

Self Service User Guide

Absence and Leave

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VERSION HISTORY

Version	Date	Change Summary
1.0	February 2014	
1.1	24 th February 2014	Included information about closing sickness absence.

Introduction

HR Connect is an online Employee Self Service system that provides staff with instant access to their personal data. This data includes, where available and relevant:

- Personal information including your contact details
- Information about your next of kin and emergency contacts
- Bank account details
- Absence and Holiday details, including holiday, sickness and other absence types
- Pay and P60 details, with easy access to payslips and P60 information
- Employment details, including your current and previous jobs
- Higher Education Statistics Agency (HESA) data
- Learning history, including a record of personal learning

Certain information has been retained from previous HR systems and where available and appropriate dates back to 2001.

Staff will also be able to update their own personal information, request leave, book attendance on learning events and record personal learning activities.

Full details of what information can be accessed and updated can be found within the separate manuals covering each area of the system.

Data Protection and Confidentiality

As HR Connect contains detailed personal information it is important that you use it responsibly to ensure that the security of your information is maintained at all times.

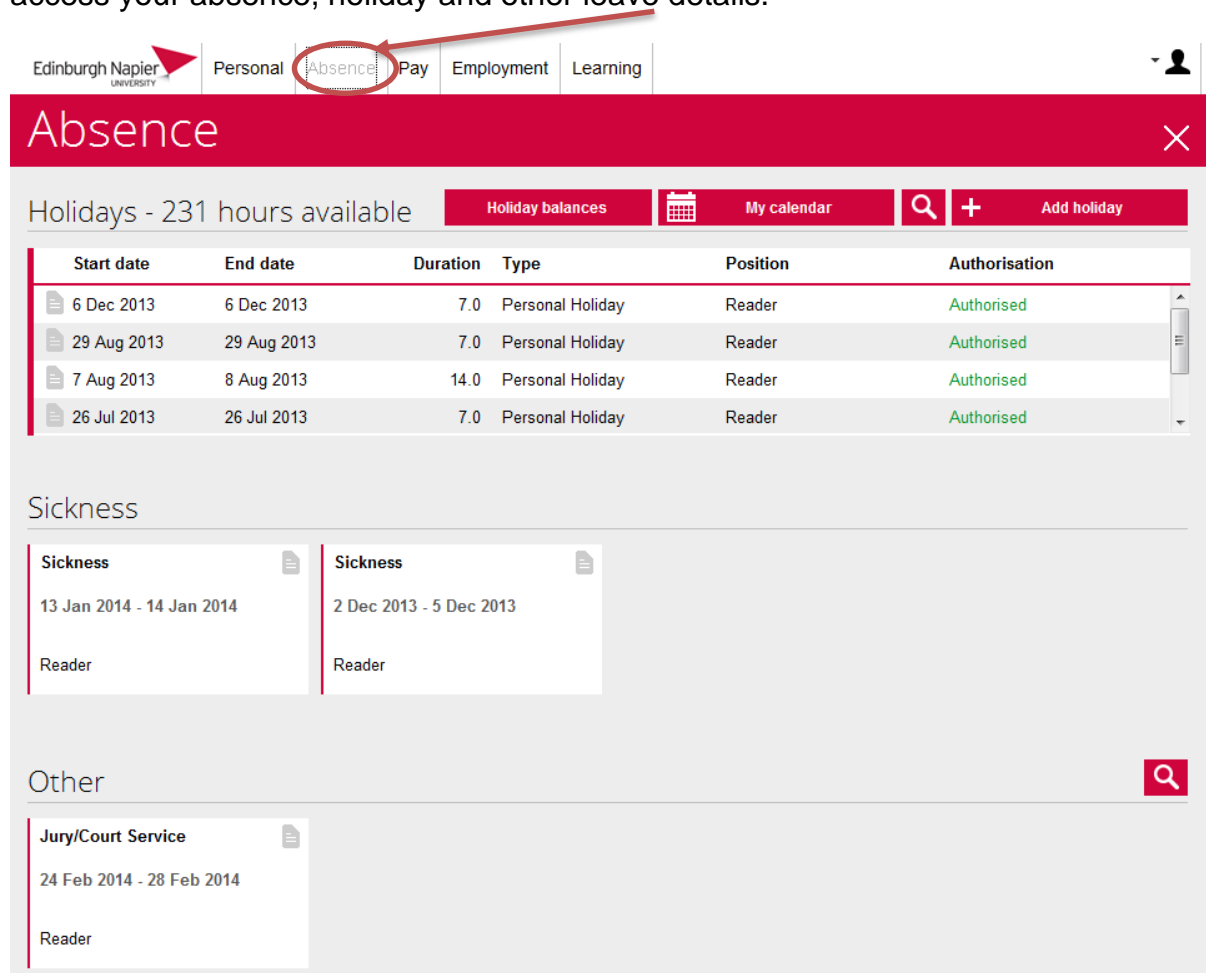
When you have finished using HR Connect please always log out or close your web browser or tab. Unlike other web based systems HR Connect does not retain your login information and you will need to enter your username and password every time you access the system.

