



People and Money system

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Employee Guide- How to Request, Cancel and Amend Annual Leave

Employee

Estimated time to complete: 2 minutes

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.



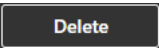
Note: Here you can select your **Balance As-of Date** as **Current date** or **Last Calculation date** (until the end of the year including pre-booked holidays such as Christmas holidays), **the system defaults to Last Calculation date view.**

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** 
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** , then **Add** 
 - d. Select the **Date** and **Assignment** as appropriate
 - e. 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 (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** 
 - b. Then select **Delete**  against each entry


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

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

Amending annual leave:

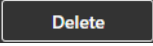
1. From the Home page, select the **Navigator**  menu on the top left icon.
2. Open the **Me** section, then select **Time and Absences** .
3. Select **Existing Absences** and click on the **Edit**  icon next to the leave request you would like to amend


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.



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**  the original absence and re-apply for the new leave as per the section above




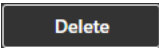
6. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
 - a. Go to **Existing Absences**
 - b. Click on the **Pencil icon**  next to the assignment you don't want the absence record against
 - c. Click on **Edit Entries** 
 - d. Then select **Delete**  against each 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** .

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

Canceling 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'.

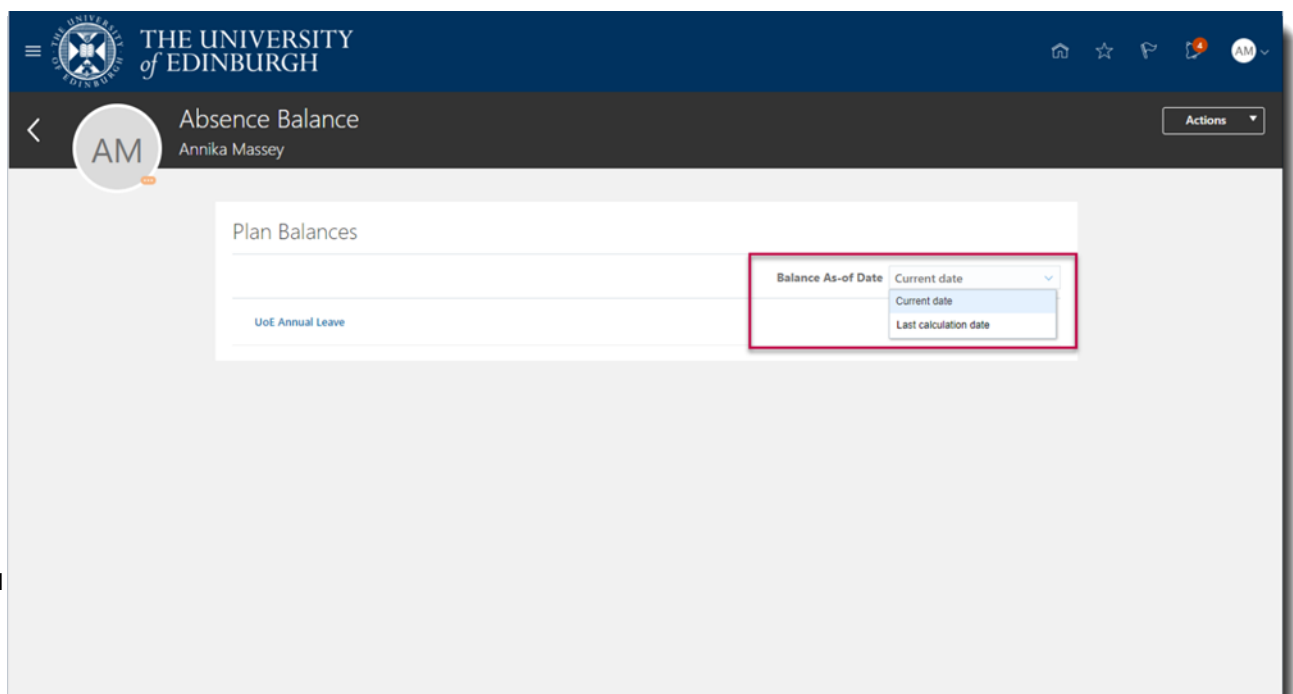
Note: Past annual leave requests can only be deleted by your Line Manager.

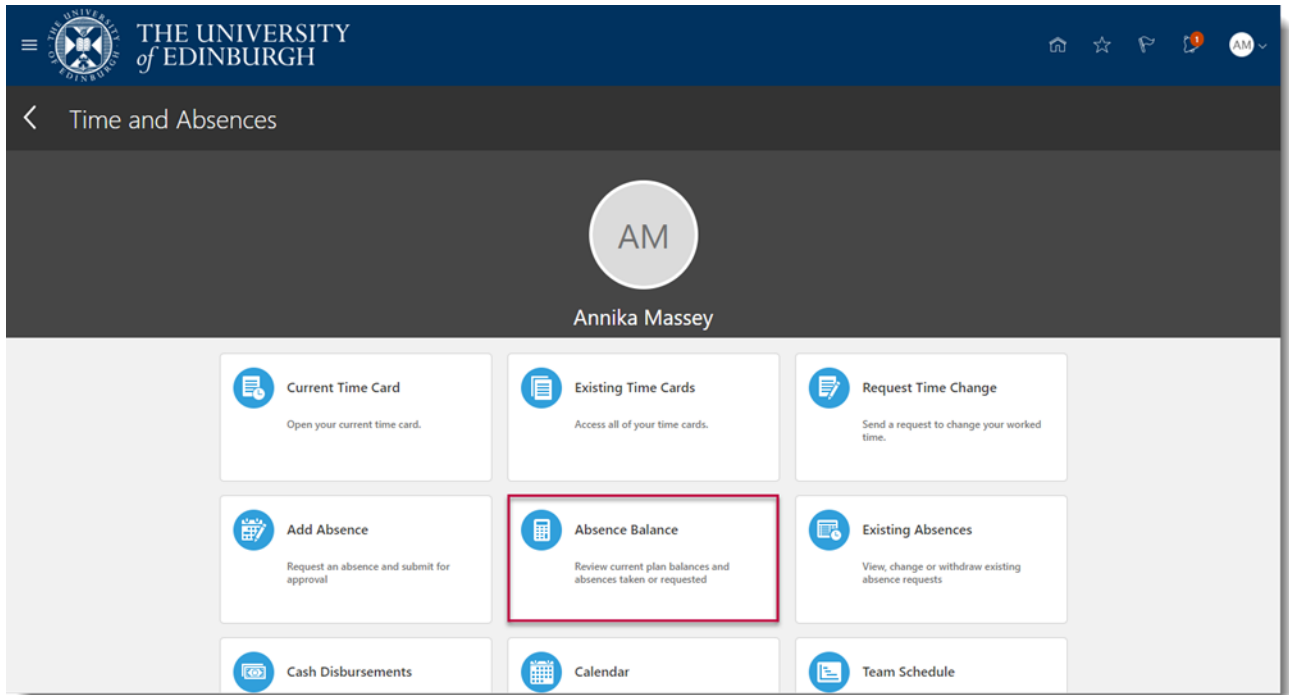
For detailed guidance, see the [next section](#).

In Detail...

