HR Organiser

Absence User Guide

BUSINESS SYSTEMS TEAM

Click HERE to log in

Contact us:
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http://www.essex.ac.uk/staff/hr_organiser/
Introduction

This user guide has been designed to help you view and manage your absence using HR Organiser. It will show you how to:

- View the various new screens in HR Organiser
- Explain the conversion of annual leave from days to hours
- Explain your annual leave entitlement
- Book, amend and cancel annual leave
- View your own and your peer’s absence calendars
- View your sickness absence details
- FAQ’s

Logging on to HR Organiser

You can log in to HR Organiser here: https://hrorganiser.essex.ac.uk

You will need your University username (without the @essex.ac.uk) and your University password. This is the same password you use to log on to the network and your emails.

Having trouble logging in? Your password must not contain any of the following characters " £ ¬ | \ if it does you will need to reset it which can be done here: https://www.essex.ac.uk/password/login.aspx

If you are still having problems please contact the IT helpdesk.

Please note you can only log in to HR Organiser whilst you have a current contract with the University. If you have left and your contract has ended you will no longer be able to gain access to the system.
Absence homepage

Once you have logged in to HR Organiser you can either follow the quick links at the bottom of the page or select the Absence tab at the top of the page.

You will then be presented with the below screen. This is your main Absence page.

Your balance of annual leave left to take
Your annual leave entitlements for the current and future years
Your absence calendar
Book new annual leave

Your sickness dates. Click on the small notepad in the top right corner to view more details.

Holiday start and end dates, duration in hours, type of holiday taken and your job position at the time of the holiday. A twelve month rolling year is displayed.

Search for specific holiday dates beyond what is displayed.

Current status of your holiday.
Authorised: your manager has approved it
Refused: your manager has denied it
Awaiting authorisation: your manager is yet to action it
Not applicable: it has been entered by the Systems Team to get your record up to date before the rollout to your section.
Conversion from days to hours

The University has decided that all annual leave will now be calculated in hours instead of days. This will allow managers to process leave requests across our working spectrum consistently for all staff.

Below is a conversion chart of days to hours for a standard working pattern of a full time member of staff. This covers both grades 1-6 and 7-11. If you are on any other working pattern the system will automatically take off one day based on your individual hours for that day. Your entitlement will be pro rata to a full time member of staff.

<table>
<thead>
<tr>
<th>Days/Weeks</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half day</td>
<td>3.6 hours</td>
</tr>
<tr>
<td>One day</td>
<td>7.2 hours</td>
</tr>
<tr>
<td>Two days</td>
<td>14.4 hours</td>
</tr>
<tr>
<td>Three days</td>
<td>21.6 hours</td>
</tr>
<tr>
<td>Four days</td>
<td>28.8 hours</td>
</tr>
<tr>
<td>Five days (1 week)</td>
<td>36 hours</td>
</tr>
<tr>
<td>Ten days (2 weeks)</td>
<td>72 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement Grade 1-6 (23 days)</td>
<td>165.6 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 5 years’ service (24 days)</td>
<td>172.8 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 7 years’ service (25 days)</td>
<td>180.0 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 12 years’ service (26 days)</td>
<td>187.2 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement Grade 7-11 (28 days)</td>
<td>201.6 hours</td>
</tr>
</tbody>
</table>

Working Patterns

A working pattern is a representation of a member of staffs' working week, the days of the week an individual works, and the hours they work on each of those days. Working patterns can also accommodate rotational patterns, shift and compressed hours etc.

For full time employees the default working pattern is applied automatically, unless they are expected to work on a Saturday or Sunday on a regular ongoing basis. This is 36 hours per week, 7.2 hours (7 hours 12 minutes) per day Monday to Friday.

Aside from the default working pattern, it is possible to accommodate many other working patterns within the system as agreed by HR.

