

These instructions take you through the process of using the built in leave function.

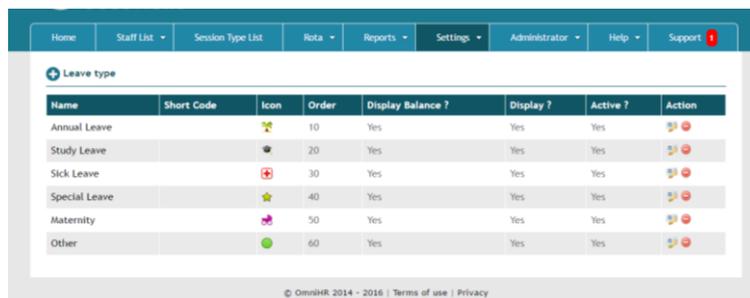
OmniRota includes a very useful leave function which includes the option to track sessions taken against an annual entitlement. Leave can be added:

- Manually by the rota administrator
- By individual staff members, who can apply for leave when logged in with their login ID, which must then be authorised by the rota administrator

Once leave has been added to the rota, staff who are on leave will not be selected to work.

Types of Leave

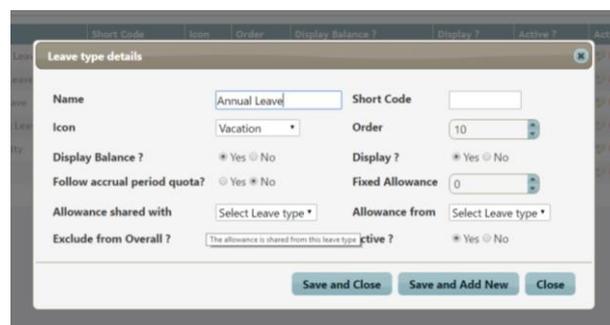
You can set the different types of leave that you wish to use on your rota. From the 'Settings' tab select 'Leave Type' to access the page below:



| Name | Short Code | Icon | Order | Display Balance ? | Display ? | Active ? | Action |
|---------------|------------|------|-------|-------------------|-----------|----------|--------|
| Annual Leave | | | 10 | Yes | Yes | Yes | |
| Study Leave | | | 20 | Yes | Yes | Yes | |
| Sick Leave | | | 30 | Yes | Yes | Yes | |
| Special Leave | | | 40 | Yes | Yes | Yes | |
| Maternity | | | 50 | Yes | Yes | Yes | |
| Other | | | 60 | Yes | Yes | Yes | |

There are a number of leave types included as standard but should you wish to add further leave types then click on the '+' icon to do so.

Clicking on any of the types of leave opens the dialogue box below from which you can change many settings relating to how that leave type is managed and how it is displayed in the staff file.



The features available within this dialogue box are:

Name: Name of leave type

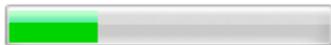
Short Code: not currently in use but will be used in future release

Icon: Allows you to select an icon (palm tree, red cross etc.) to represent that leave type within the iPhone app.

Order: Selects the order in which leave types will be displayed. Note that is usual to number in tens (10, 20, 30...) in order to allow later entries to be inserted at any location within the list.

Display Balance: This determines whether the balance of this leave type will be displayed in the staff file. If set to 'Yes', and the leave allowance is greater than 0 then it will be displayed with a progress bar as below:

Annual Leave



4 sessions booked out of 14, Remaining : 10

If set to No, then it will be displayed without the progress bar

Display: Determines whether this leave type will be displayed at all.

Follow Accrual Period Quota: If set to 'Yes', the leave quota for each staff member will be taken from that set via the 'Accrual Period and Quota' option accessed via the 'Settings' tab. The total leave quota will be the sum of this year's leave quota plus any leave carried over. If not it will be derived from the Fixed Allowance set below.

Fixed Allowance: The allowance for any leave type which has a consistent allowance for all staff can set the number here. Please note that this field will be in use only if the 'Follow Accrual Period Quota' (above) is set to 'No'.