Requesting annual leave:

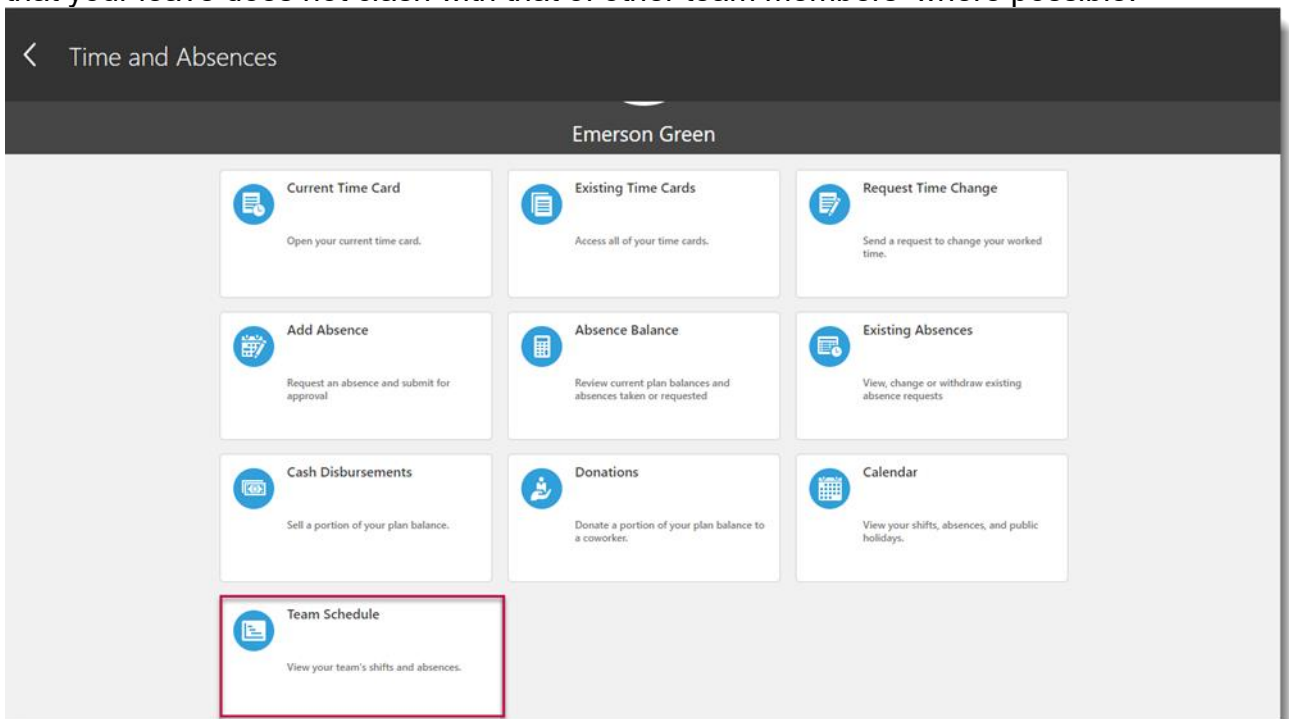
1. From the Home page, select the **Navigator** menu on the top left icon.
2. Open the **Me** section, then select **Time and Absences**
3. Select **Absence Balance** to check that you have enough leave remaining for the year before applying for more leave



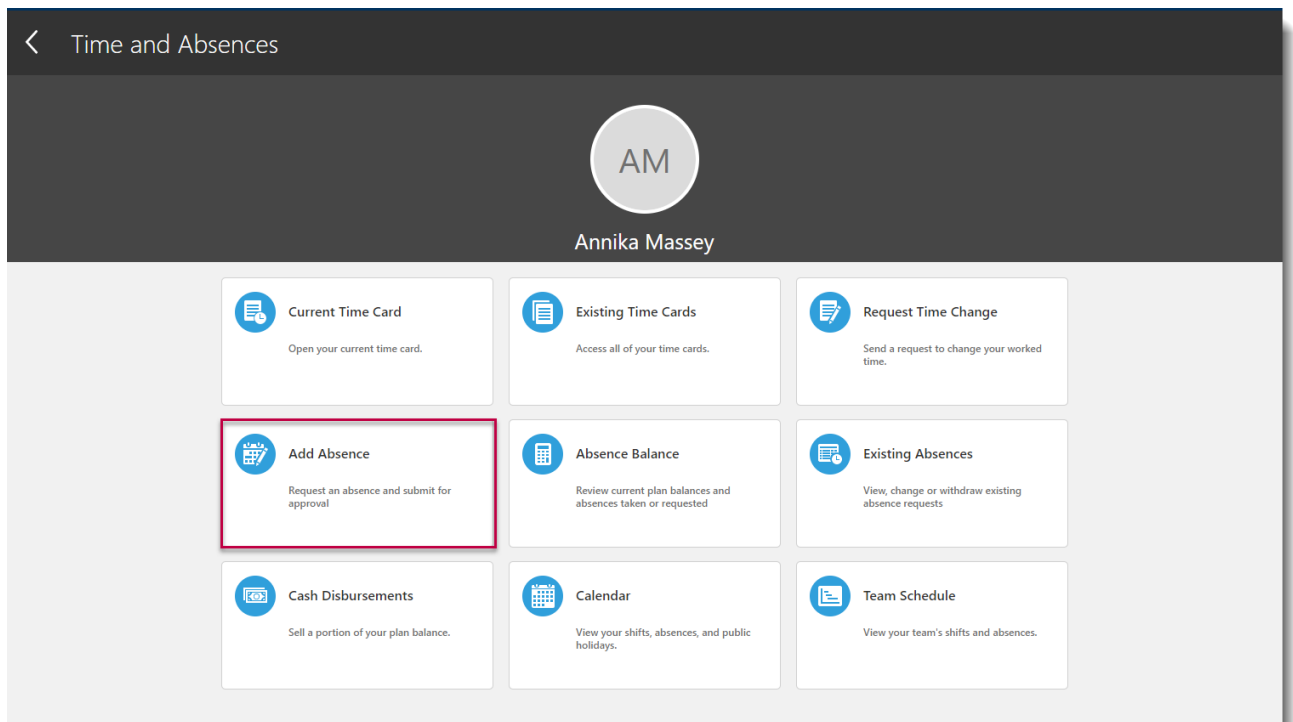


Note: Here you can select your **Balance As-of Date** as **Current date** or **Last Calculation date** (until the end of the year including pre-booked holidays such as Christmas holidays), the default view will be Last Calculation Date.

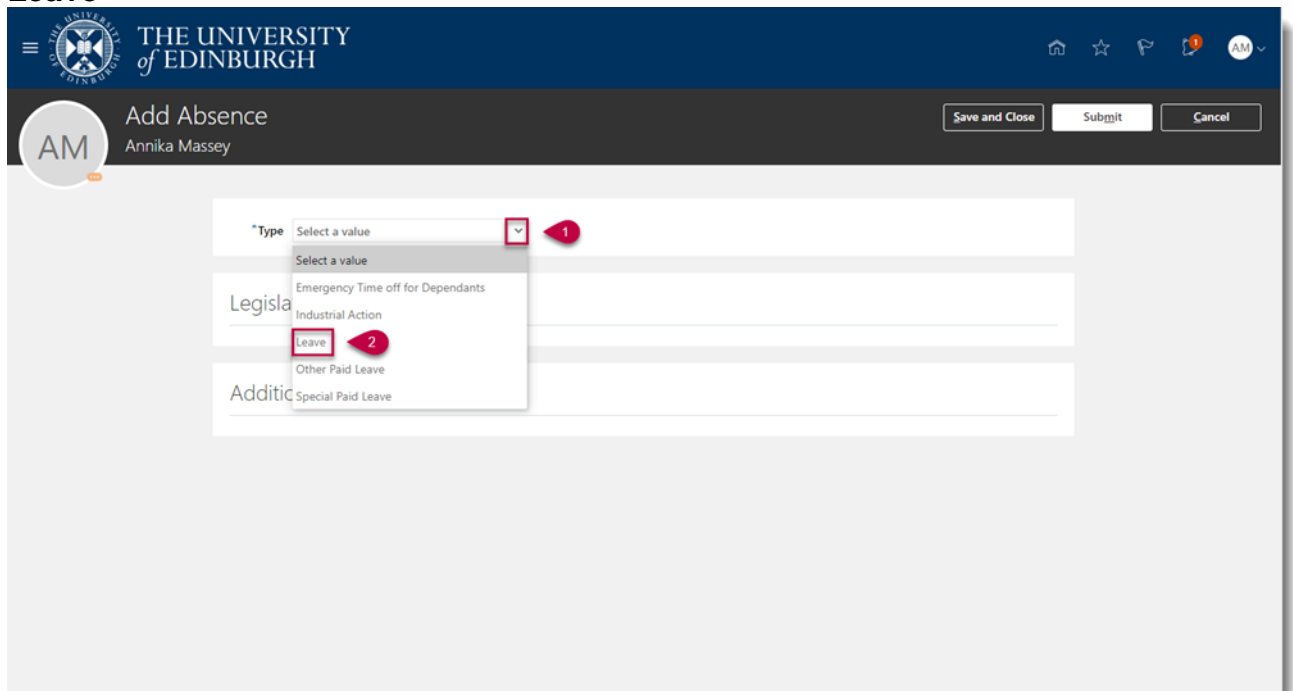
4. Press **Back** and select **Team Schedule** to check department availability to check that your leave does not clash with that of other team members' where possible.



