Welcome to the HR Self-Service User Guide for Leave Management.

This guide will provide information on managing your holiday and Time of in lieu (TOIL) in HR Self-Service. Access is currently dependent on where you work, if you are unsure of the arrangements in your area please check with your manager.

The sections covered within the guide cover the key features as follows:

- Self-Service Dashboard
- My Balance
- Calendar
- History
- Requesting leave
- Frequently asked questions
- Need further assistance?

Self-Service Dashboard

These are the menu items that are available to you on your dashboard when you login to self-service and click on My Holiday and Time Back in the task pane:

Access is dependent on your department, but once granted you can add the Holiday and Time Back widget via the ‘Edit Dashboard’ button.

From the widget you can:
- View your entitlement.
- See how much leave you’ve taken.
- Request leave.
- View your TOIL (TTB) balance

All images are taken from a TEST environment and therefore may differ slightly to your screen

If the widget is not available to add to your dashboard speak to your Manager to confirm that you are using self-service to record leave and if necessary request access from hrsystems@st-andrews.ac.uk
My Balance

To access your balance, select “Annual Leave” from the dropdown and the screen below will open:

Your entitlement is calculated automatically and is dependent on your start date or the leave entitlement year, your grade, and years of service together with your contracted hours.

Calendar

Within the calendar you can view your leave booking history in calendar view in addition you can book, edit, delete requests, and record your extra hours worked for TOIL.

Before submitting a new request, you can check who else has booked time off by clicking the “View Team Calendar” button.
To view the details of a specific absence find the record you want to check and click on the chevron and the additional details will be displayed.

There are a number of different statuses that apply to leave requests, these are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>A completed absence which is pending approval</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>An absence request which is no longer valid. Credits the hours back to your overall entitlement</td>
</tr>
<tr>
<td>Rejected</td>
<td>A request which has been rejected by the approver, and the hours are not deducted</td>
</tr>
<tr>
<td>Approved</td>
<td>Has been approved and once the date has passed the hours</td>
</tr>
</tbody>
</table>
Requesting Leave

There are two different types of leave which can be submitted via self-service, these are:

- Annual leave
- Time of in Lieu (TOIL)

TOIL is limited to specific roles and departments, and as it is not included by default in the widget will not be covered in depth in this guide. If you are unsure as to whether you qualify for TOIL speak to your manager.

You can access the leave request form in different ways, you can:

- Click the “Request” button on the dashboard widget; or
- Click “Request New” in the Calendar

And the request form will open, which includes links to the policy as well as some helpful guidance notes.

If you hold multiple posts, make sure you select the relevant post from the dropdown list either on the widget or on the home page menu prior to completing your request. These must be current as you are not able to book leave against future posts.
Frequently Asked Questions (FAQs)

I need to book annual leave (AL) but how can I do that in self-service?

The self-service user guide provides full details on how you book leave in self-service. User guides are available on the self-service login page and within self-service itself, simply go to the task pane on the left and open the “User Guide” section and click on Annual Leave for Users.

My annual leave balance looks wrong – what do I need to do?

Check the Annual Leave policy and guidance on the intranet for information on how to calculate your annual leave. If having done this your balance still looks incorrect, please email hrdata@st-andrews.ac.uk providing full details of your query.

I need to book leave for next year, but am getting an error message – why?

If you are moving into a new post in the near future and are trying to book leave after the start date you will not be able to do so, in this case you will need to get agreement from your new manager for the dates you wish to book and then record them in the system once you have taken up your new position.

How can I change a leave booking which has already been approved?

You can amend or delete a leave booking at any time both before and after the leave date. Guidance on how to do so are in the user guide in the “Calendar” section.

I am trying to submit annual leave and time off in lieu (TOIL) on the same day – why do I keep getting an error message?

You can book both leave and TOIL on the same day up to a combined total of 7hrs 25 mins which is the default working pattern. If your working day is more than that you will need to either book a full day of either TOIL or AL.

I’ve recently changed jobs and am unable to book leave but get the error message ‘Unable to create absence due to earlier unprocessed absence’ when I try - what do I need to do?

This can happen if you have booked leave after your new post has been processed. Email hrsystems@st-andrews.ac.uk who will be able to resolve this on your behalf.

My manager hasn’t received my request for leave to approve – where has it gone?

Guidance on how to check where your request has been sent are in the “History” section of the user guide, once checked you can then follow up as required.

Need further assistance?

- Annual Leave Policy and Guidance
- Self-service queries - hrsystems@st-andrews.ac.uk
- Entitlement and balance questions – hrdata@st-andrews.ac.uk

We are also always interested to hear your comments. Use the HR Services feedback form to tell us about your experience on the HR Self Service or any of the HR systems.