It is also important that you never let anyone else know your university username and password as this information would allow people to access your personal information with a risk of identity fraud. If you believe others may be aware of your password please change it immediately.

If at any point you feel that your information security may have been compromised you should contact the University's IT Help Desk in the first instance (ext.3000). More details about information security can be found on the Staff Intranet.

Absence Details Page

Once you have logged onto HR Connect click on the 'Absence' home page link to access your absence, holiday and other leave details.



The screenshot shows the HR Connect interface. At the top, there is a navigation bar with links: Personal, **Absence** (circled in red with an arrow pointing to it), Pay, Employment, and Learning. Below this is a red header bar with the word "Absence" and a close button (X). Under the header, there is a section for "Holidays - 231 hours available" with buttons for "Holiday balances", "My calendar", a search icon, a plus icon, and "Add holiday". Below this is a table of holiday records:

Start date	End date	Duration	Type	Position	Authorisation
6 Dec 2013	6 Dec 2013	7.0	Personal Holiday	Reader	Authorised
29 Aug 2013	29 Aug 2013	7.0	Personal Holiday	Reader	Authorised
7 Aug 2013	8 Aug 2013	14.0	Personal Holiday	Reader	Authorised
26 Jul 2013	26 Jul 2013	7.0	Personal Holiday	Reader	Authorised

Below the holiday table is a section for "Sickness" with two cards:

- Sickness**
13 Jan 2014 - 14 Jan 2014
Reader
- Sickness**
2 Dec 2013 - 5 Dec 2013
Reader

Below the sickness cards is a section for "Other" with a search icon and one card:

- Jury/Court Service**
24 Feb 2014 - 28 Feb 2014
Reader

Your absence records are displayed as a mixture of cards and data grids on the page, depending on the number of records being displayed.

Holidays

Holidays - 231 hours available						
		Holiday balances		My calendar	+	Add holiday
Start date	End date	Duration	Type	Position	Authorisation	
6 Dec 2013	6 Dec 2013	7.0	Personal Holiday	Reader	Authorised	
29 Aug 2013	29 Aug 2013	7.0	Personal Holiday	Reader	Authorised	
7 Aug 2013	8 Aug 2013	14.0	Personal Holiday	Reader	Authorised	
26 Jul 2013	26 Jul 2013	7.0	Personal Holiday	Reader	Authorised	

The Holidays section displays a list of any Personal Holiday, Flexi-Leave and TOIL (where appropriate) both booked and taken. The 'Authorisation' status indicates whether this holiday request has been authorised by your manager. Please note that holiday and other leave that has not yet been authorised will still be deducted from your entitlement balance.

The 'Holidays - number of hours available' will only be shown on the front screen for staff who have a single holiday scheme and as such will normally not be shown for support staff who may be eligible for Flexi-leave and / or Time Off In Lieu (TOIL).

You can click to view, amend or remove only future dated holiday or other leave records. If the start date of the leave record is today's date or earlier you will not be able to click into the record.

Click into any available leave record to view, amend or delete the details. The layout of this screen varies depending on the 'Holiday period' selected.

Holiday details

Absence type

Personal Holiday

Holiday period . Please see help text

More than one day

Start date

04/08/2014

Full or part day

Full day

End date

15/08/2014

Full or part day

Full day

Position

Administrator (28/01/2014, School of

Notes

Authorisation

Awaiting authorisation

Save

Cancel

Delete

Holiday Balances

Click on **Holiday balances** to see an overview of your holiday and other leave entitlements and balances for the current year and selected future years.