Allowance Shared with and Allowance From: It is possible to link two leave types such that sessions taken from one leave type count against another type of leave also.

Exclude from Overall: Allows you to exclude this leave type from the overall leave total.

Active: Currently in use.

Annual Entitlement

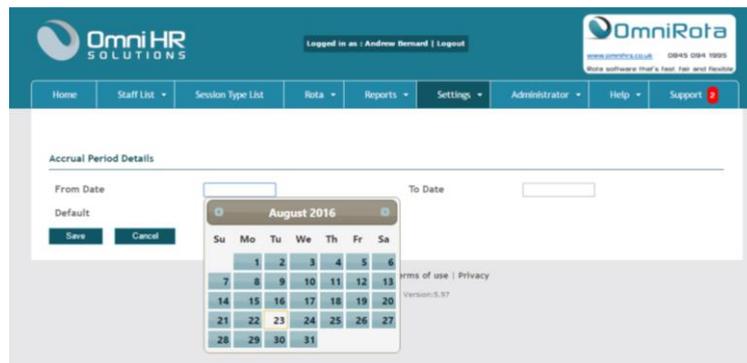
The rota administrator can allocate all staff an annual leave entitlement including sessions carried over from previous years or TOIL. Entitlement is entered as a whole number of sessions where typically 1 session = half a day. As leave is authorised, the remaining entitlement is reduced.

Begin by setting details of your accrual period or holiday year.

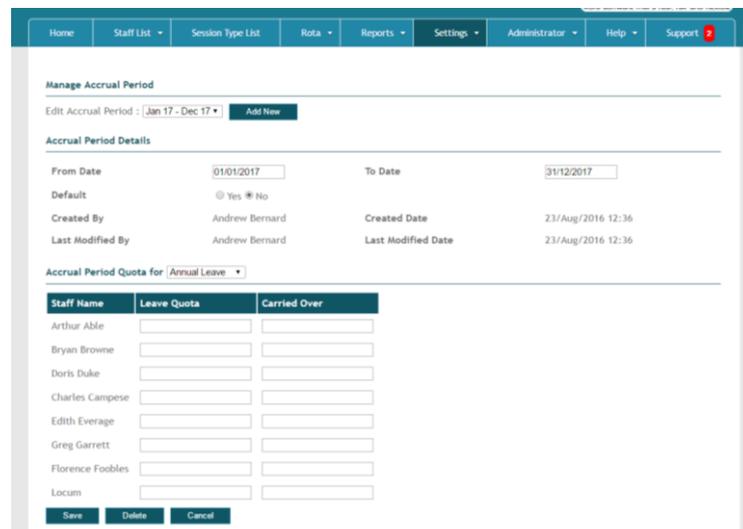
From the 'Settings' tab select 'Accrual Period and Quota' to access the page below:



Click 'Add New' to enter the details of the holiday year on the screen below:



Click 'Save' once complete to open the screen below:



This screen allows you to set the annual leave quota for each staff member and also add any leave carried over from a previous year.

Note that it is possible to create different holiday years for each staff member. We won't include a guide to that feature here as it is not likely to be used by the majority of clients. However, should you wish to access that feature then please contact us directly using the support system and we will explain how it works.

Once you have entered details of leave quotas and sessions carried over entitlements for each staff member, click 'Save'. Note that different entitlements can be set for each category of leave using the drop down menu. This feature is useful if staff have separate entitlements to study leave and annual leave. This can then be added and tracked separately.