Why are work patterns important?
Accurate working patterns are a very important part of the Absence Management Module. Every time any absence is recorded in the system it will check your current working pattern to see how many hours you were due to work on that day. In the case of annual leave this number of hours will be deducted from your annual leave entitlement. If an incorrect pattern or no pattern is held within the system it will be unable to calculate your entitlements correctly.

How do I check my working pattern?
Select the Employment tab in HR Organiser. Click on your position. Your job details will be displayed. Your Work Pattern displays on the right hand side of the page. If your work pattern is incorrect it is crucial that you speak to your line manager and contact HR as all absences are driven by this pattern.
Your Annual Leave Entitlement

Your annual leave entitlement will be made up of both your annual leave and your bank holiday entitlement for the year. When you click on Holiday Balances you can see your annual leave for the year and how it is broken down.

**Entitlement:** the full entitlement annual leave + bank holidays + annual leave carryover for the year

**Taken:** the annual leave and bank holiday hrs that you have already taken to date through the leave year

**Scheduled:** the annual leave you have booked for the future and the bank holidays that are yet to pass in the leave year. As soon as these dates have occurred the hours will move in to the taken column.

**Balance:** this is the remaining annual leave that you have left to book. This is the column you will need to check so you can see what you have left. This does not contain any of the bank holidays as they will either appear in the scheduled or taken columns.

When you request an annual leave date it will automatically go in to the scheduled column and your balance will reduce by the relevant hours. If the annual leave is approved by your manager there will be no change. If the annual leave is refused then the hours will be credited back in to your balance.

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**Bank Holidays/Closure Days**

You do not need to book bank holidays or closure days as the system automatically calculates these. They will show in either your scheduled column for those yet to occur or your taken column for those already passed.

If a bank holiday falls during a period you wish to take as annual leave then you need to book your annual leave dates around it remembering not to include it. For example if you wish to take two weeks annual leave between 18\textsuperscript{th} – 29\textsuperscript{th} August but bank holiday Monday falls on the 25\textsuperscript{th} you will need to make two separate bookings.

WEEK 1 – Monday 18\textsuperscript{th} August – Friday 22\textsuperscript{nd} August
WEEK 2 – Tuesday 26\textsuperscript{th} August – Friday 29\textsuperscript{th} August

**Carryover**

It should be noted that unused holiday entitlement cannot normally be carried over from one leave year to the next. Any alternative arrangements should be discussed and authorised by your line manager. You should never carry over more than 5 days. If you have carryover your manager will be able to input it in the system. Your carryover will be included in the total entitlement for the year and will then be available to book as annual leave.

**Long Service**

If you are entitled to long service (5yr, 7yr and 12yr) the system will automatically recognise this and include the relevant additional annual leave into your entitlement at the beginning of the leave year.
Booking Annual Leave

To book annual leave click on the **Add Holiday** button. You will then be taken to the **Holiday Details** screen.

**Absence type:** Personal Holiday

**Holiday period:** Part Day, Full Day or More than one Day

*Tip: Enter part day if you are only taking the morning or afternoon off or you want to enter specific hours you are going to be absent.*

**Full Day:** this deducts one full days allowance off your balance. If you are full time on a standard working pattern this will be 7.2 hours. If you are part time or work a different working pattern this will be whatever your individual hours are for that day. For example if you work 6 hours on a Monday but only 4 hours on a Friday the system will deduct the correct number of hours depending on what day you have booked off. It is important that you check your working pattern is correct as this is what the system refers to.

**Part Day:** once you select part day you can go to the drop down that says **Morning** or **Afternoon** and here you have the options for morning, afternoon or specify time. If you select either morning or afternoon half of a normal days hours will be deducted from your balance. If you select specify time you can enter the exact hours you wish to take as annual leave. Make sure you enter a colon (:): between the numbers in the start, end and hours absent boxes and not a full stop.

**More than one day:** here you can choose to book more than one day's annual leave. It can start in the afternoon or at a specified time and can then continue to the required end date and time. Remember to enter a colon (:) between the numbers if you are entering a specific time and not a full stop.