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**

THE UNIVERSITY of EDINBURGH

EG Emerson Green

*Type Leave

Absence Type Balance 96.8 Hours

When + Add

There's nothing here so far.

Details

Comments and Attachments

Comments

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

EG Emerson Green

*Type Leave

Absence Type Balance 96.8 Hours

When

Duration in Hours

*Date dd/mm/yyyy

Assignment Select a value

Absence Duration 0 Hours

Total Absence Duration 0

Projected Balance Calculate

Details

Comments and Attachments

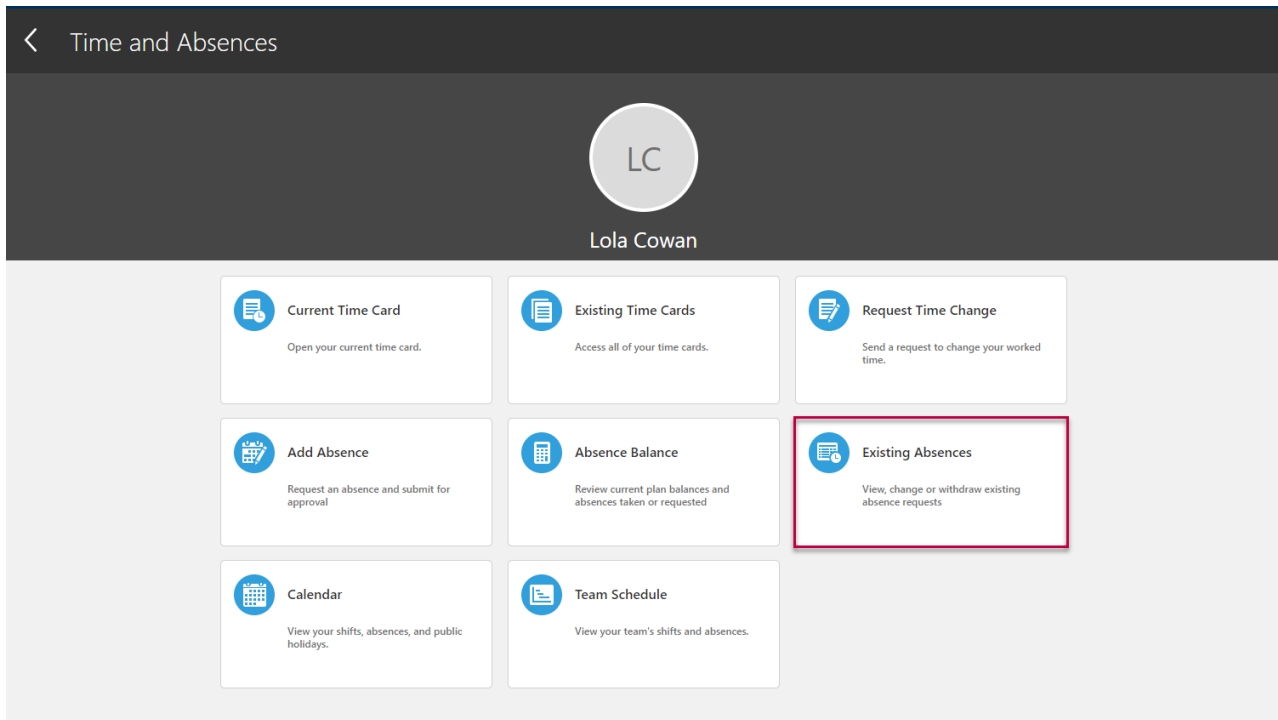
OK Cancel

d. Then click **OK**

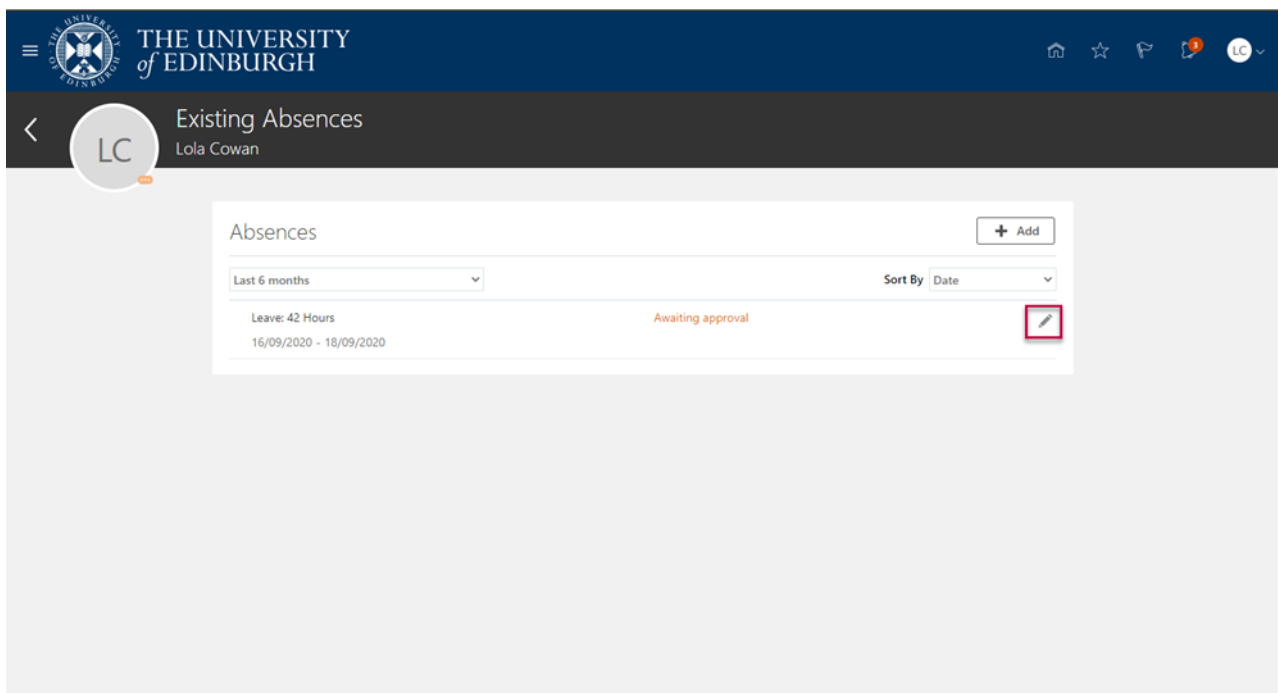
Note: If you hold multiple assignments and want to apply leave to all assignments, just enter the dates on the first screen without selecting Edit Entries.

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

The screenshot shows the 'Edit Absence' interface for user Lola Cowan. At the top, there's a navigation bar with the University of Edinburgh logo and user profile 'LC'. Below that, the form title is 'Edit Absence' with 'Delete', 'Submit', and 'Cancel' buttons. The main form area has sections for 'Type' (Leave), 'When' (with a red box around the 'Edit Entries' button), 'Start Date and Duration' (16/09/2020, 42 Hours), and 'End Date and Duration' (18/09/2020, 14 Hours). There are also 'Projected Balance' and 'Calculate' options, and sections for 'Details' and 'Comments and Attachments'.