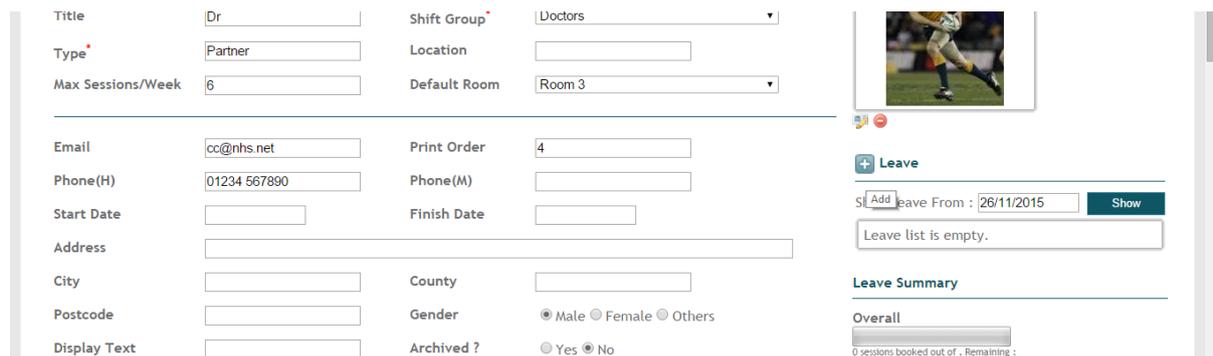
Note that although you can use the rota without using the leave tracker, leave must still be entered so that the system knows which staff are available to work.

Leave added manually by the rota administrator

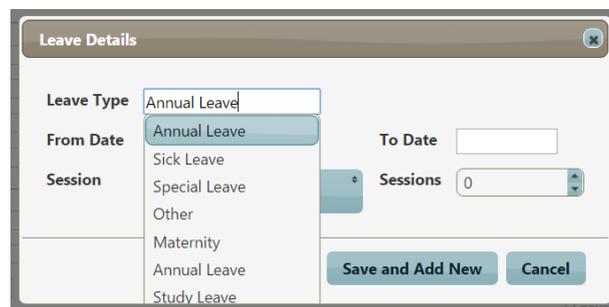
If you have already authorised staff leave then this can be added manually to the rota.

From the 'Staff List', select the staff member for whom you wish to allocate leave.

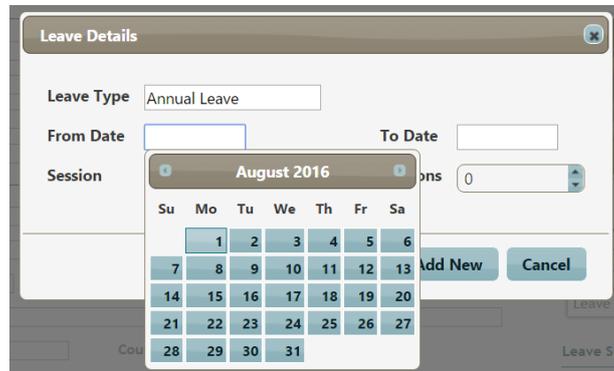
From the screen that opens, click on the '+' icon:



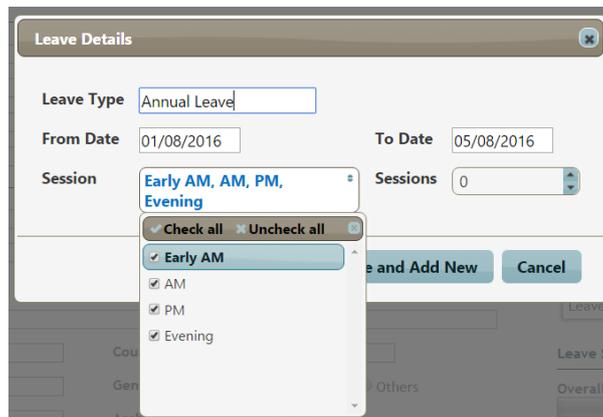
From the dialogue box that opens, select the appropriate type of leave from the drop down menu:



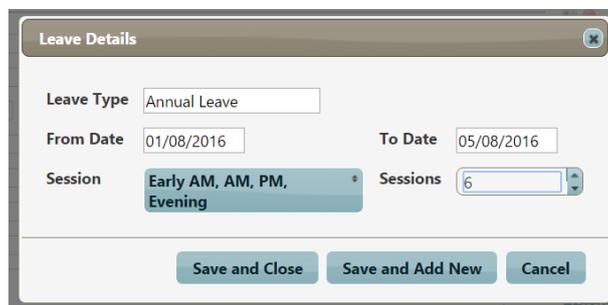
Now select the start date and then the end date of the leave period:



If the leave period is only a part of a day then select the appropriate sessions only. By default, all are selected:



If you are using the leave tracker then you must enter the number of sessions taken in the 'Sessions' box. A full week of leave equates to the total number of weekly sessions worked. In this case Dr. Campese usually works 6 sessions in a week so we enter '6' in the box:



Now save and close.

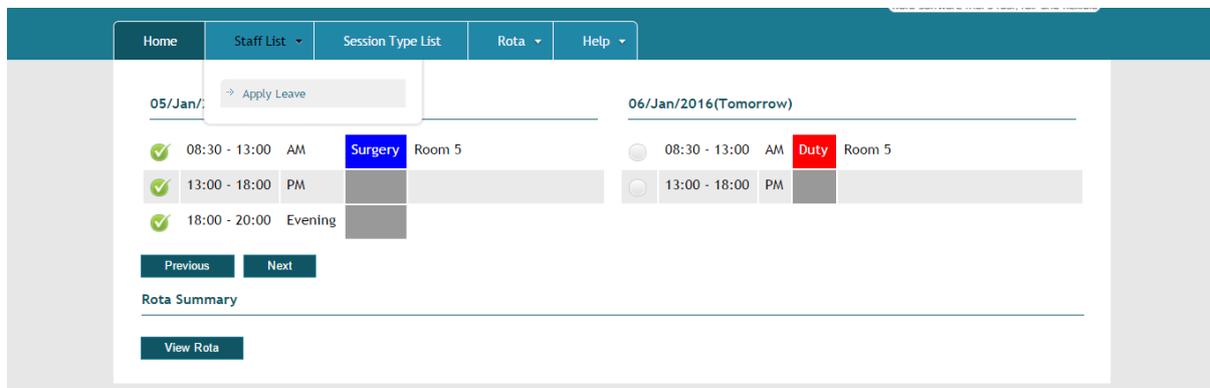
Note that his remaining entitlement has been reduced to 33 sessions and his leave is now shown as approved.

| | | | | | | |
|---|---|------------------|---|--|---|-------------------------------------|
| Phone(H) | <input type="text" value="01234 567890"/> | Phone(M) | <input type="text"/> | Show leave From : | <input type="text" value="26/11/2015"/> | <input type="button" value="Show"/> |
| Start Date | <input type="text"/> | Finish Date | <input type="text"/> | 01/Aug/2016- 05/Aug/2016 Annual Leave, 6 session(s) Approved | | |
| Address | <input type="text"/> | | | | | |
| City | <input type="text"/> | County | <input type="text"/> | Leave Summary | | |
| Postcode | <input type="text"/> | Gender | <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Others | Overall | | |
| Display Text | <input type="text"/> | Archived ? | <input type="radio"/> Yes <input checked="" type="radio"/> No | 0 sessions booked out of 36, Remaining : 39 | | |
| Notes | <input type="text"/> | | | | | |
| Login Details | | | | | | |
| <input type="button" value="Create Login"/> <small>Not created yet.</small> | | | | | | |
| Max Session | | | | | | |
| Max Session list is empty. | | | | | | |
| Leave Details | | | | | | |
| Accrual Date | <input type="text" value="01/01/2016"/> | Annual Allowance | <input type="text" value="36.00"/> | | | |
| Rolled Over / Lieu Accrued | <input type="text" value="3.00"/> | Remaining | <input type="text" value="33"/> | | | |