Examples:

**Specific times**

<table>
<thead>
<tr>
<th>Start time</th>
<th>Hours absent</th>
<th>End time</th>
</tr>
</thead>
<tbody>
<tr>
<td>15:00</td>
<td>2:00</td>
<td>17:00</td>
</tr>
</tbody>
</table>

**More than one day’s leave**

<table>
<thead>
<tr>
<th>Start date</th>
<th>End date</th>
</tr>
</thead>
<tbody>
<tr>
<td>13/01/2015</td>
<td>14/01/2015</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Absence type</th>
<th>Holiday period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Holiday</td>
<td>More than one day</td>
</tr>
</tbody>
</table>

**Holiday Details**

- **Absence type:** Personal Holiday
- **Holiday period:** More than one day
- **Start date:** 13/01/2015
- **End date:** 14/01/2015
Cancelling/Amending Annual Leave from the past

If you are required to cancel/amend an annual leave entry that is in the past you should highlight this to your manager who will be able to access your record via People Manager and make the necessary adjustments.

Cancelling Annual Leave booked for the future

If you need to cancel annual leave that is yet to occur you can do so by selecting the Absence tab and in the list of annual leave dates click on the one you wish to cancel. The holiday details will be displayed. Select Delete to send a cancellation notification to your line manager. Those hours will then be credited back to your entitlement. If you cancel annual leave you will need to remember to delete the Outlook event in your Outlook calendar.

Note: selecting cancel only closes the window; you need to select Delete to cancel your annual leave
Amending Annual Leave booked for the future

If you need to amend an annual leave date that is yet to occur you can do so, but only once it has been authorised by your line manager. Managers should action all annual leave requests within 48hrs where possible.

In the annual leave dates list select the annual leave that you wish to amend. Once the Holiday Details are displayed you can amend the details accordingly. Once you are happy with your changes click Save. These changes will be sent to your manager to approve.

What if my manager hasn’t authorised my annual leave yet but I need to change the dates? If your request is yet to be approved by your manager and you need to change the details you can delete your original request (please see the previous section) and you can rebook with the correct details. Remember to delete your Outlook diary event as this is not done automatically.
When you click on the My Calendar tab of the Absence homepage you will be presented with the below screen. By expanding the Calendar colour options you can see what the different colours represent. The calendar gives you an overview by day, week or month. In the drop down menu you can choose to view just your own calendar or your peer group calendar. The peer group calendar will show the absence details of those in your team so you can easily see who has already booked leave. You can click on an individual day for more details.

**Calendar drop down. Choose between: My Calendar and Peer Group calendar**

Choose your view

List of the different absences for that day. Click for day view details. The top details will be your own. If you have several members in your team the details will be condensed e.g. 4 – Working day means four people have a normal working day. Click for individual details.

Book new annual leave

Close the screen
Weekly view – Peer Group

Day view – Peer Group
Sickness Details

On your Absence homepage you can view your sickness details. Just the dates of sickness absence are displayed but if you click on the box you will be able to view the full details of the sickness absence.

If your sickness details are incorrect you should contact HR (staffing@essex.ac.uk).
FAQ’s

Logging In

When I try to log in to HR Organiser it says my log in details are incorrect? Make sure you have entered your username **without** the @essex.ac.uk. Your password is your University password, has this recently changed? Your password must not contain any of the following characters as these are unsupported by the system " £ ¬ ¦ | \.

Do you have a current contract with the University? Once you have left the University you will no longer have access to HR Organiser.

Absence

I work different hours on different days how to I take leave? As long as your working pattern is correct the system will deduct the number of hours you should have worked on a particular day. For example if you work 7 hours Mon – Thurs and 5 hours on a Friday and you want to book a whole week off you do not need to do this separately. Just book one week of leave and 33 hours will be deducted. The duration of hours is displayed on your Absence homepage so you can easily check the right number of hours have been deducted.

Do I have to book the bank holidays? No. The system automatically calculates and deducts the bank holidays for you. If you are booking annual leave remember to book around them.

I want to book annual leave for next year, what do I do? You can book this annual leave now. It will automatically come out of next year’s entitlement and not this year. Remember your homepage displays a rolling 12 month year and not just the current annual leave year so you may see dates that are from the previous or next leave year. This does not mean they have been taken for this year’s entitlement.

My annual leave requests are going to the wrong manager? You may have the wrong manager recorded against you in the system. Your manager will need to notify HR so this can be corrected.

What happens if my manager is out of the office, who will approve my annual leave? Managers have the option to redirect their tasks to another manager whilst they are out of the office. If for any reason they have not activated this and they are absent you can contact your Leave Administrator who will be able to redirect the task to an appropriate delegate.

I booked annual leave but I was off sick. How do I get my annual leave back? Upon your return to work you should liaise with your manager. They will be able to able to delete any annual leave that you did not take and credit it back in to your entitlement.

I have two different jobs, how do I book annual leave? If both your departments have rolled out with annual leave online booking then you can book all your annual leave online. When you add a new holiday date you have the option to select which job you want to take it for. You also have the option of all jobs. As long as your working patterns for each of the jobs are correct then the right number of hours will be deducted from the right job accordingly.

My working pattern is wrong, what do I do? You need to contact HR immediately so it can be corrected.

How do I get my long service? If you are grades 1-6 your long service will automatically be calculated in your entitlement at the beginning of the annual leave year that you are due to hit your 5, 7 or 12 year anniversary.
Who do I notify about my carryover? It should be noted that unused holiday entitlement cannot normally be carried over from one leave year to the next. Any alternative arrangements should be discussed with your manager. Carryover should never be more than 5 days. If authorised, your manager or leave administrator will be able to add carryover to your entitlement.

I don’t understand how my annual leave has been calculated? If you are full time your annual leave entitlement will be the number of days leave you are eligible for plus the number of bank holidays/closure days for that year multiplied by 7.2 hours per day. The number of bank holidays/closure days will vary each year due to when Easter falls. You can check the dates here: http://www.essex.ac.uk/hr/policies/university-closures.aspx

Remember although the entitlement is calculated using a full time standard working pattern of 7.2 hours per day you will only be deducted hours according to your working pattern. If you work compressed full time hours you will be deducted one days annual leave accordingly.

If you work part time hours your annual leave will be calculated pro rata based on a full time member of staffs leave. Don’t forget you can use the online bank holiday calculator to work out your bank holiday entitlement. http://www.essex.ac.uk/hr/current-staff/part-time-leave-calculator.aspx

Here are some examples of annual leave calculations:

- **Full time member of staff grade 1-6 (2014/15 leave year)**

  23 days holiday + 12 days bank holiday/closure day = 35 days
  
  35 * 7.2 = 252 hours (of which 165.6 is annual leave and 86.4 are scheduled bank holiday/closure days)

- **Full time member of staff grade 7-11 with 2 days carryover (2015/16 leave year)**

  28 days holiday + 13 days bank holiday/closure day + 2 days carryover = 43 days
  
  43 * 7.2 = 309.6 hours (of which 201.6 is annual leave, 93.6 are bank holiday/closure days and 14.4 is carryover)

- **Part time member of staff grade 1-6 working 20 hours per week (2014/15 leave year)**

  23 days holiday + 12 days bank holiday/closure day = 35 days
  
  35 * 7.2 = 252 hours
  
  252/36hrs (full time hours) = 7
  
  7 * 20hrs (member of staff’s full week) = 140 hours (of which 92 hours are annual leave and 48 hours are bank holiday/closure days)

  This is working on the assumption that the member of staff does the equal number of hours each day. If this varies then you can use the bank holiday calculator to work out what bank holiday hours you are entitled to.

  If it works out that you are entitled to more bank holiday hours than you would have worked then these will be incorporated into your annual leave for you to off.

  If it turns out that you would have worked more hours than you are entitled to for bank holiday/closure days then these extra hours will be deducted from your annual leave so you are not able to take them twice.