Holiday Balances

The balance takes account of all recorded holidays including any awaiting authorisation

Administrator - Flexi-Leave

Holiday Period	Entitlement	Taken	Scheduled	Balance
28 Jan 2014 - 31 Aug 2014 (Part)	0 hours	0 hours	7.25 hours	-7.25 hours
1 Sep 2014 - 31 Aug 2015	0 hours	0 hours	0 hours	0 hours

Administrator - Support Annual Leave

Holiday Period	Entitlement	Taken	Scheduled	Balance
28 Jan 2014 - 31 Aug 2014 (Part)	150.25 hours	29 hours	36.25 hours	85 hours
1 Sep 2014 - 31 Aug 2015	278 hours	0 hours	0 hours	278 hours

Administrator - TOIL

Holiday Period	Entitlement	Taken	Scheduled	Balance
28 Jan 2014 - 31 Aug 2014 (Part)	14.5 hours	0 hours	14.5 hours	0 hours
1 Sep 2014 - 31 Aug 2015	0 hours	0 hours	0 hours	0 hours

Book a holiday


Cancel

Please note that:

- Future years' balances are generated on an annual basis. You cannot view historical balances. If you have any query about these balances, please discuss with your line manager as they can view this information.
- Booked holiday that has not yet been authorised will be included in the 'Taken' or 'Scheduled' figures.
- Under 'Annual leave' the 'Taken' and 'Scheduled' figures include Fixed and Bank Holidays and these are deducted from your entitlement to give the final 'Balance'
- Any entitlement to TOIL must be recorded by your line manager before TOIL leave can be authorised.

Click the **Book a holiday** button to go directly to the holiday booking screen.

My Calendar

Click on  **My calendar** to view a calendar overview of your holiday and other leave taken and booked. Please note that the calendar does not display any sickness or other absence types.

My calendar ✕

Peer Group

☒ Calendar colour options

Day Week Month Today

Previous January 2014 Next

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30 Dr Joseph Bloggs - Bank holiday	31 Dr Joseph Bloggs - Bank holiday	1 Dr Joseph Bloggs - Bank holiday	2 Dr Joseph Bloggs - Bank holiday	3 Dr Joseph Bloggs - Reader Working day	4	5
6 Dr Joseph Bloggs - Reader Working day	7 Dr Joseph Bloggs - Reader Working day	8 Dr Joseph Bloggs - Reader Working day	9 Dr Joseph Bloggs - Reader Working day	10 Dr Joseph Bloggs - Reader Working day	11	12
13 Dr Joseph Bloggs - Reader Working day	14 Dr Joseph Bloggs - Reader Working day	15 Dr Joseph Bloggs - Reader Working day	16 Dr Joseph Bloggs - Reader Working day	17 Dr Joseph Bloggs - Reader Working day	18	19
20 Dr Joseph Bloggs - Reader Working day	21 Dr Joseph Bloggs - Reader Working day	22 Dr Joseph Bloggs - Reader Working day	23 Dr Joseph Bloggs - Reader Working day	24 Dr Joseph Bloggs - Reader Working day	25	26
27 Dr Joseph Bloggs - Reader Working day	28 Dr Joseph Bloggs - Reader Working day	29 Dr Joseph Bloggs - Reader Working day	30 Dr Joseph Bloggs - Reader Working day	31 Dr Joseph Bloggs - Reader Working day	1	2

Book a holiday Cancel

Peer Group

Click into to select any peer group that you are a member of to see an overview of leave for yourself and all other members of the peer group on a single calendar view. This can be useful if you want to see which of your colleagues already have leave booked prior to booking your own leave.

Peer groups are created and maintained by line managers so please discuss with them if you have any queries.