Staff Members Applying for Leave

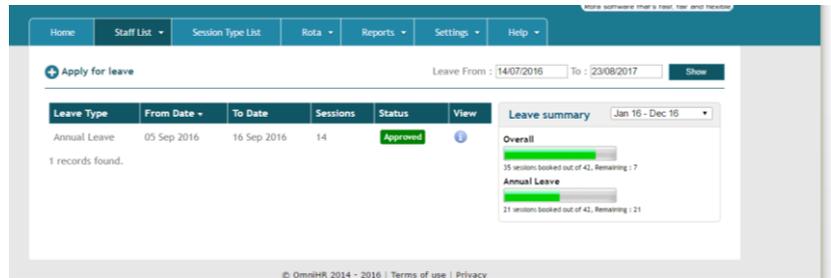
All staff members can apply for leave using their login ID. Note that if you are trying this as an administrator as part of a demo, you will need to logout and log back in again as one of the staff members as only rotaed staff members can apply for leave.

From the staff member home screen click on 'Staff List' and select 'Apply Leave':

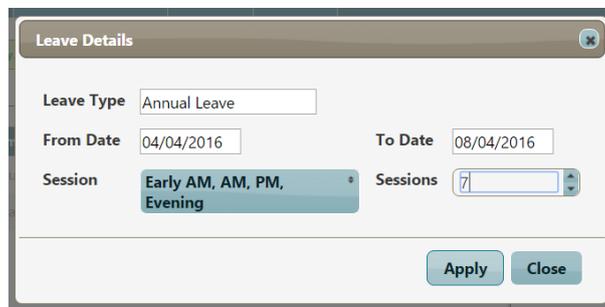


The screenshot shows the 'Apply Leave' interface. At the top, there is a navigation bar with 'Home', 'Staff List', 'Session Type List', 'Rota', and 'Help'. Below this, a date range is set from '05/Jan/' to '06/Jan/2016(Tomorrow)'. A dropdown menu is open over the '05/Jan/' date, showing an 'Apply Leave' option. The main area displays a grid of sessions for two days. On 05/Jan, there are three sessions: 08:30 - 13:00 AM (Surgery, Room 5), 13:00 - 18:00 PM, and 18:00 - 20:00 Evening. On 06/Jan, there is one session: 08:30 - 13:00 AM (Duty, Room 5). Below the grid are 'Previous' and 'Next' buttons. A 'Rota Summary' section is visible at the bottom with a 'View Rota' button.

The screen below will open showing your annual and remaining entitlement and any leave booked to date. Click on the '+' icon to apply for new leave:

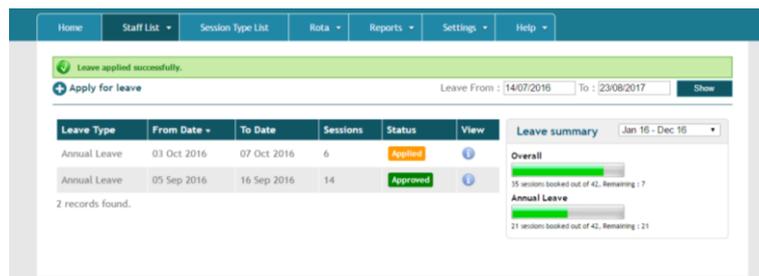


The box that opens is completed in exactly the same way as for administrator added leave so a completed box will look like this:



Note that the number of sessions can be left blank for the administrator to complete once approved.

Click 'Apply' and the screen below opens which now shows the new leave applied for:



The next time the administrator logs in they will see the following screen showing them that they have leave to approve. Click on the link to approve the application.



6. From the new screen, tick the box and click 'Approve Selected' in order to accept the leave request.



Leave Planner

The leave planner is useful for both staff and administrators to plan leave whilst avoiding a clash with other staff members.