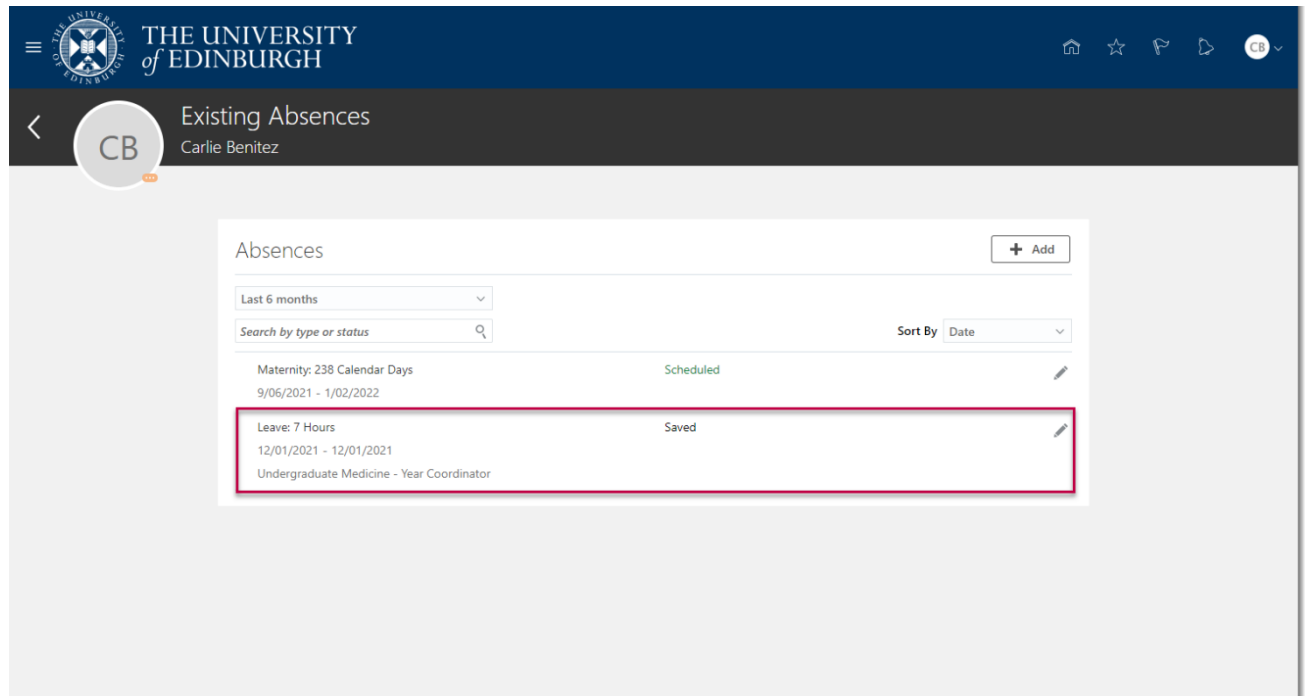
- d. Select **Delete** against each entry

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

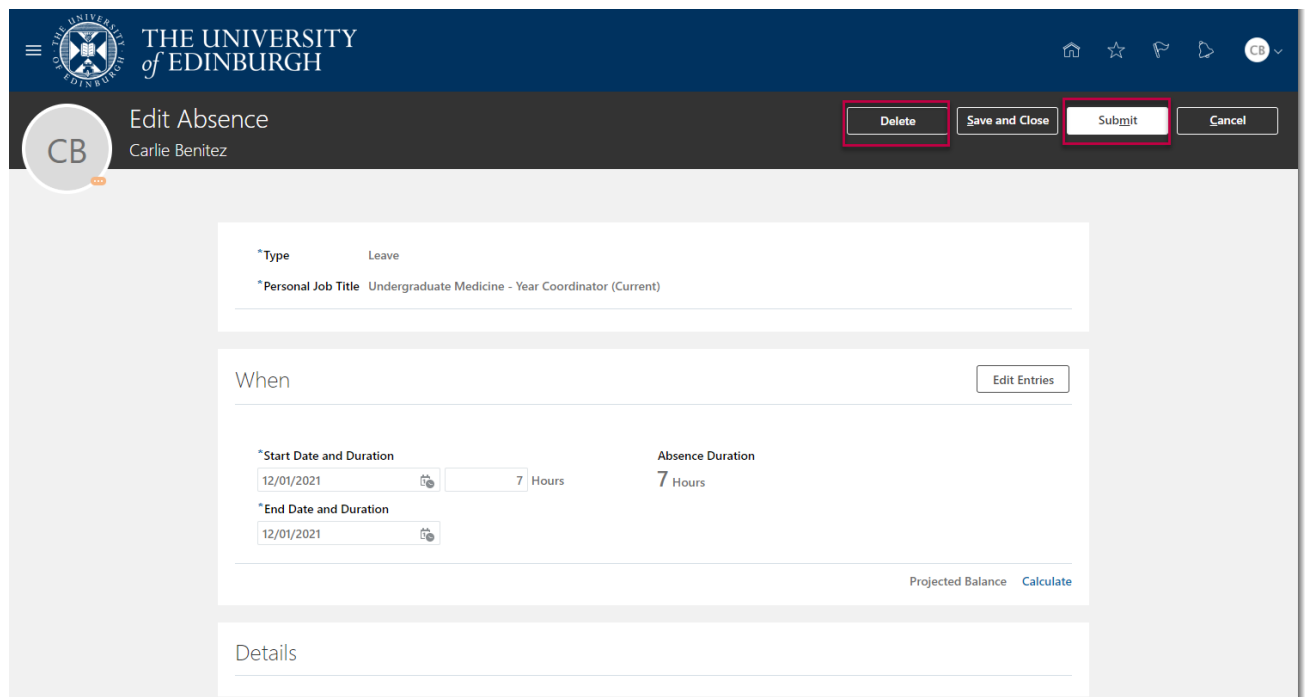
The screenshot shows the 'Add Absence' interface for user Annika Massey. At the top, there's a navigation bar with the University of Edinburgh logo and user profile 'AM'. Below that, the form title is 'Add Absence' with 'Save and Close', 'Submit', and 'Cancel' buttons. The main form area has sections for 'Type' (Leave), 'When' (with a red box around the 'Edit Entries' button), 'Start Date and Duration' (16/09/2020, 42 Hours), and 'End Date and Duration' (18/09/2020, 14 Hours). There are also 'Projected Balance' and 'Calculate' options, and sections for 'Details', 'Comments and Attachments' (highlighted with a red box), and 'Legislative Information'.

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 not submitted to your Line Manager but instead it will show in the **Existing Absences** page as **Saved**.



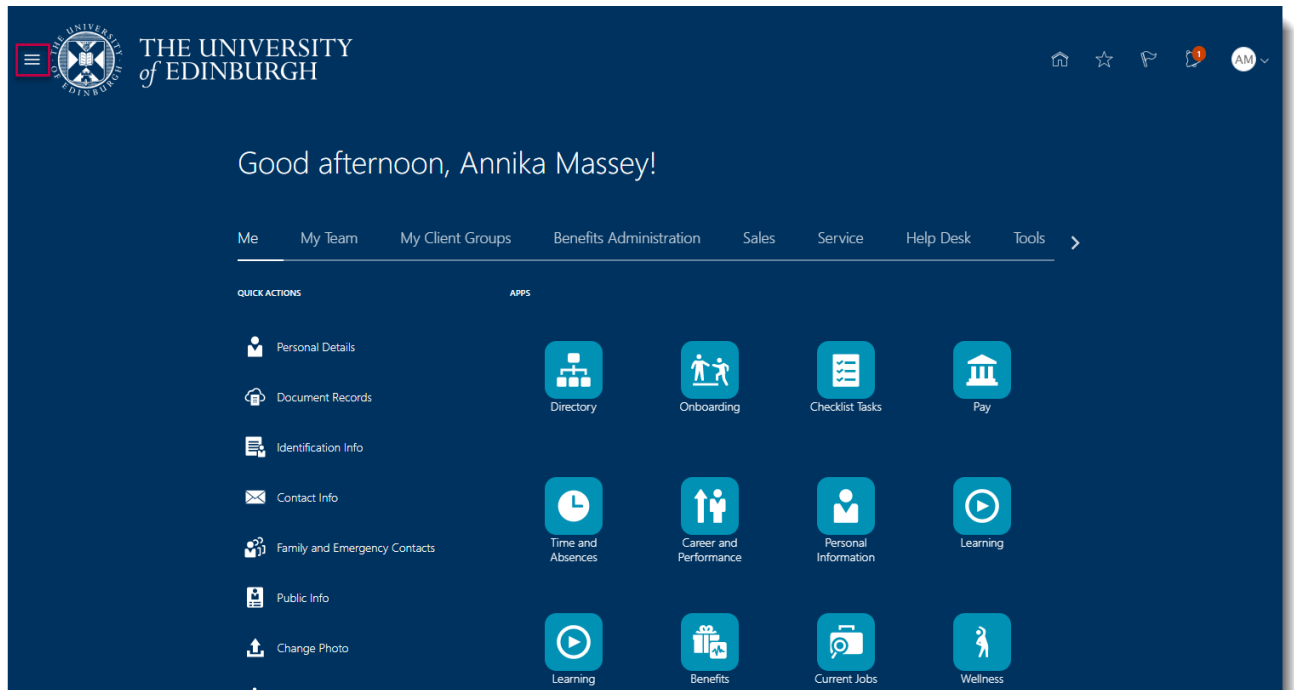
If you would like to complete the request simply click the pencil icon to the right of the saved request. You can then edit the absence, **Submit** will confirm the request with your Line Manager as normal or **Delete** will remove it completely.