My calendar

Peer Group: School of Testing

Calendar colour options

Day Week Month

Previous March 2014 Next

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
24 Dr Joseph Bloggs - Reader Working day 5 - Working day	25 Dr Joseph Bloggs - Reader Working day 5 - Working day	26 Dr Joseph Bloggs - Reader Working day 5 - Working day	27 Dr Joseph Bloggs - Reader Working day 4 - Working day 1 - Holiday	28 Dr Joseph Bloggs - Reader Working day 4 - Working day 1 - Holiday	1	2
3 Dr Joseph Bloggs - Reader Working day 5 - Working day	4 Dr Joseph Bloggs - Reader Working day 5 - Working day	5 Dr Joseph Bloggs - Reader Working day 5 - Working day	6 Dr Joseph Bloggs - Reader Working day 5 - Working day	7 Dr Joseph Bloggs - Reader Working day 5 - Working day	8	9
10 Dr Joseph Bloggs - Reader Working day	11 Dr Joseph Bloggs - Reader Working day	12 Dr Joseph Bloggs - Reader Working day	13 Dr Joseph Bloggs - Reader Working day	14 Dr Joseph Bloggs - Reader Working day	15	16

Book a holiday Cancel

The coloured boxes indicate the number of colleagues either working, on leave or undertaking training on any day.

Click on the box to show more details and the individuals' names.

Click on **Calendar colour options** to show or hide the colour key.

Calendar colour options

Bank holidays ☒ Holidays ☒ Learning activities ☒

Working patterns ☒

You can also un-tick any item from the key to remove that item from the calendar. By default all items are ticked.

Click on the **Day**, **Week** or **Month** buttons to change the view.

Week view

The Week view is available for either your own or the peer group calendar. The peer group calendar is shown.

My calendar

Peer Group School of Testing

Calendar colour options

Day Week Month

Previous 24 Feb 2014 - 2 Mar 2014 Next

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
24	25	26	27	28	1	2
Dr Joseph Bloggs - Reader Working day	Dr Joseph Bloggs - Reader Working day	Dr Joseph Bloggs - Reader Working day	Dr Joseph Bloggs - Reader Working day	Dr Joseph Bloggs - Reader Working day		
Dr Benjamin Red - Lecturer Working day	Dr Benjamin Red - Lecturer Working day	Dr Benjamin Red - Lecturer Working day	Dr Benjamin Red - Lecturer Working day	Dr Benjamin Red - Lecturer Working day		
Mr Frederick Red - Administrator Working day	Mr Frederick Red - Administrator Working day	Mr Frederick Red - Administrator Working day	Dr Jane Red - Lecturer Working day	Dr Jane Red - Lecturer Working day		
Dr Jane Red - Lecturer Working day	Dr Jane Red - Lecturer Working day	Dr Jane Red - Lecturer Working day	Professor Robert Red - Senior Lecturer Working day	Professor Robert Red - Senior Lecturer Working day		
Professor Robert Red - Senior Lecturer Working day	Professor Robert Red - Senior Lecturer Working day	Professor Robert Red - Senior Lecturer Working day	Ms Sarah Red - Administrator Working day	Ms Sarah Red - Administrator Working day		
Ms Sarah Red - Administrator Working day	Ms Sarah Red - Administrator Working day	Ms Sarah Red - Administrator Working day	Mr Frederick Red - Holiday	Mr Frederick Red - Holiday		

Book a holiday Cancel

Day view

The Day view is available for either your own or the peer group calendar. The peer group calendar is shown.

My calendar

Peer Group School of Testing

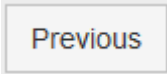
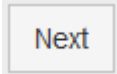
Calendar colour options

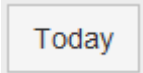
Day Week Month

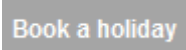
Previous 28 Feb 2014 Next

Name	Role	Status	Period
Dr Joseph Bloggs	Reader	Working day	-
Dr Benjamin Red	Lecturer	Working day	-
Dr Jane Red	Lecturer	Working day	-
Professor Robert Red	Senior Lecturer	Working day	-
Ms Sarah Red	Administrator	Working day	-
Mr Frederick Red	Administrator	Holiday	27/02/2014 - 28/02/2014

Book a holiday Cancel

In all views you can use the  and  buttons to view different months, weeks or days.


Click on the  button to return to the current month, week or day.

Click the  button to jump directly to the holiday booking screen.

Searching for Leave Records

In some instances you may want to search for certain leave records:

- To view specific holiday and leave over a time period
- To include Bank Holiday in the overview
- To view only certain types of leave

To search for leave records click on the  button.