Click on 'Reports', 'Leave Planner'

From the screen that opens select the appropriate start date and time period for which you wish to see a report then click 'Show Report'



The report that opens shows a calendar view of all staff members and any leave that has been authorised:

| Jan 2016 | 1 | 4 | 5 | 6 | 7 | 8 | 11 | 12 | 13 | 14 | 15 | 18 | 19 | 20 | 21 | 22 | 25 | 26 | 27 | 28 | 29 |
|------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri |
| Arthur Able | BH | | | | | | | | | | | | | | | | | | | | |
| Bryan Brovine | BH | | | | | | | | | | | | | | | | | | | | |
| Doris Duke | BH | | | | | | | | | | | | | | | | | | | | |
| Charles Campese | BH | | | | | | | | | | | | | | | | | | | | |
| Edith Everage | BH | | | | | | | | | | | | | | | | | | | | |
| Greg Garrett | BH | | | | | | | | | | | | | | | | | | | | |
| Florence Foobles | BH | | | | | | | | | | | | | | | | | | | | |
| Locum | BH | | | | | | | | | | | | | | | | | | | | |

| Feb 2016 | 1 | 2 | 3 | 4 | 5 | 8 | 9 | 10 | 11 | 12 | 15 | 16 | 17 | 18 | 19 | 22 | 23 | 24 | 25 | 26 | 29 |
|------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon |
| Arthur Able | | | | | | | | | | | | | | | | | | | | | |
| Bryan Brovine | | | | | | | | | | | | | | | | | | | | | |
| Doris Duke | | | | | | | | | | | | | | | | | | | | | |
| Charles Campese | | | | | | | | | | | | | | | | | | | | | |
| Edith Everage | | | | | | | | | | | | | | | | | | | | | |
| Greg Garrett | | | | | | | | | | | | | | | | | | | | | |
| Florence Foobles | | | | | | | | | | | | | | | | | | | | | |
| Locum | | | | | | | | | | | | | | | | | | | | | |

| Mar 2016 | 1 | 2 | 3 | 4 | 7 | 8 | 9 | 10 | 11 | 14 | 15 | 16 | 17 | 18 | 21 | 22 | 23 | 24 | 25 | 28 | 29 | 30 | 31 |
|------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed | Thu |
| Arthur Able | | | | | | | | | | | | | | | | | | | | | | | |
| Bryan Brovine | | | | | | | | | | | | | | | | | | | | | | | |
| Doris Duke | | | | | | | | | | | | | | | | | | | | | | | |
| Charles Campese | | | | | | | | | | | | | | | | | | | | | | | |
| Edith Everage | | | | | | | | | | | | | | | | | | | | | | | |
| Greg Garrett | | | | | | | | | | | | | | | | | | | | | | | |
| Florence Foobles | | | | | | | | | | | | | | | | | | | | | | | |
| Locum | | | | | | | | | | | | | | | | | | | | | | | |

A further planner is available which shows leave balances for each staff member. This can be viewed by selecting 'Leave Balance' from the 'Reports' tab and appears as below:

| Staff/Leave Type | Annual Leave | | Special Leave | | Other | | Maternity | | Annual Leave 2 | | Study Leave | | Overall | |
|------------------|--------------|-----------|---------------|-----------|-------|-----------|-----------|-----------|----------------|-----------|-------------|-----------|---------|-----------|
| | Taken | Remaining | Taken | Remaining | Taken | Remaining | Taken | Remaining | Taken | Remaining | Taken | Remaining | Taken | Remaining |
| Arthur Able | 18 | 67 | 0 | 0 | 0 | 0 | 0 | 0 | 9 | -9 | 0 | 0 | 29 | 58 |
| Bryan Brovine | 11 | -11 | 0 | 0 | 0 | 0 | 7 | -7 | 2 | -2 | 0 | 0 | 20 | -20 |
| Doris Duke | 6 | -6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | -6 | 12 | -12 |
| Charles Campese | 8 | -8 | 0 | 0 | 0 | 0 | 0 | 0 | 10 | -10 | 0 | 0 | 18 | -18 |
| Edith Everage | 27 | -27 | 0 | 0 | 0 | 0 | 0 | 0 | 14 | -14 | 0 | 0 | 41 | -41 |
| Greg Garrett | 10 | -10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 10 | -10 |
| Florence Foobles | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Locum | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |