.
- 3 Partially processed leave requests**  
You can only make changes to the days, hours and weeks of the pay period, as well as the leave end date of a partially processed leave request.

## View only

- 4 Declined leave requests**  
Declined leave requests are view only, and unable to be edited.
- 5 Completed leave requests**  
Completed leave requests are view only, and unable to be edited.

**Leave items**  
Leave items are created in the 'Run a pay' section of your Smartly site, and will be shown in your Leave Calendar. However, they are 'read only', and only shown when 'approved' or 'completed'. If you want to edit an approved leave item, you can do this by double clicking into the employee from the Run a pay screen.

## Payroll admins

**Tip**  
When you're editing an approved or partially processed leave request that is included in an open pay packet, you'll be prompted to clear the pay packet when you click Save.

# Leave calendar for line managers



The screenshot shows the Smartly leave calendar interface. At the top, there is a green header with the Smartly logo and a menu icon. Below the header, the company name "Turner Drainage Limited" and the manager's name "Malcolm Fuentes" are displayed. A sidebar on the left contains navigation options: "Team leave", "Leave calendar" (selected), and "Leave approvals". The main content area is titled "Leave calendar" and includes a filter section with "Status" (3 selected), "Leave type" (All), and "Employee" (All). The calendar view is for "December 2021" and is set to "WEEK" view. The calendar shows days from Monday, 27 Dec to Wednesday, 29 Dec. Key events include Christmas Day on Monday and Boxing Day on Tuesday. The calendar lists leave requests for several employees: Berk Tyson (Annual leave, 24 hours), Chantale Myers (Annual leave, 32 hours), Charles Shepard (Statutory holiday), Hector Yates (Statutory holiday), Ifeoma Stephens (Statutory holiday), and Kim Summers (Statutory holiday). The calendar also shows pending and approved leave requests.

	Mon, 27 Dec	Tue, 28 Dec	Wed, 29 Dec
	Christmas Day	Boxing Day	
Berk Tyson	Annual leave, 24 hours Statutory holid...	Statutory holid...	
Chantale Myers	Annual leave, 32 hours Statutory holid...	Statutory holid...	
Charles Shepard	Statutory holid...	Statutory holid...	Annual leave, 22.5 h... Lieu taken, 1.5 h...
Hector Yates	Statutory holid...	Statutory holid...	Annual leave, 1... Lieu taken, 6.83...
Ifeoma Stephens	Statutory holid...		
Kim Summers	Statutory holid...	Statutory holid...	Annual leave, 24 ho...

# Viewing your leave calendar

You can find your leave calendar by logging into your [Manager's Portal browser](#). Click on 'Team leave' and then 'Leave calendar'. If you're not currently using your Manager's Portal, read our [handy guide](#), or [watch our demo video](#) to get started.

## Filters

You can filter your calendar view by:

- status
- leave type
- employee

Click the arrow to select from the drop down menu, or start typing to search what you're looking for.

## Leave statuses

### ● Pending

Leave requests that haven't been approved or declined.

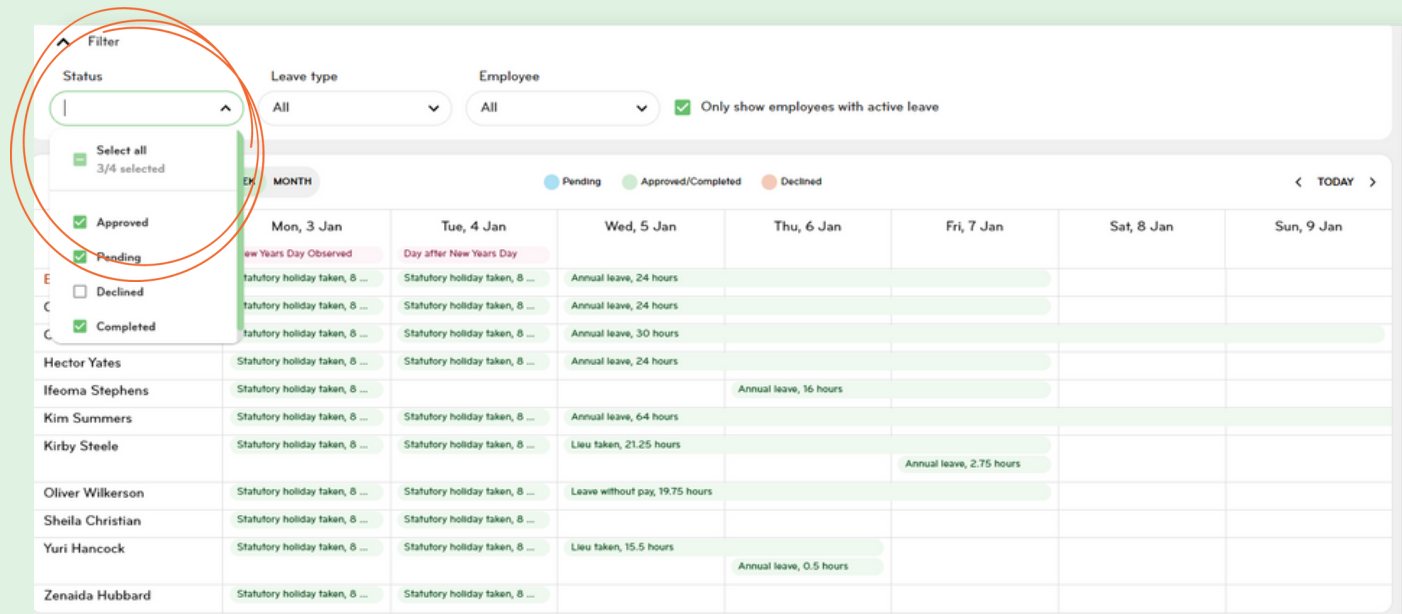
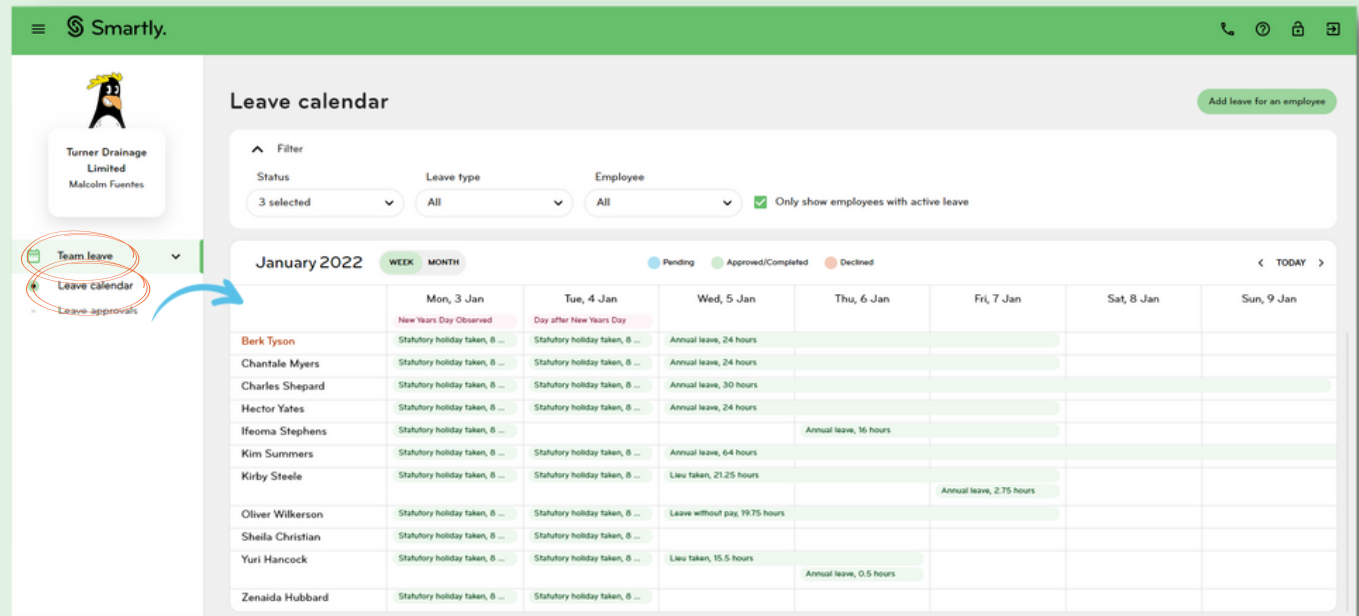
### ● Approved/Completed

Leave requests that have been approved, or completed.