Holiday search

Start date

01/01/2014

End date

28/02/2014

Filter results:

Holiday type

<All>

TOIL

Flexi-Leave

Personal Holiday

Authorisation status

Not refused

Results:

TOIL

27 Feb 2014 - 28 Feb 2014

Duration:14.5

Administrator

Flexi-Leave

12 Feb 2014 - 12 Feb 2014

Duration:7.25

Administrator

Personal Holiday

28 Jan 2014 - 31 Jan 2014

Duration:29

Administrator

Search

Cancel

Please note that only Support Staff are eligible for Time Off In Lieu (TOIL) and Flexi-Leave and these are at manager's discretion.

Either the start date, end date or both can be left blank to return all results, or results to or from a certain date.

The '*Holiday Type*' list will only be generated once you have searched and will only include holiday types that occur within the selected dates. If you wish to filter for multiple holiday types you can do so by using the 'Ctrl' button on your keyboard.

Unlike the overview data grid on the front screen, the '*Holiday search*' will also show all fixed and bank holidays.

You can click to view, amend or remove only future dated holiday records. If the start date of the holiday is today's date or earlier you will not be able to click into the record. Any amendment to this record must be done by your line manager. Additionally you will not be able to click into any Bank Holiday records.

Holiday details
✕

Absence type

Personal Holiday

Holiday period - Please see help text

More than one day

Start date

04/08/2014

Full or part day

Full day

End date

15/08/2014

Full or part day

Full day

Position
Administrator (28/01/2014, School of

Notes

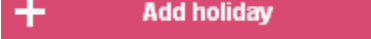
Authorisation
Awaiting authorisation

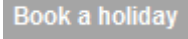
Save

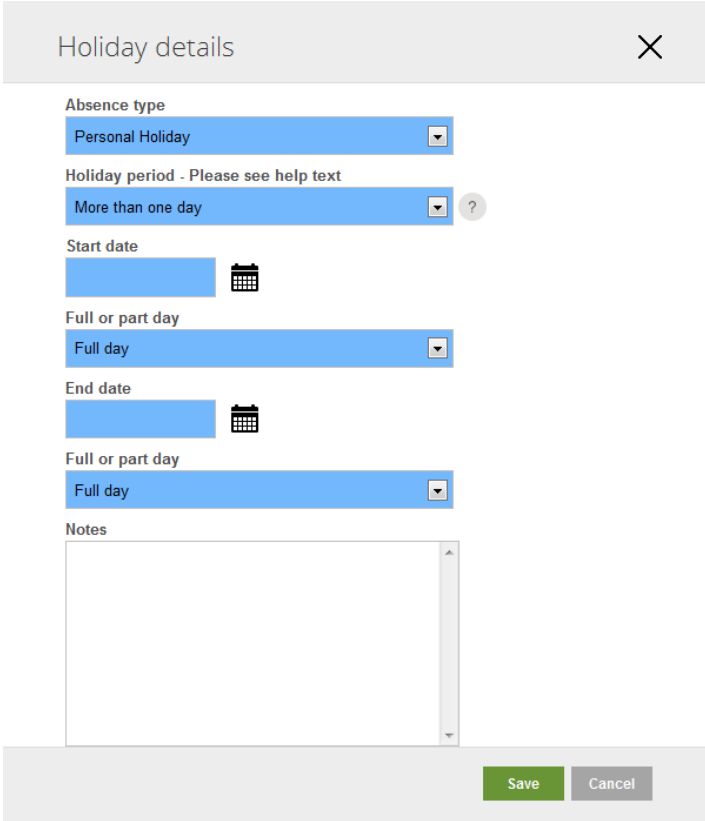
Cancel

Delete

Request a period of Holiday or Other Leave

To request Holiday or other Leave click on the  button on the 'Absence' home page.

You can also click on the  button in the 'My Calendar' or Holiday balances screens.



The absence type will be restricted to Personal Holiday for Academic staff. Support Staff may also request Flexi-Leave and Time Off In Lieu (TOIL).

Complete the details, noting that date and time fields will appear differently depending on the Holiday Period Selected.

Record the appropriate dates and, if booking a part day, times for your holiday.

Any notes recorded will be sent to your manager as part of the holiday request e-mail.

It is very important to note that when booking personal holidays or other leave around a bank holiday period you **must not** book the bank holiday date(s) itself as your entitlement will be reduced twice for these days.

For example if you were to book a fortnight's holiday over Easter 2014 and booked from the 14th to the 25th April the system would deduct 10 days' worth of hours from your entitlement (depending on your work pattern).

However your entitlement has already been reduced by three days to cover the three fixed holidays within this period (14th, 18th and 21st April), so you would effectively have these hours deducted twice.

To correctly record this holiday and avoid having the hours deducted twice you would need to book two holidays, one from the 15th to the 17th April and one from the 22nd to the 25th April.

Sickness Absence

Sickness

Sickness 13 Jan 2014 - 14 Jan 2014 Reader	Sickness 2 Dec 2013 - 5 Dec 2013 Reader
---	---

The Sickness section displays a list of any recorded sickness absence. This section will display as either a card or grid depending on the number of absences recorded. Click on any card, or line on the grid to view or update the details of any sickness recorded for you.

Clicking into an existing absence record will display the full details of the absence record.

Sickness Details X

Absence type
Sickness

Absence reason
Cold/Cough/Flu

Absence period
More than one day

First day of absence
18/12/2006

Was the first day of absence a full day or the afternoon only?
Full day

Last day of absence
20/12/2006 ?

Was the last day of absence a full day or the morning only?
Full day

Position

Save

Cancel

Closing or Changing a Sickness Absence Record

When you report a period of sickness absence to your manager or other Sickness Contact, they will record an open ended sickness with no end date recorded. On the day that you return to work you should complete the Last day of absence by clicking onto the Sickness Absence record that does not have an end date.

You only need to update the '*Absence Reason*' if it was not correctly recorded at the time that you notified your manager or Sickness Contact about your absence.

The absence reasons are grouped and are not designed to represent a specific illness. Please select the reason that most closely represents your actual reason for absence, for example tonsillitis would be recorded as Ear/Nose/Throat.

Once you have updated the reason and before changing any other value please select the correct '*Absence Period*' as either '*Part Day*' (only if you were absent for less than one day), '*Full Day*' (if you were absent for exactly one day) or '*More than one day*' if you were absent for more than a single day, even if this includes any part days.

The screen will update depending on your selection of '*Absence Period*'.

Part Day

Sickness Details
×

Absence type

Absence reason

Absence period

First day of absence

Were you absent for the Morning or the Afternoon?

Position

When '*Part Day*' is selected you do not need to record an end date as this will always be the same as your start date. You only need to record whether you were absent in the morning or afternoon.

Sickness Details ×

Absence type

Sickness

Absence reason

Ear/Nose/Throat

Absence period

Full day

First day of absence

03/03/2014

Position

Administration Officer (01/01/2008, A

Save

Cancel

When '*Full day*' is selected you do not need to record an end date as this will always be the same as your start date, and no further information is required.

More than One Day

Sickness Details
×

Absence type

Absence reason

Absence period

First day of absence

Was the first day of absence a full day or the afternoon only?

Last day of absence
  ?

Please enter the date that you were last absent, not the date that you returned to work.


Was the last day of absence a full day or the morning only?

Position

When 'More than one day' is selected you need to record the date of the Last day of your absence, and can also record if the first or last day of your absence were for less than a day (for example you left or returned at lunch).

Please note that if you work part time you should not record a Morning or Afternoon absence if you were off for a full working day. For example if you work 3 hours in the morning and are not in on that day, you should not record that as a half day morning absence. You would only do that if you were absent for the first hour and a half.


Other absence

Other 

Jury/Court Service
24 Feb 2014 - 28 Feb 2014
Reader


The Other absence section displays a list of any other absences recorded in the system. This will include medical appointments, jury service, public duties, compassionate leave and the like. It does not include maternity or adoption leave which are not accessible through the HR Connect Employee Self Service system.

Click into any record to view the details.


Other Absence Details 

Absence type
Jury/Court Service

Absence period
More than one day

Start date
24/02/2014 

Full or part day
Full day

End date
28/02/2014 

Full or part day
Full day

Position
Reader (01/12/2008, School of Testir

Cancel

These records cannot be updated in the Employee Self Service system.

HR Connect Help and Support

If any of your information is incorrect or out of date and you do not have access to update the information yourself please contact your manager in the first instance.

If you need any help, advice or assistance with the system please contact the HR Systems Team on ext. 3728 or email HRConnect@napier.ac.uk