THE UNIVERSITY of EDINBURGH

People and Money system

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Before you begin:

Read the Guide to Annual Leave.

If you hold multiple assignments, please refer to the user guide titled 'Employee Guide: How to request annual leave as a multiple assignment holder'.

It is your responsibility to check that your annual leave balance is accurate and to speak to your line manager (or school/department administrator) if you think it is incorrect. Before querying anything, it is important to make sure that all annual leave dates have been entered on the system.

The Annual Leave Policy states you can't carry over a negative leave balance into the following year, i.e.. you can't borrow leave from the next year's allowance. The system is set up to prevent anyone going into a negative balance and will show an error where this occurs.

If you have any questions about your annual leave balance please speak to your line manager or school/department administrator.

In Brief…

Requesting annual leave:

1. From the Home page, select the **Navigator** ☰ menu on the top left icon

2. Open the **Me** section, then select **Time and Absences** ⏲ Time and Absences

3. Select **Absence Balance** to check that you have enough leave remaining for the year before applying for more leave.
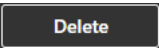
Note: Here you can select your **Balance As-of Date** as **Current date** or **Last Calculation date** (until the end of the year including pre-booked holidays such as Christmas holidays), **the system defaults to Last Calculation date view.**

4. Press **Back** ⟨ and select **Team Schedule** to check department availability to check that your leave does not clash with that of other team members' where possible.

5. Press **Back** ⟨ again and select **Add Absence**

6. Select the absence **Type** from drop down, and for booking annual leave, select **Leave.**

7. Enter the **Start Date** and **End Date,** ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of 7 working hours per day

   Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

8. Then, press **Submit** [Submit]

9. If you hold multiple assignments, you can book leave for select assignments:

   a. Follow steps 1 & 2 and then select **Add Absence**

   b. Select the Absence Type as **Leave**

   c. In the When section, select **Edit Entries** [Edit Entries], then **Add** [+ Add]

   d. Select the **Date** and **Assignment** as appropriate

   e. Then click **OK** [OK]

   Note: If you hold multiple assignments and want to apply leave to all assignments, just enter the dates on the first screen without selecting Edit Entries (please refer the user guide titled 'Employee Guide: How to request annual leave as a multiple assignment holder'_

10. If you hold multiple assignments and accidentally booked leave for all assignments, you can edit your leave request:

    a. Go to **Existing Absences**

    b. Click on the **Pencil icon** ✎ next to the assignment you don't want the absence record against

    a. Click on **Edit Entries** [Edit Entries]

    b. Then select **Delete** [Delete] against each entry

11. Add any **Comments and Attachments** to the leave request and **Submit** [Submit] .

For detailed guidance, see the [next section](#).
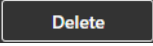
Amending annual leave:

1. From the Home page, select the **Navigator** ☰ menu on the top left icon.

2. Open the **Me** section, then select **Time and Absences** 🕐

3. Select **Existing Absences** and click on the **Edit** ✎ icon next to the leave request you would like to amend

   Note: To quickly find the absence you're looking for, **enter the type or status** of the absence into the keyword search bar on the absence page.

   [Search by type or status 🔍]

4. **If the type of leave you're applying for is the same** and you only wish to amend the dates, enter the new **Start Date** and **End Date,** ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of 7 working hours per day

   Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

5. **If the type of leave you're applying for is different** to the original leave, **Delete** [Delete] the original absence and re-apply for the new leave as per the section above
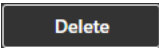
6. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
   a. Go to **Existing Absences**
   b. Click on the **Pencil icon** ✎ next to the assignment you don't want the absence record against
   c. Click on **Edit Entries** [Edit Entries]
   d. Then select **Delete** [Delete] against each entry

      Note: please refer the user guide titled 'Employee Guide: How to request annual leave as a multiple assignment holder'

7. Add any additional **Comments and Attachments** to the original leave request and **Submit** [Submit] .

For detailed guidance, see the [next section](#).

Cancelling annual leave:

1. From the Home page, select the **Navigator** ☰ menu on the top left icon.

2. Open the **Me** section, then select **Time and Absences** 🕐

3. Select **Existing Absences** and click on the **Edit** ✎ icon next to the leave request you would like to cancel

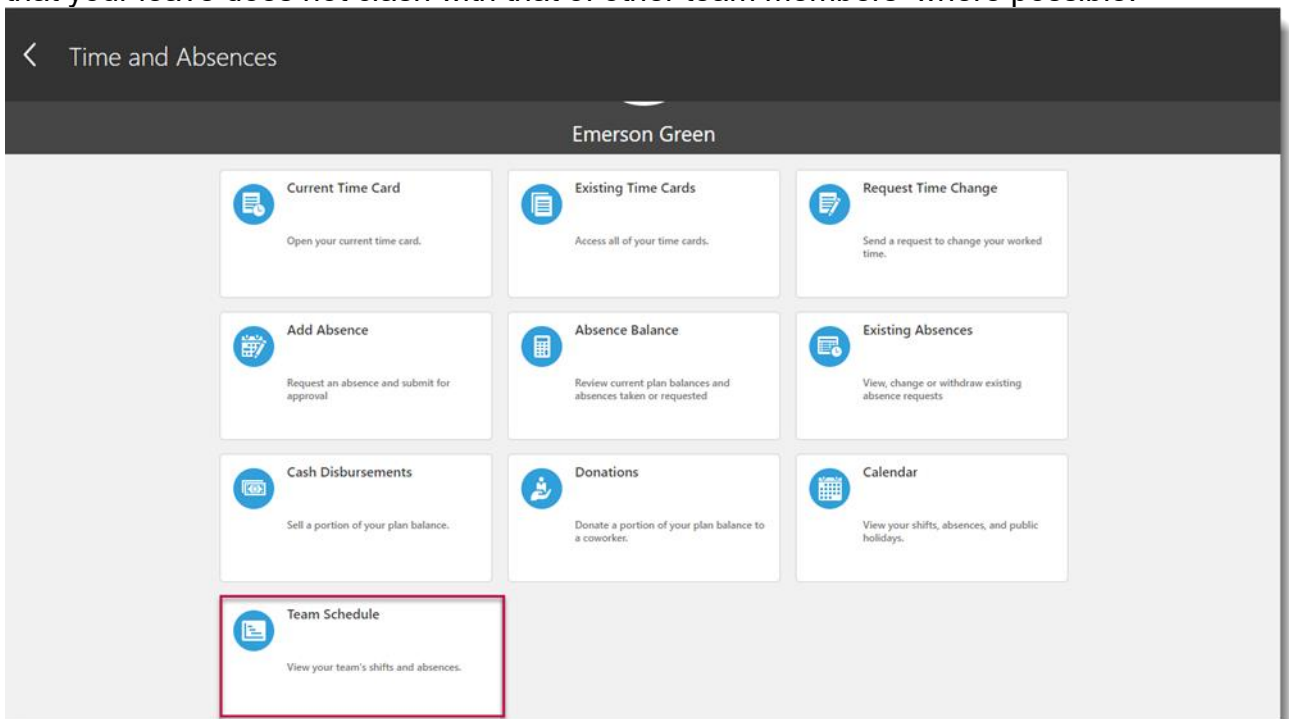4. Click on **Delete** [Delete] on the top bar. You see that the status against that leave request will say 'Withdrawn'.

   Note: Past annual leave requests can only be deleted by your Line Manager.

For detailed guidance, see the [next section](#).

In Detail...

Requesting annual leave:

1. From the Home page, select the **Navigator** menu on the top left icon.
2. Open the **Me** section, then select **Time and Absences**

3. Select **Absence Balance** to check that you have enough leave remaining for the year before applying for more leave
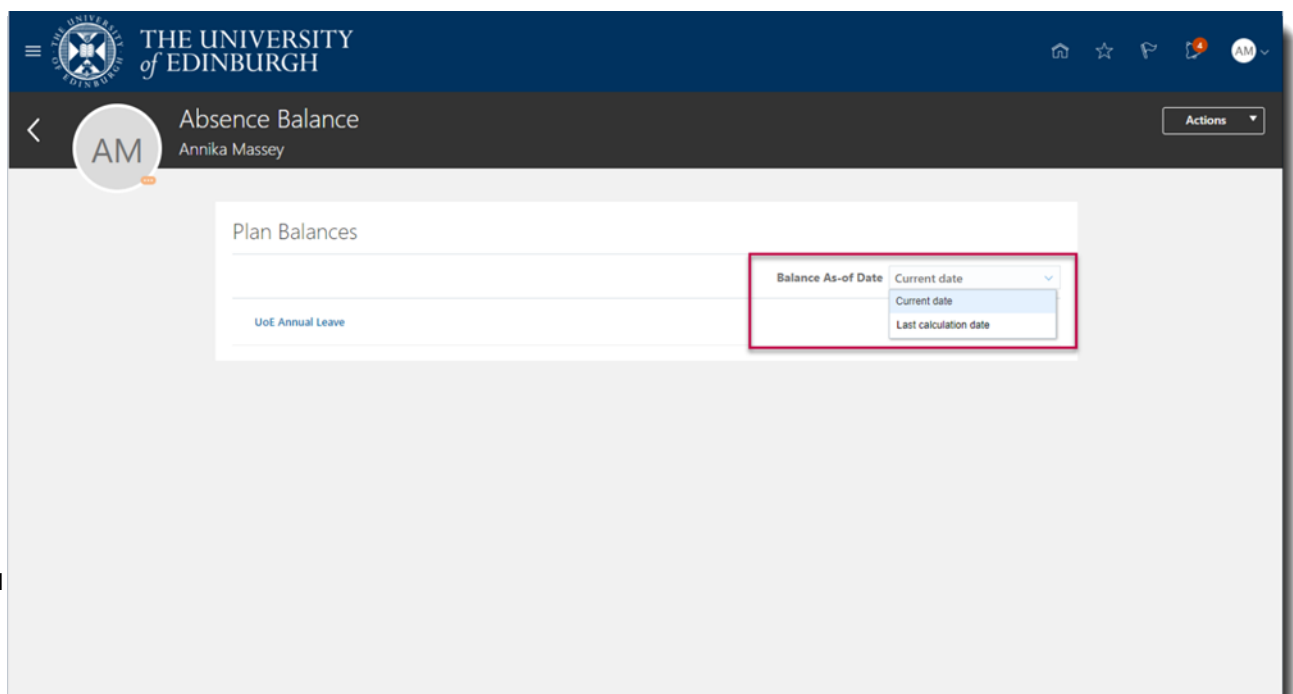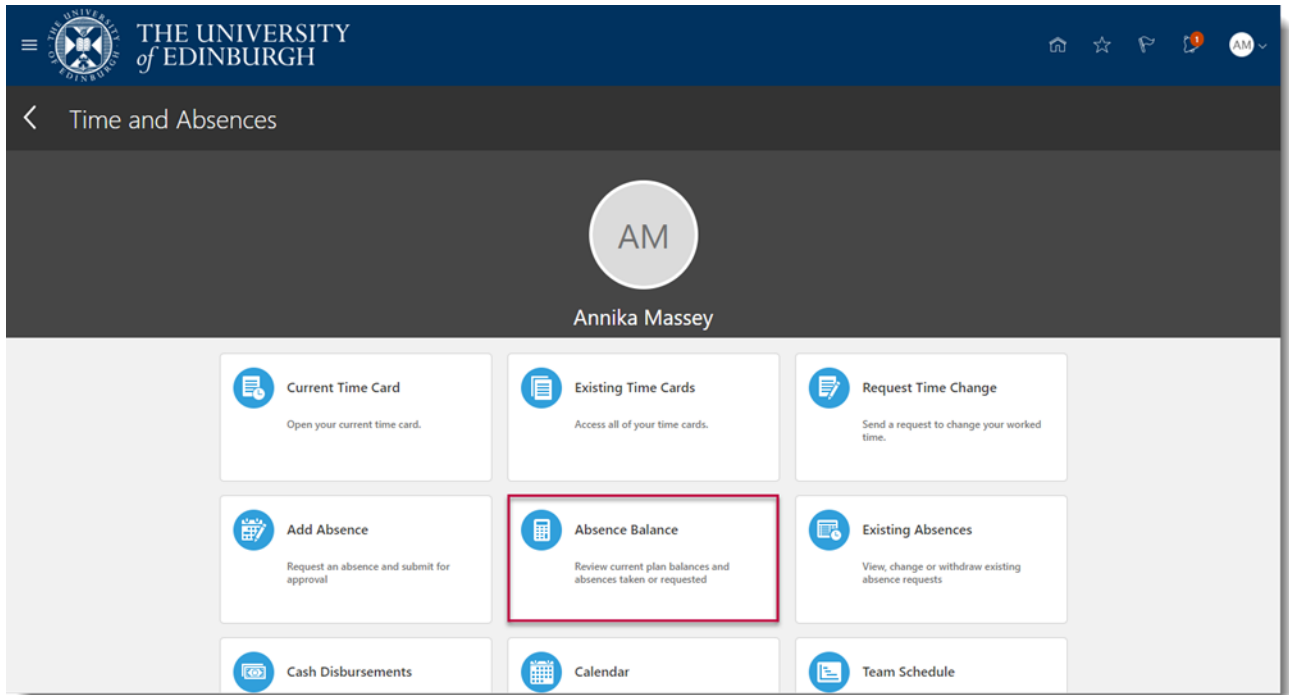
Note: Here you can select your **Balance As-of Date** as **Current date** or **Last Calculation date** (until the end of the year including pre-booked holidays such as Christmas holidays), the default view will be Last Calculation Date.

4. Press **Back** and select **Team Schedule** to check department availability to check that your leave does not clash with that of other team members' where possible.

5. Press **Back** again and select **Add Absence**

6. Select the absence **Type** from drop down, and for booking annual leave, select **Leave**

7. Enter the **Start Date** and **End Date,** ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day)

Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

8. Then, press **Submit**

9. If you hold multiple assignments, you can book leave for select assignments:

    a. Follow steps 1 & 2 and then select **Add Absence**

    b. Select the Absence Type as **Leave**

    c. In the When section, select **Edit Entries**

d. Then select **Add**

c. Select the **Date** and **Assignment** as appropriate

d. Then click **OK**

Note: If you hold multiple assignments and want to apply leave to all assignments, just enter the dates on the first screen without selecting Edit Entries.

10. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
    a. Go to **Existing Absences**

b. Click on the **Pencil icon** next to the assignment you don't want the absence record against

c. Select **Edit Entries**, then click on the pencil icon against the individual entry you would like to edit/delete

d. Select **Delete** against each entry

11. Add any **Comments and Attachments** to the original leave request and **Submit**.

Note: Especially while applying for **half day leave**, mention in the comments what **time** you would like to apply leave for.

Be aware that by selecting **Save and Close** instead of **Submit** at this stage the request is <u>not</u> submitted to your Line Manager but instead it will show in the **Existing Absences page** as **Saved**.
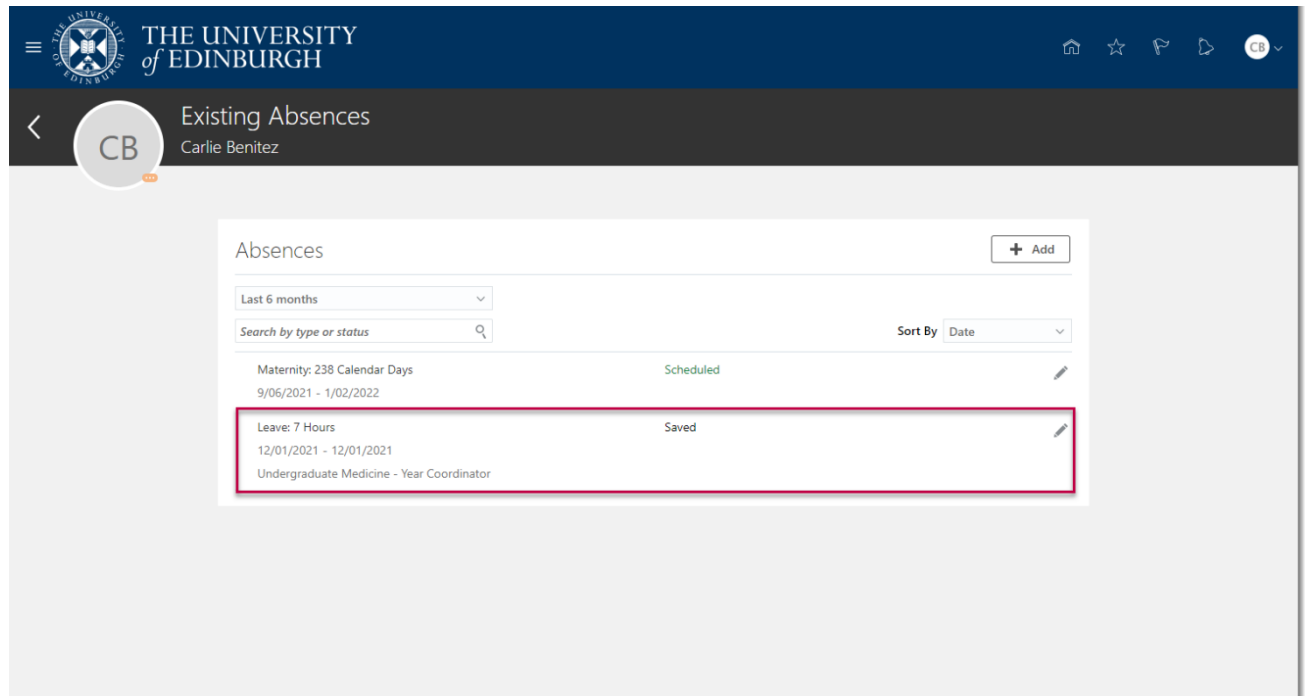
If you would like to complete the request simply click the pencil icon to the right of the saved request. You can then edit the absence, **Submit** will confirm the request with your Line Manager as normal or **Delete** will remove it completely.
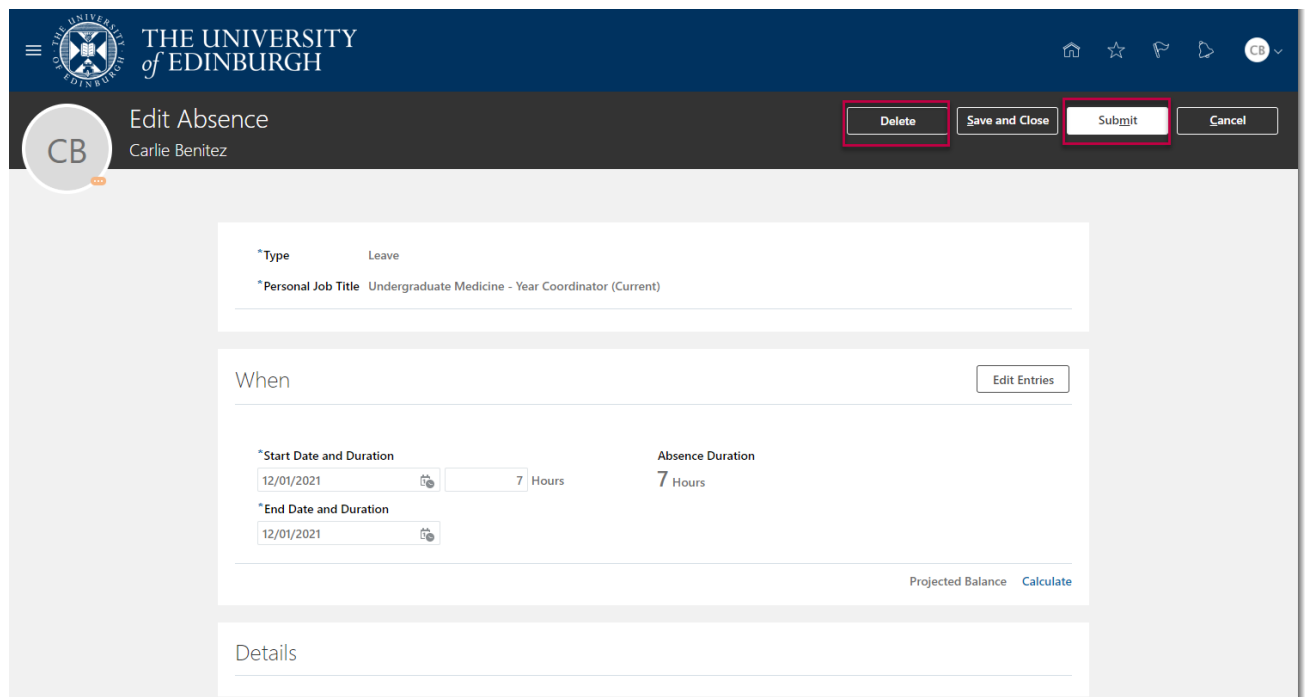
Amending annual leave:
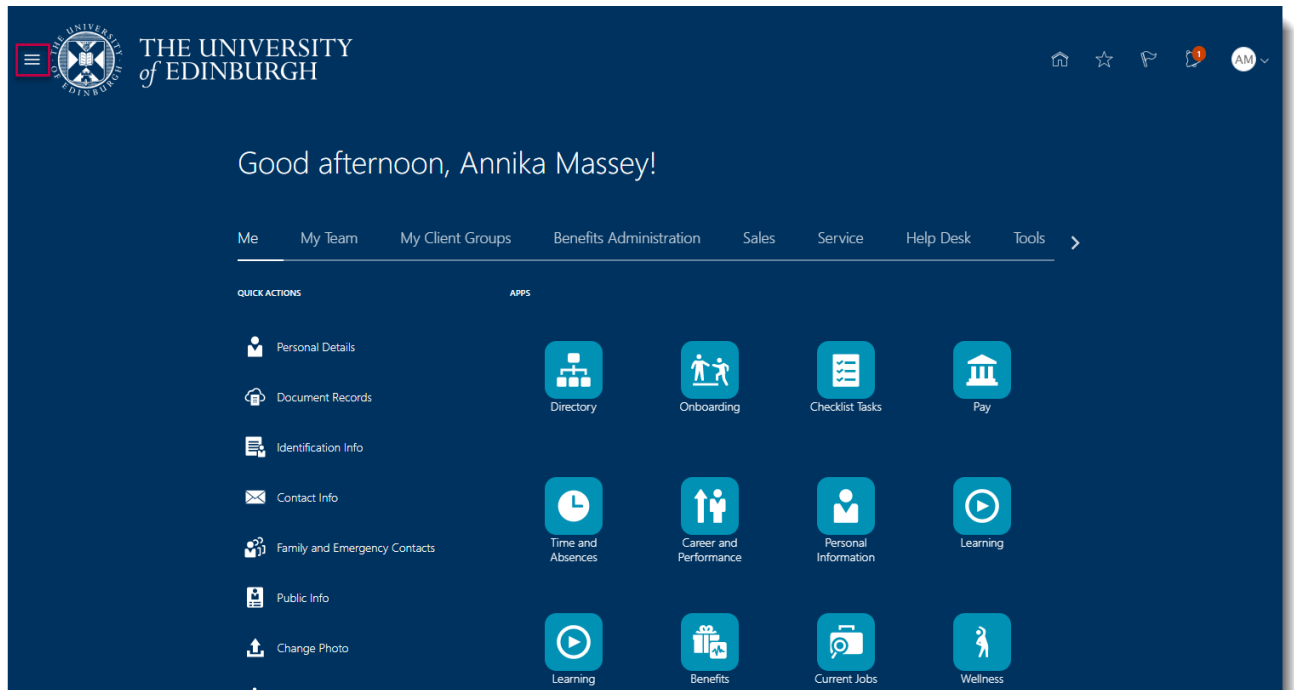
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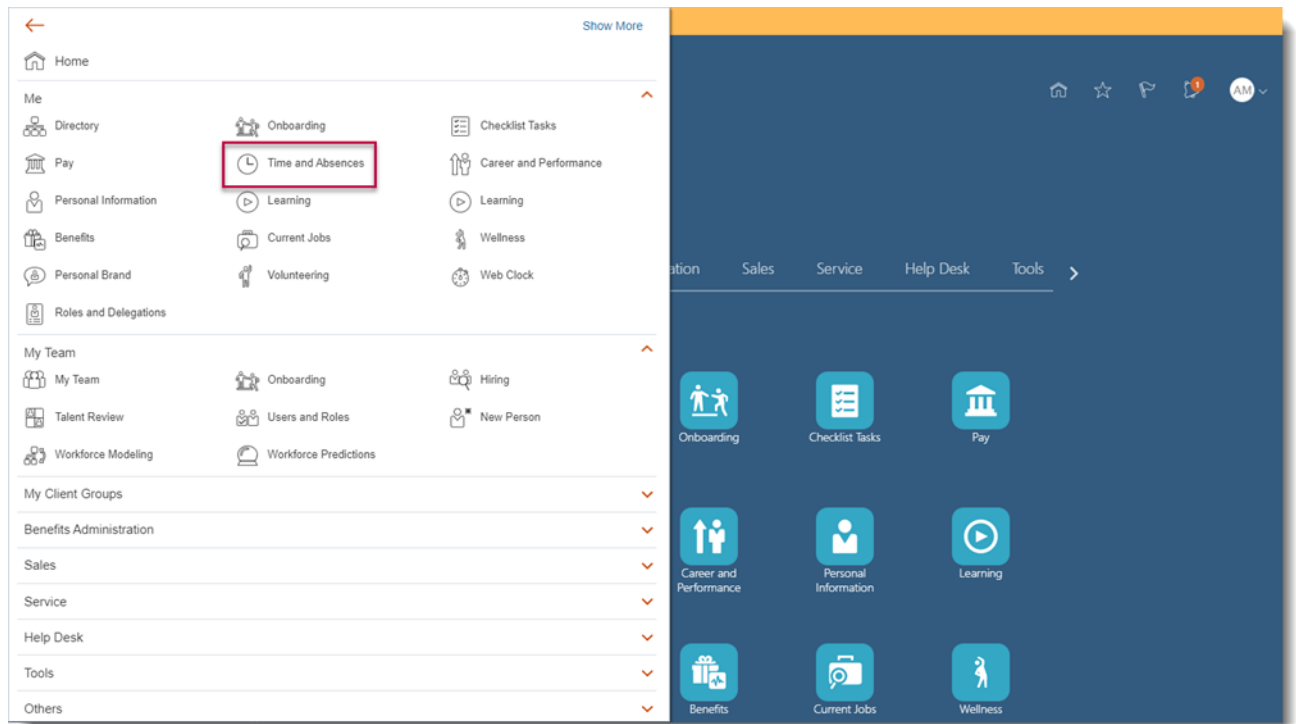
3. Select **Existing Absences** and click on the **Edit** icon next to the leave request you would like to amend
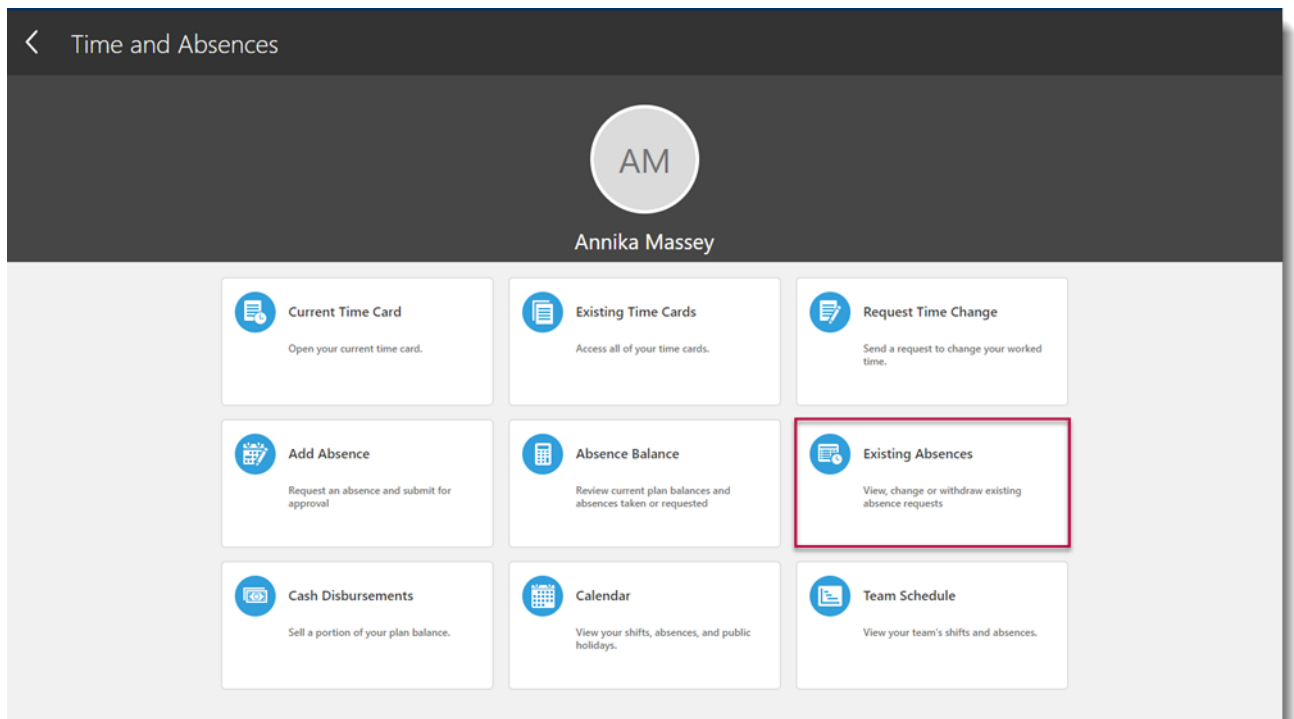
Note: To quickly find the absence you're looking for, **enter the type or status** of the absence into the keyword search bar on the absence page.

4. **If the type of leave you're applying for is the same** and you only wish to amend the dates, enter the new **Start Date** and **End Date,** ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day)
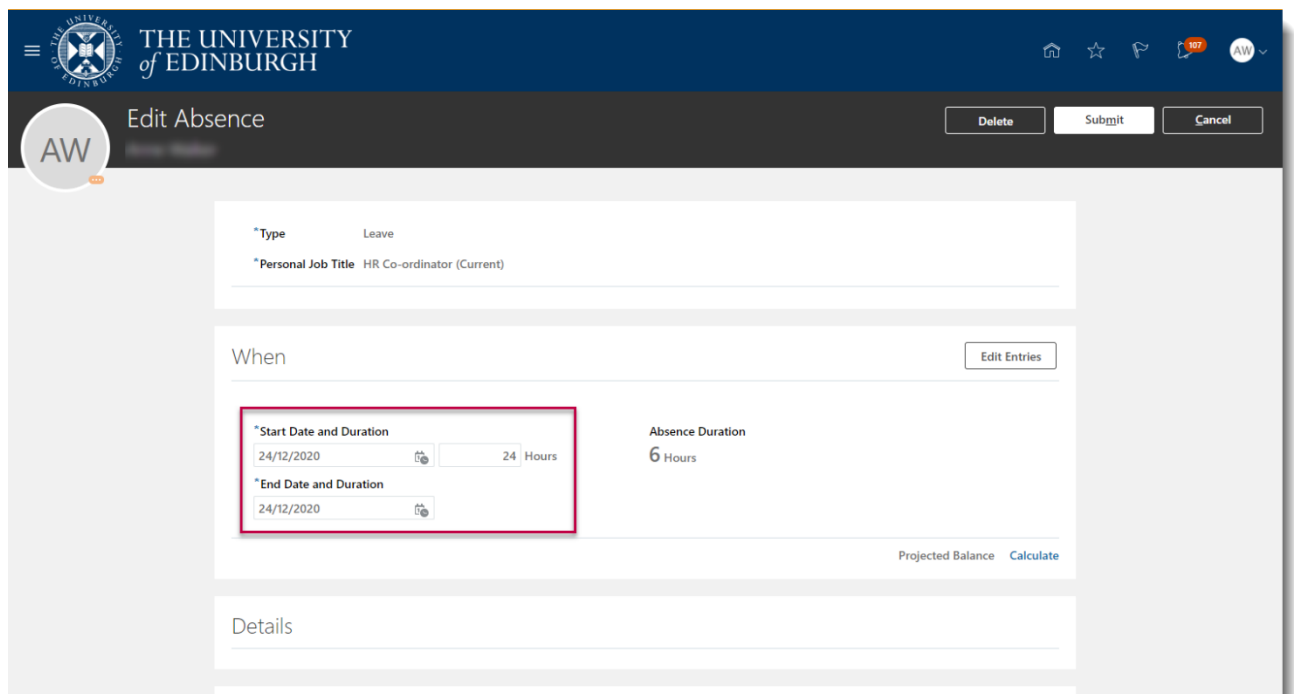
Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments. For example, below is applying for three days of annual leave from 16-