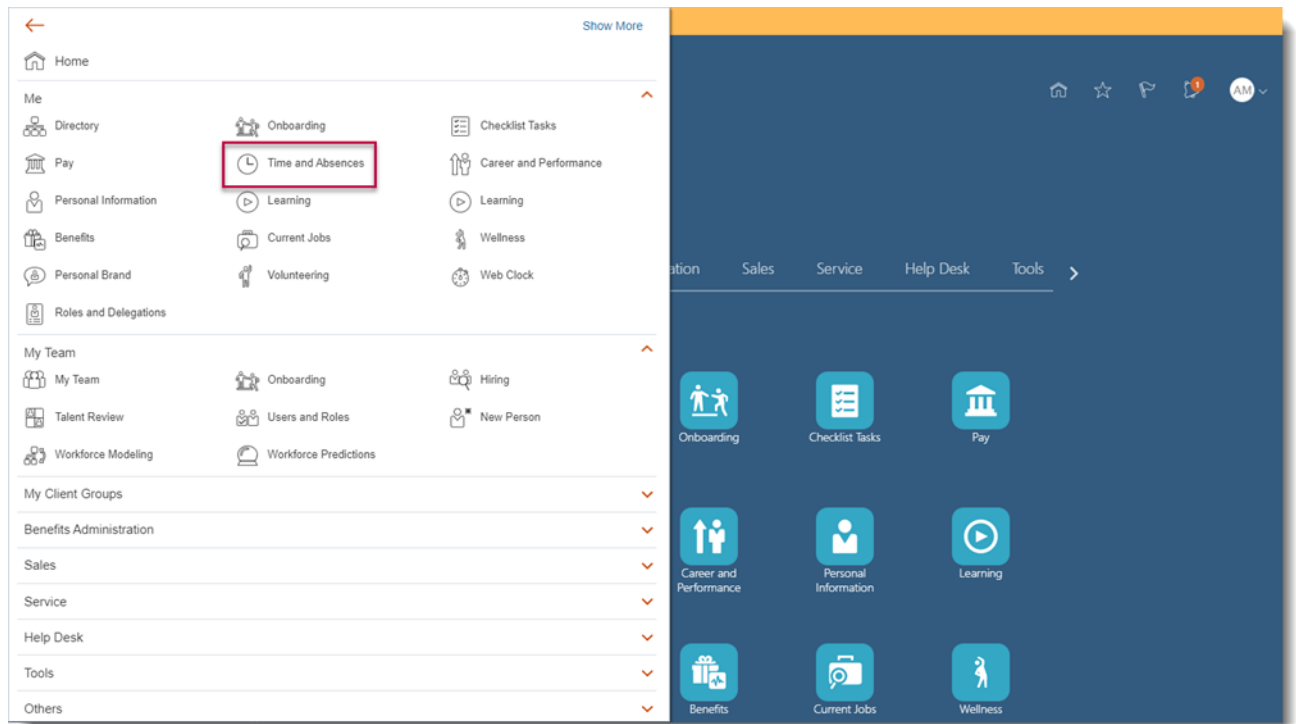


Amending annual leave:

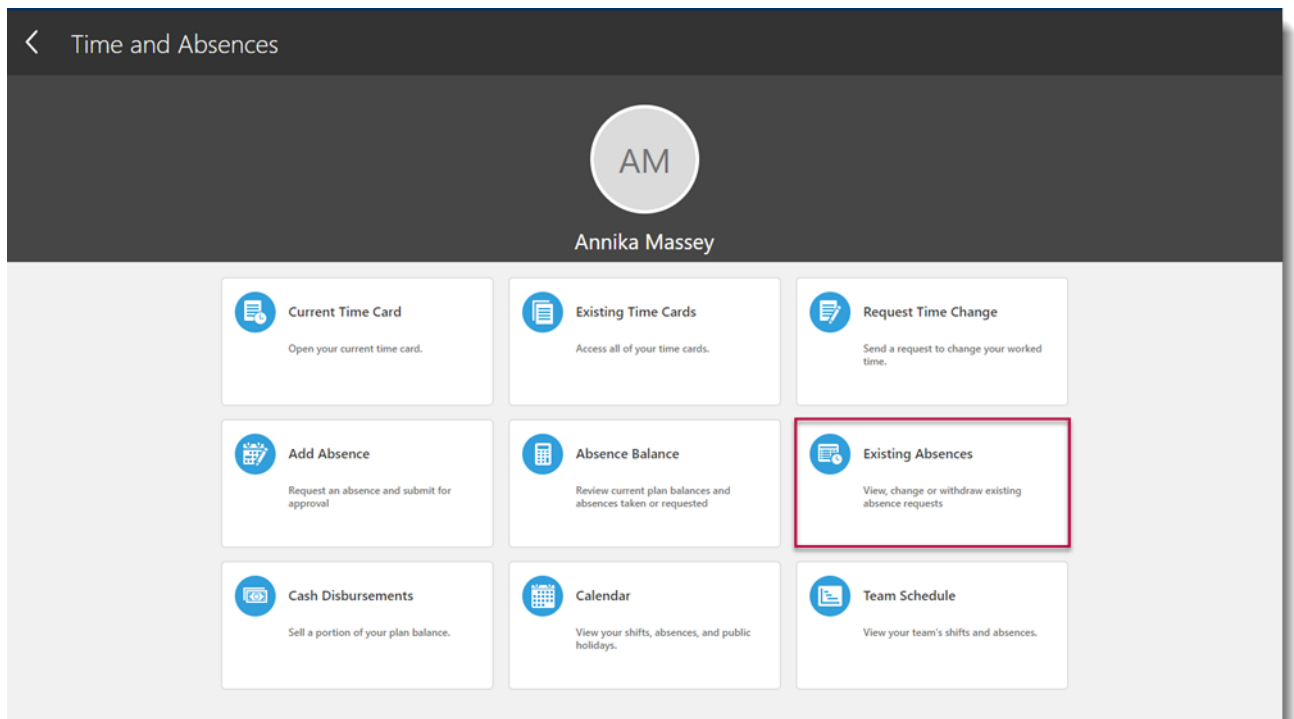
1. From the Home page, select the **Navigator** menu on the top left icon.



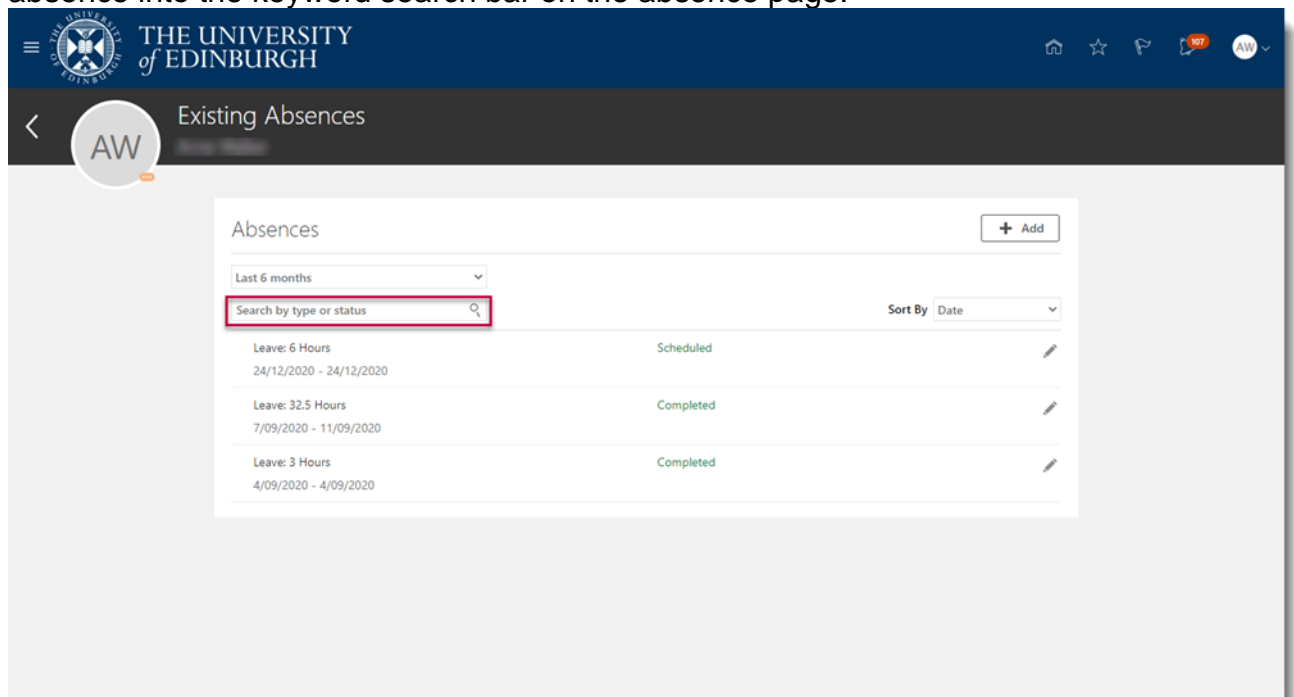
2. Open the **Me** section, then select **Time and Absences**



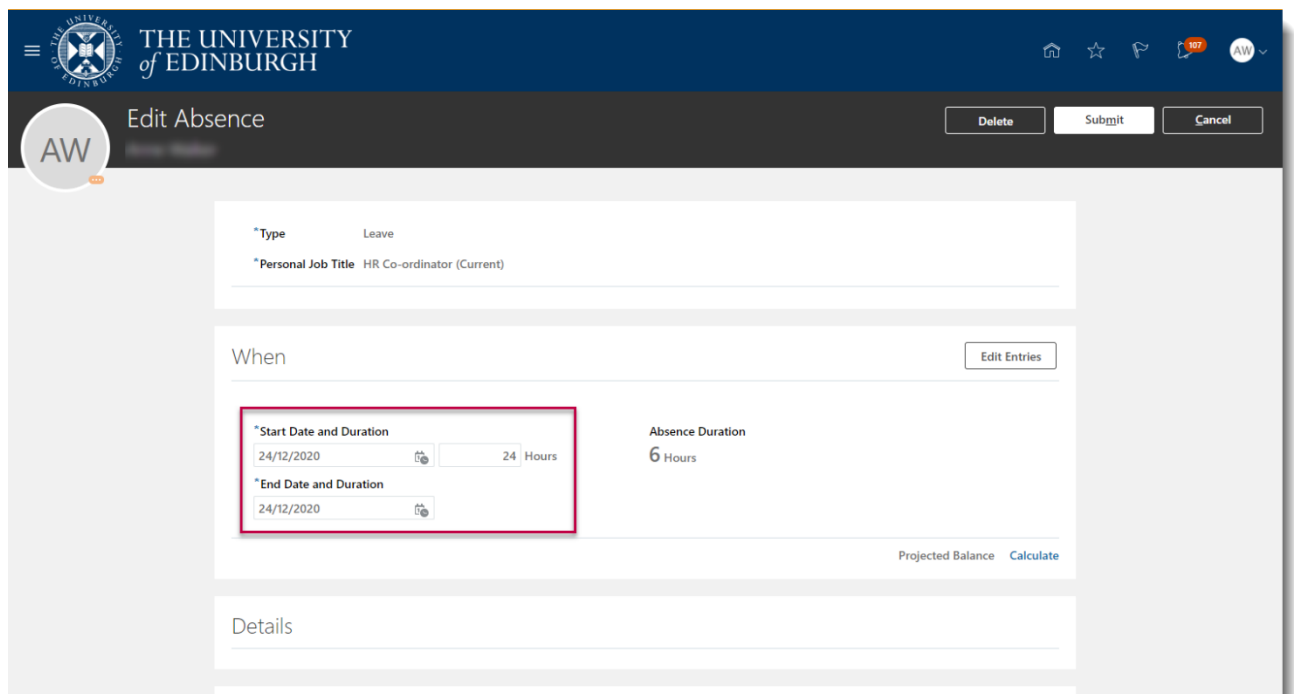
3. Select **Existing Absences** and click on the **Edit** icon next to the leave request you would like to amend



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.



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

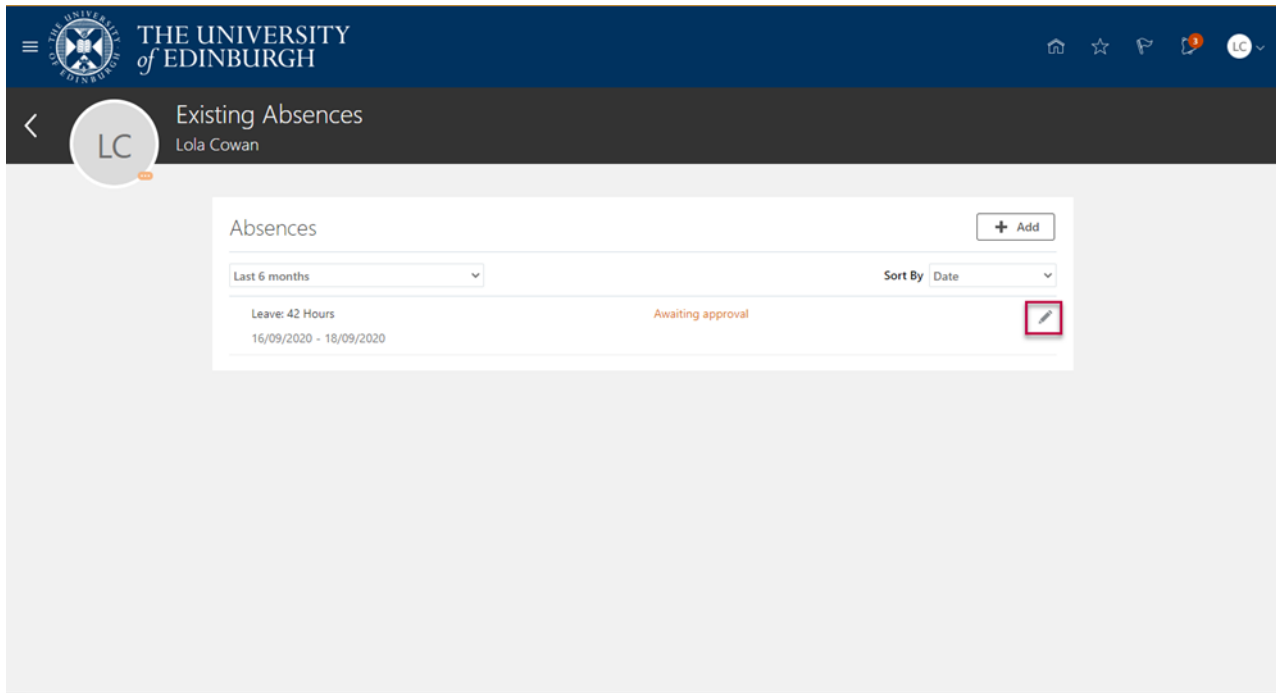
The screenshot shows the 'Edit Absence' interface for a user named AW. The header includes the University of Edinburgh logo and navigation icons. The main content area has a 'Delete' button highlighted with a red box. Below the header, there are fields for 'Type' (Leave) and 'Personal Job Title' (HR Co-ordinator (Current)). A 'When' section contains 'Start Date and Duration' (24/12/2020, 24 Hours) and 'Absence Duration' (6 Hours). There is also an 'End Date and Duration' field (24/12/2020). A 'Projected Balance' section with a 'Calculate' link is visible at the bottom right of the 'When' section. A 'Details' section is partially visible at the bottom.

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

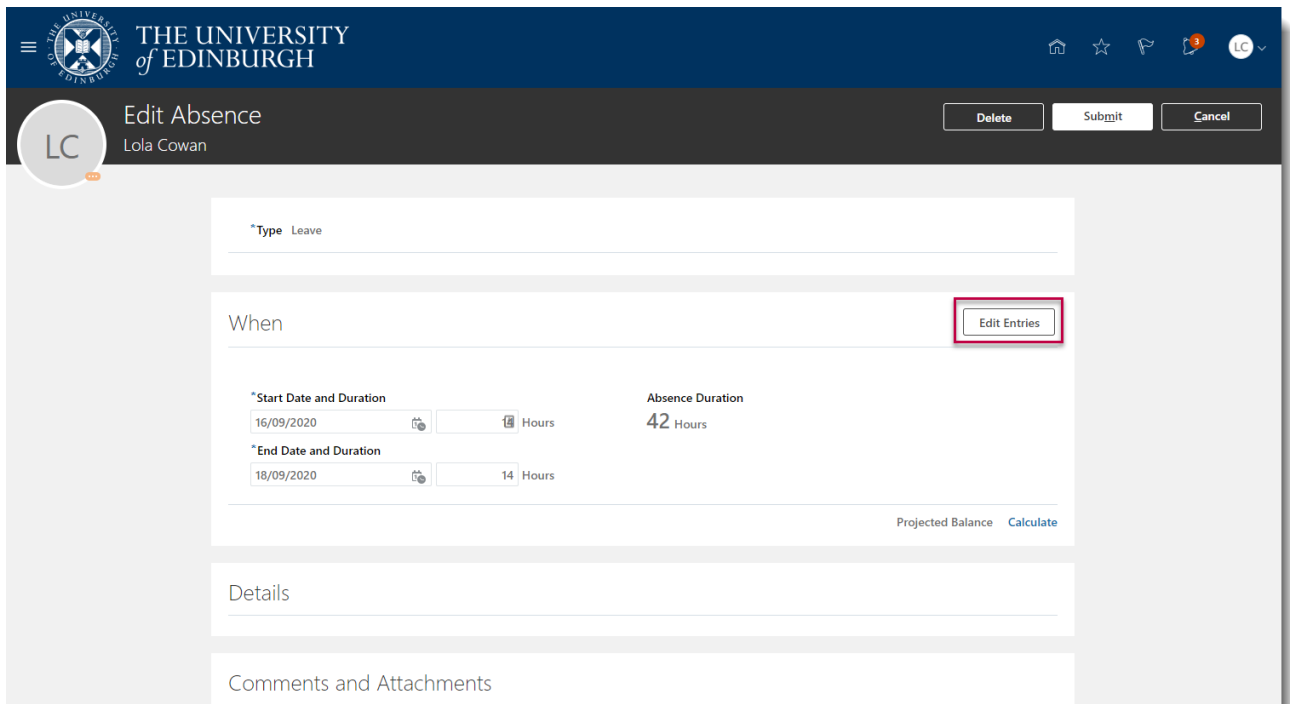
- a. Go to **Existing Absences**

The screenshot shows the 'Time and Absences' dashboard for user Lola Cowan. The dashboard has a header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'LC' and the name 'Lola Cowan'. The main area contains several tiles: 'Current Time Card', 'Existing Time Cards', 'Request Time Change', 'Add Absence', 'Absence Balance', 'Existing Absences', 'Calendar', and 'Team Schedule'. The 'Existing Absences' tile is highlighted with a red box.

- 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



LC Edit Absence Lola Cowan Delete Submit Cancel

*Type

When + Add

Duration in Hours	
16/09/2020 Clinical Tutor Associate (MBChB Programme)	7
16/09/2020 Administrator	7
17/09/2020 Clinical Tutor Associate (MBChB Programme)	7
17/09/2020 Administrator	7
18/09/2020 Clinical Tutor Associate (MBChB Programme)	7
18/09/2020 Administrator	7
Total Absence Duration	42

Projected Balance Calculate

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

LC Edit Absence Lola Cowan Delete Submit Cancel

When

Duration in Hours	
16/09/2020 Clinical Tutor Associate (MBChB Programme)	7
*Date: <input type="text" value="16/09/2020"/> Absence Duration: <input type="text" value="7"/> Hours Scheduled duration is 7 hours	
Assignment: <input type="text" value="Administrator"/>	
17/09/2020 Clinical Tutor Associate (MBChB Programme)	7
17/09/2020 Administrator	7
18/09/2020 Clinical Tutor Associate (MBChB Programme)	7
18/09/2020 Administrator	7
Total Absence Duration	42

Projected Balance Calculate

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

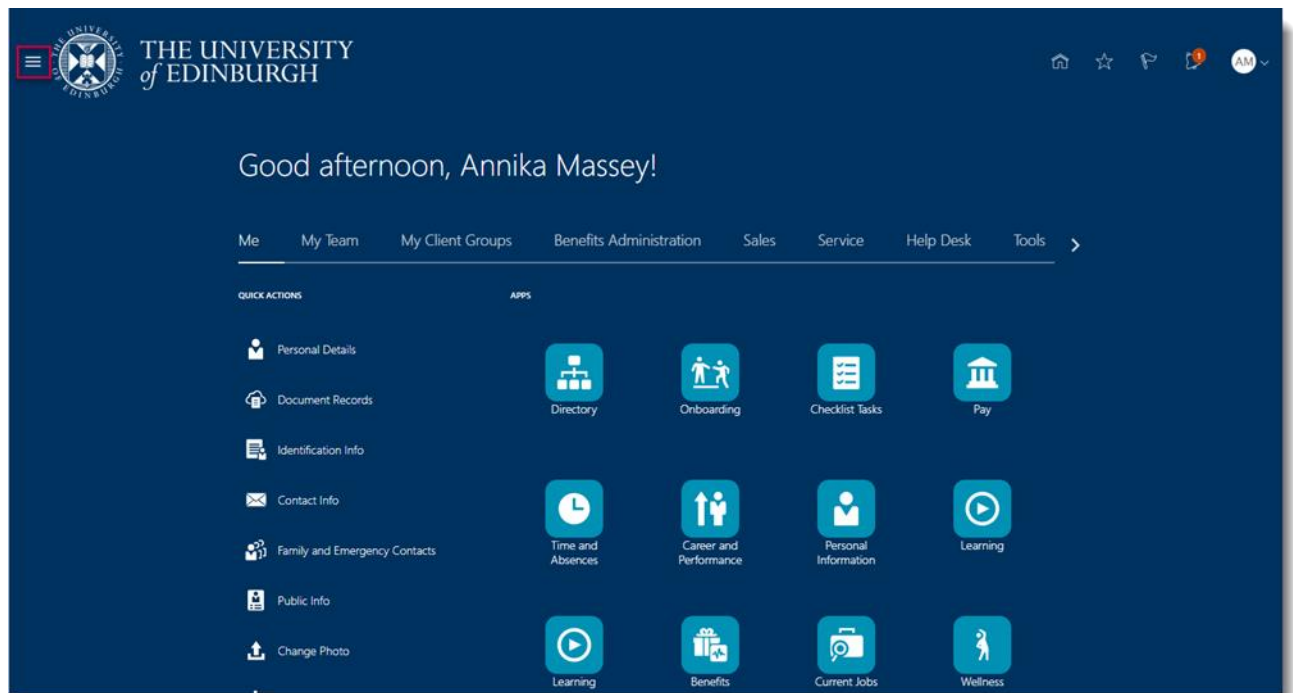
The screenshot shows the 'Add Absence' interface for Annika Massey. At the top, there is a header with the user's initials 'AM' and name. Below this, there are buttons for 'Save and Close', 'Submit', and 'Cancel'. The main content area is divided into sections: 'Details', 'Comments and Attachments', and 'Legislative Information'. The 'Comments and Attachments' section is highlighted with a red border. It contains a 'Comments' text area and an 'Attachments' area with a dashed border and a cloud icon, with the text 'Drag files here or click to add attachment'. At the bottom right of the main content area, there are links for 'Projected Balance' and 'Calculate'.

The screenshot shows the 'Edit Absence' interface for Lola Cowan. At the top, there is a header with the University of Edinburgh logo and name, and the user's initials 'LC' and name. Below this, there are buttons for 'Delete', 'Submit', and 'Cancel'. The main content area is divided into sections: 'Type Leave', 'When', and 'Details'. The 'When' section contains a table of absence dates and durations. At the bottom right of the main content area, there are links for 'Projected Balance' and 'Calculate'.

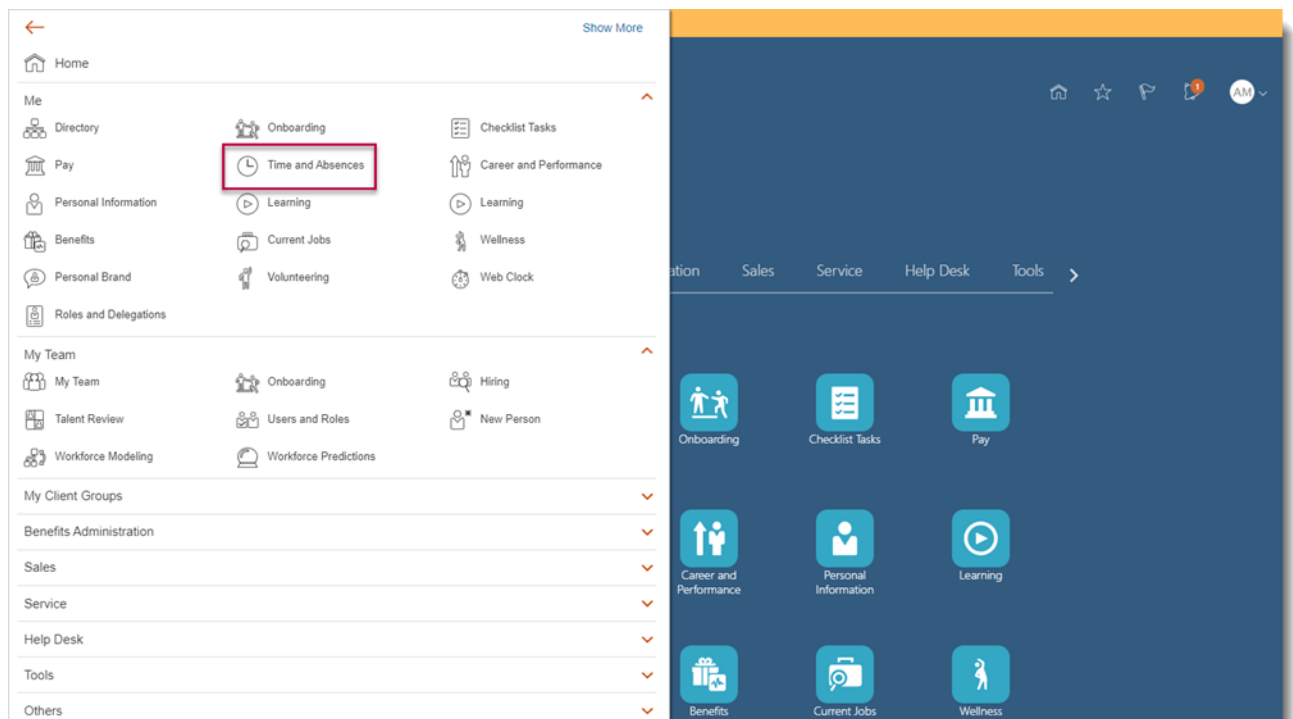
*Type Leave	
When + Add	
Duration in Hours	
16/09/2020 Clinical Tutor Associate (MBChB Programme)	7
17/09/2020 Clinical Tutor Associate (MBChB Programme)	7
18/09/2020 Clinical Tutor Associate (MBChB Programme)	7
Total Absence Duration	21

labelling="Section-Header">Cancelling annual leave:

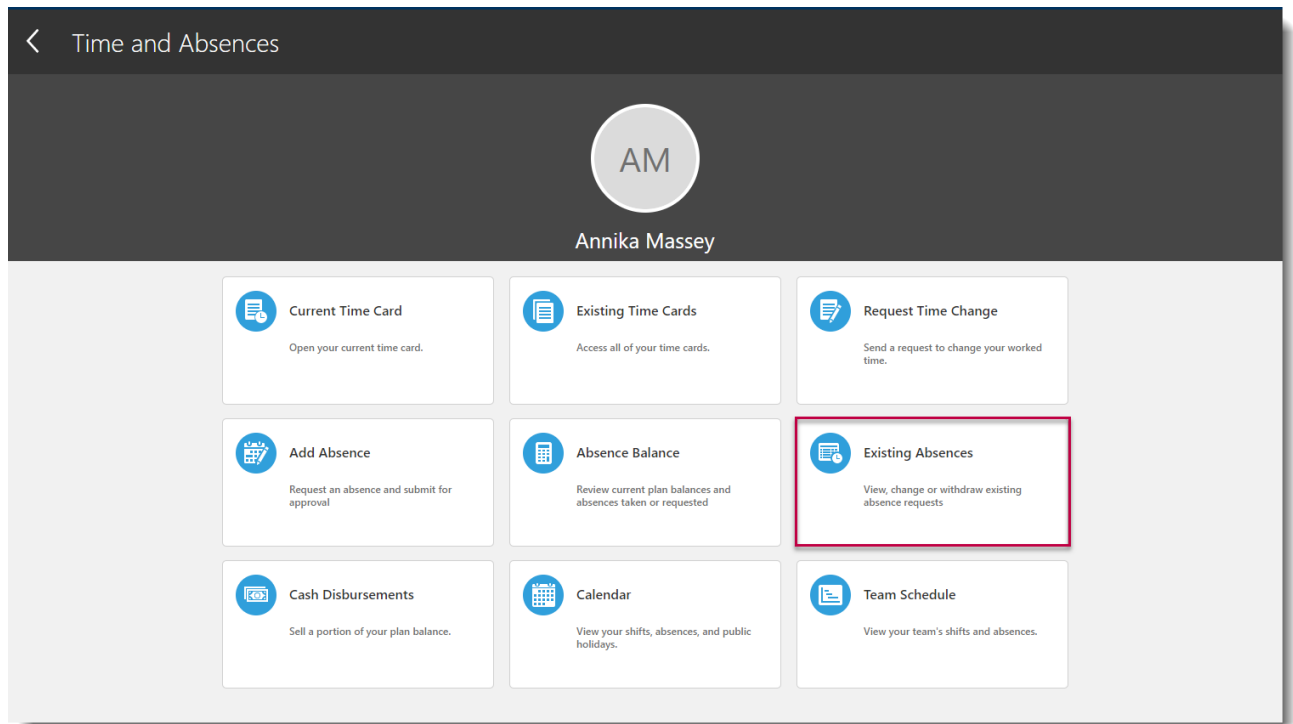
1. From the Home page, select the **Navigator** menu on the top left icon



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'.