### ● Declined

Leave requests that have been declined. By default, you aren't shown this leave in your calendar, but can use the 'Status' filter to show declined leave.

## Line managers





# Calendar view

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Click on the month at the top left hand side of the calendar at anytime to select a date using the date picker.

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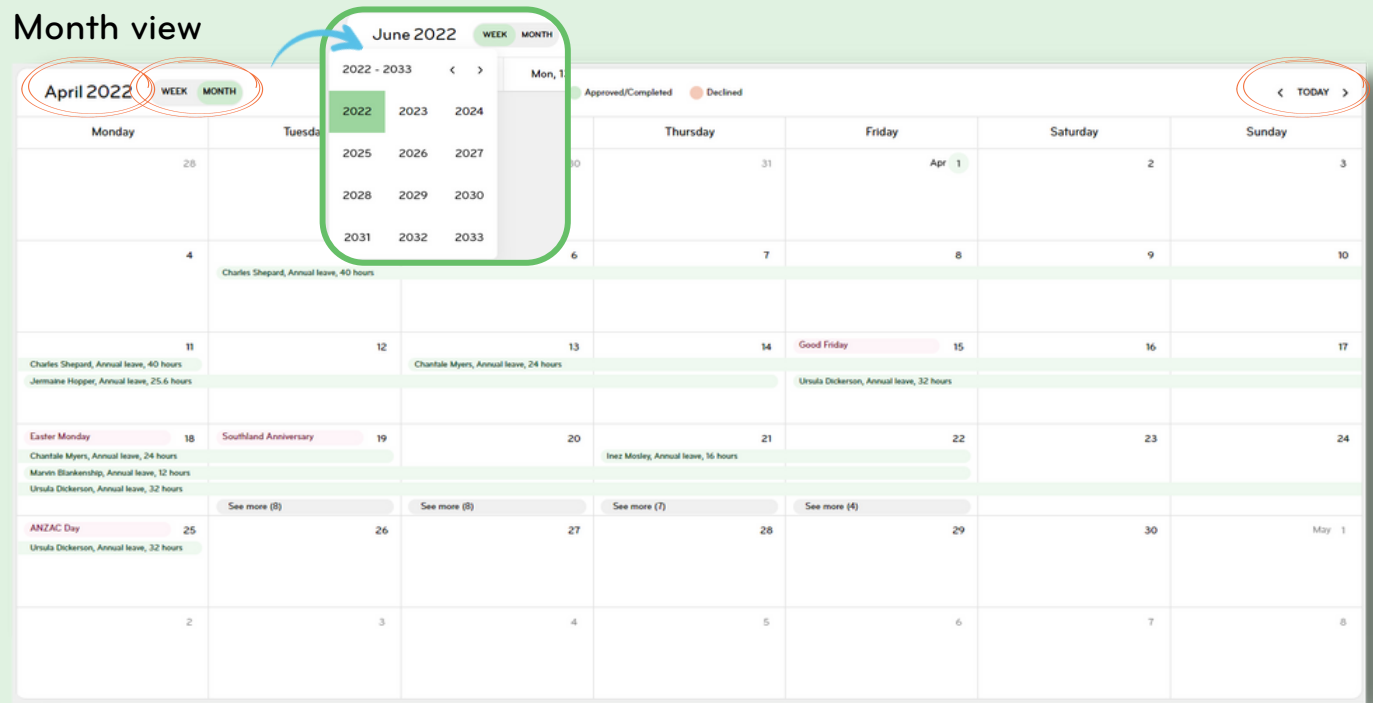
Click 'TODAY' to be taken back to the current date. Or use the arrows to move forward or backwards between the weeks/months.

# Public holidays

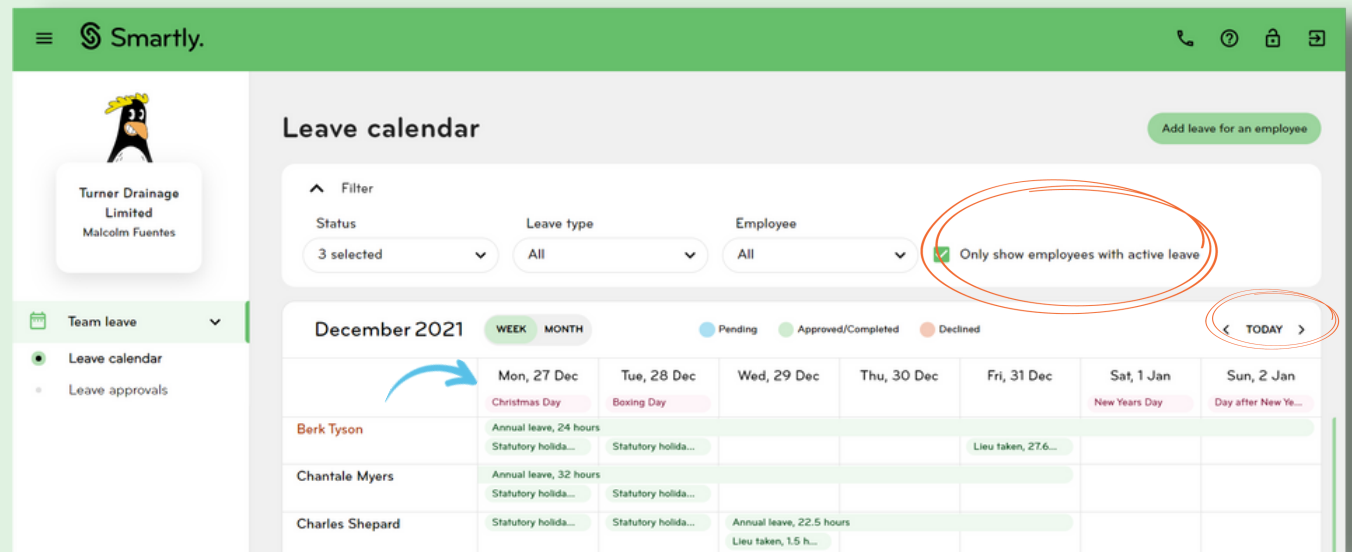
Statutory holidays are always shown in your calendar in pink. You'll also be shown all regional anniversaries.

# Line managers

## Month view



## Week view



# Adding a leave request

As a line manager, you can add a leave request on behalf of any employees that you are the leave approver for on the Manager's Portal. You'll only be able to apply for leave types that the employee is enabled for. If you don't have access to an employee you manage, chat to your payroll admin. Enter all the leave information in the pop-up. Once completed, click Save.

**Note:** You'll only be able to apply for leave types that the employee is enabled for.

Enter the leave request into the current pay packet by ticking 'Pay now'.

Pay now
 

Tick to add this leave request into the current pay packet. Otherwise it will be added in the pay period(s) it relates to.

Click 'Cancel' to delete the request. A draft won't be created.

**Discard this leave request?**

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### Leave items

Leave items that are created in the 'Run a pay' section of your Smartly site will be shown in your Leave Calendar. However, they are 'read only', and only shown when 'approved' or 'completed'.

## Managing leave - For line managers



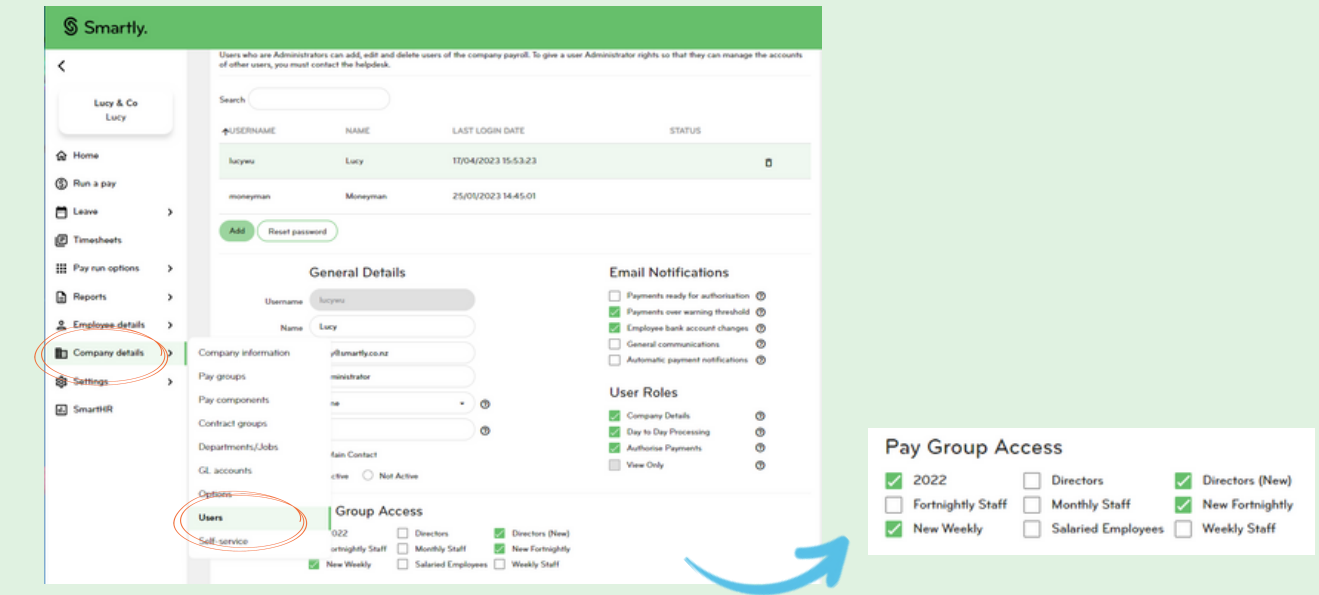
### Tip

You won't be able to edit an approved or partially processed leave request that is included in an open pay packet. If you need to make a change to a leave request that's included in an open pay packet, chat to your payroll admin.

# User permissions

## For payroll admins

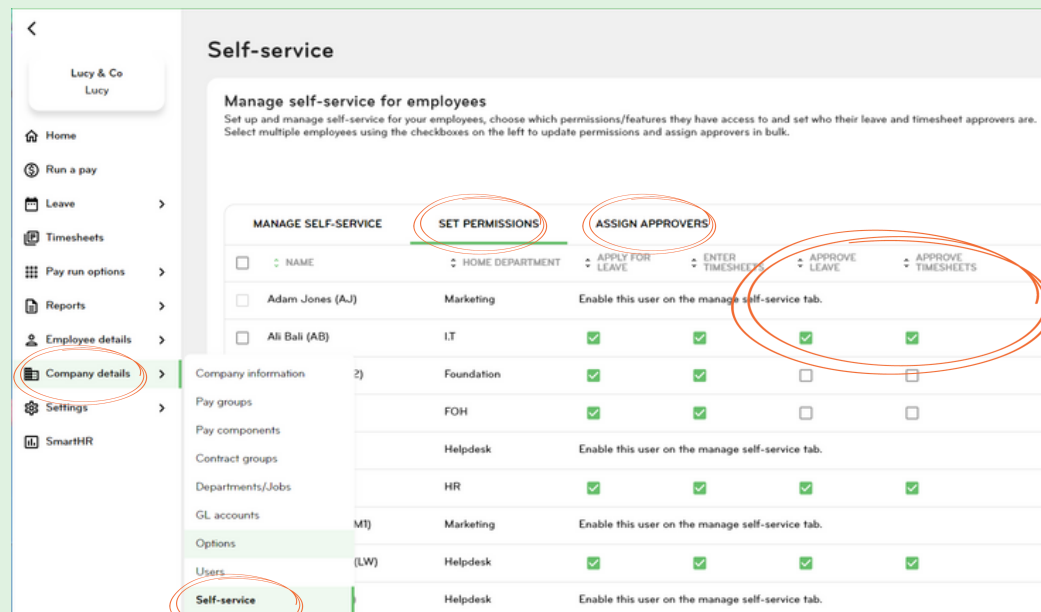
Payroll admins will only be able to manage leave in their Leave Calendar for employees who belong to pay groups they have access to. You can check this under 'Company details' > 'Users'.



## For line managers

Enabling line managers to approve leave can be managed under 'Company details' > 'Self-service' > 'Set permissions'.

You can also assign leave approvers for employees by going into 'Company details' > 'Self-service' > 'Assign approvers'. This will give their line manager access to manage their leave from the leave calendar.



# We're here to help

For information or answers to simpler questions head to our online help centre. Otherwise, if you've got something niggly or urgent that you want to chat through with an expert – we've got you!

You can reach our customer support team on 0800 10 10 38, Monday to Friday, excluding public holidays.