18 September but her Absence Duration shows up as 42 hours instead of 21 hours (as the work pattern dictates 7 working hours per day).

5. **If the type of leave you're applying for is different** to the original leave, **Delete** the original absence and re-apply for the new leave as per the section above

6. If you hold multiple assignments, ensure you're requesting leave for the right assignment:

   a. Go to **Existing Absences**

b. Click on the **Pencil icon** next to the assignment you don't want the absence record against

c. Select **Edit Entries**, then click on the pencil icon against the individual entry you would like to edit/delete

d. Then select **Delete** against each entry

7. Add any additional **Comments and Attachments** to the original leave request and **Submit**.
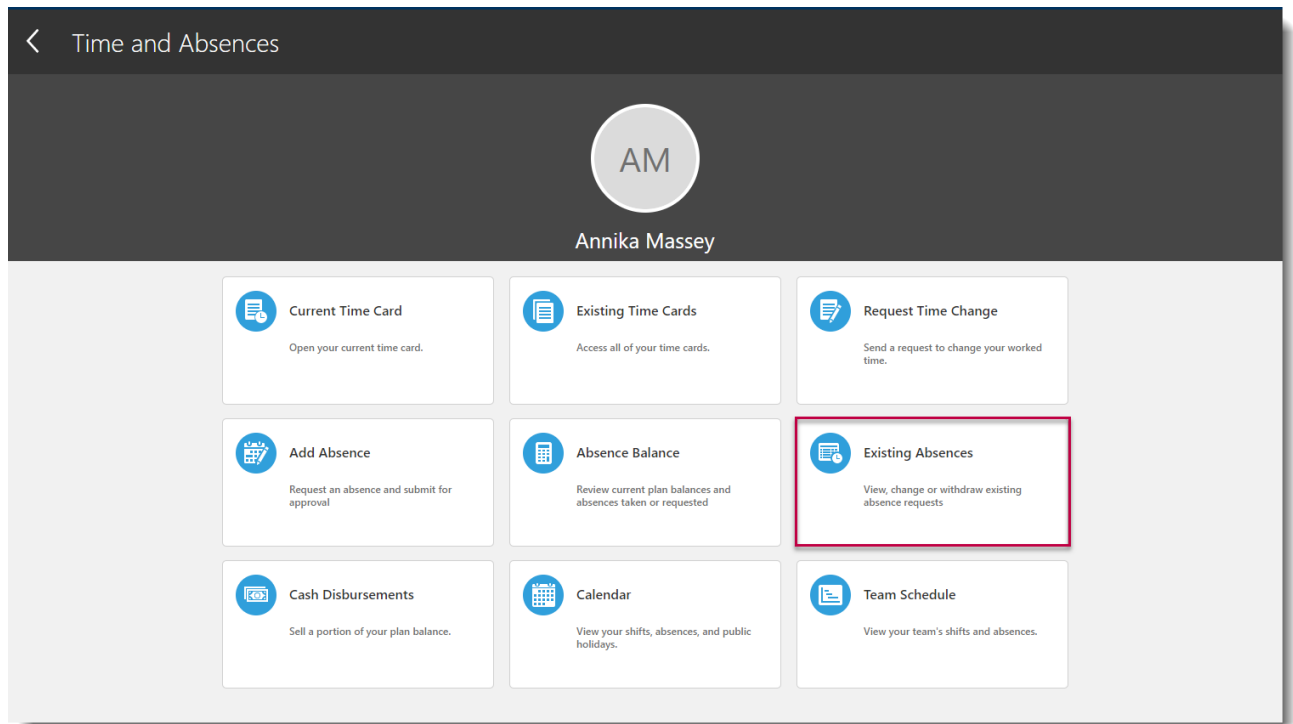

Cancelling annual leave:

1. From the Home page, select the **Navigator** menu on the top left icon

2. Open the **Me** section, then select **Time and Absences**

3. Select **Existing Absences** and click on the **Edit** icon next to the leave request you would like to cancel

4. Click on **Delete** on the top bar. You see that the status against that leave request will say 'Withdrawn'.