

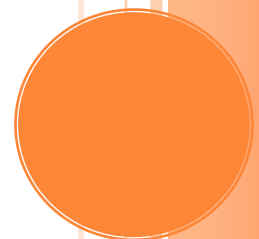
# *Annual Leave Management Excel Template User Guide*

## *Excel-based Annual Leave Management Template*

This Excel-based template allows users to manage annual leave for employees. In addition to standard leave category up to 9 other absence categories, such as compassionate leave, sick leave, and study leave can be monitored. The accrual of annual leave entitlement on a monthly basis is calculated. The system can be set up for any starting month or year. Detailed schedules are calculated for each employee and monthly summary and annual summary reports are also produced. In the current version all Leave can be recorded as full day or half days. The standard template can be used up to 50 employees and can be filtered by department. The template can easily be customized for a larger number of employees. Each monthly schedule and reports can be printed to fit on a single letter or A4 page in landscape layout. The template can be easily updated for future years. The template is totally customizable, uses only standard Excel features for Excel 2007 or later versions and contains no macros.

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# ANNUAL LEAVE MANAGEMENT EXCEL TEMPLATE USER GUIDE

## *Excel-based Annual Leave Management Template*

### INTRODUCTION

This Excel-based template provides a detailed leave management schedule template for each month of year. A monthly and annual summary report is also produced. The template uses any month of the year as a starting position and is automatically updated for future years. The Excel template is totally customizable, uses only standard Excel features and contains no macros. The typical monthly calendar is depicted in Figure 1 below. The Annual Summary Report is depicted in figure 2 below.

**January 2014**

		Full Day	Annual Leave	AL	Compassionate Leave	CL	Time in Lieu	TL
		Half Day		AL2		CL2		TL2
		Sun	Mon	Tues	Wed	Thur	Fri	Sat
Employee	Department	1	2	3	4	5	6	7
Joe Blog	Accounts		AL2	CL	TL	AL	TL2	

**Figure 1 Monthly Schedule Excel Template**

		Summary for 2013							
Employee	Department	Annual Leave	Entitlement	Balance	Compassionate Leave	Time in Lieu	Sick Leave	Exam/Study Leave	Unpaid Leave
Joe Blog	Accounts	17	20	3	0	0	5	10	0
Jim Bigg	Manufacturing	28	20	8	11	0	22	0	5
Jill Jones	Sales	24	20	4	13	2	8	0	0
John Doe	IT	22	20	2	0	0	0	0	0
Jim Joy	Admin	23	20	3	0	0	0	0	1
John Small	Manufacturing	11	20	9	11	12	2	0	0
Jane Doe	Shipping	1	20	19	0	0	0	10	0
Big Guy	Admin	11	25	14	0	0	0	0	0
Jim Fixit	IT	22	20	2	0	3	0	5	3
		0	0	0	0	0	0	0	0
		0	0	0	0	0	0	0	0

**Figure 2 Annual Summary Report**

## USER INSTRUCTIONS

### Setup

The template Setup tab is used to identify the Start Month and the Year. The Start Month is defined as a numeric value in the range of 1 to 12 (1= Jan, 2 = Feb, etc.) and the year is entered as a four digit numeric value, 2013, 2014, etc. Both values can be changed at any time as per figure 3 below. Leave type descriptions and abbreviation codes are also edited via the Setup.

1	<b><u>Start Month (1 to 12)</u></b>	1
2	<b><u>Calendar Year</u></b>	2014
3	<b><u>Leave Description</u></b>	<b><u>Abbreviation/Color</u></b>
	Annual Leave	AL
	Compassionate Leave	CL
	Time in Lieu	TL
	Sick Leave	SL
	Exam/Study Leave	ESL
	Unpaid Leave	UL
	Public Holiday	PH
	Leave 8	L8
	Leave 9	L9
	Leave 10	L10

Figure 3 Setup Parameters

### CHANGE THE START MONTH

The Setup worksheet, as depicted in figure 3 above, allows the Start Month to be changed by editing the entry in cell G3. The new value is for the first monthly Leave Schedule and all Monthly schedules are updated to reflect the change.

### CHANGE THE CALENDAR YEAR

The Setup worksheet, as depicted in figure 3 above, allows the Calendar Year to be changed by editing the entry in cell G4. The new value is then used throughout the complete system.

### CHANGE THE LEAVE DESCRIPTIONS AND ABBREVIATIONS

The Setup worksheet, as depicted in figure 3 above, shows the default descriptions and abbreviations in columns F and G in rows 6 to 15.

These can be changed by editing the text in the relevant cells. The colors can **NOT** be changed.

### ENTERING EMPLOYEE DETAILS

Employee details are entered in the Setup worksheet, as depicted in figure 4 below, in columns A, B and C from row 5 down. These details are then automatically updated and used throughout the system.

<u>Employee</u>	<u>Department</u>	<u>Annual Leave Entitlement</u>
Joe Blog	Accounts	20
Jim Bigg	Sales	23
Jane Doe	Admin	20

Figure 4 Employee Details Setup

To enter a new employee:

- Enter Employee Name in column A
- Enter the Employee Department in column B
- Enter Annual Leave Entitlement in column C.

The individual Monthly Leave Schedules are produced in 12 individual workbook tabs, named Month1, Month2, Month3, etc. These tabs should **NOT** be renamed.

### ENTERING LEAVE DETAILS

To enter leave details:

- Select the appropriate month and the relevant employee
- For each date for which Leave is to be entered, entered the relevant Abbreviation code for the Leave Type to be entered as per [1] in Figure 5 below.
- For ease of use the Leave Category descriptions and corresponding Abbreviations are displayed above the monthly schedule as per [2] in Figure 5 below.
- To record a half day the relevant abbreviation should be followed by 2; i.e AL (Annual Leave) records a full day, while AL2 records a half day.

The cell color is automatically changed and the monthly and annual totals for the Leave Category are updated. Repeat the process for each Leave day for each employee.

**January 2014**

		Full Day		Annual Leave	AL	Compassionate Leave		CL	Time in Lieu		TL
		Half Day			AL2			CL2			TL2
		Sun	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Mon	Tues
					1	2	3	4	5	6	7
Employee	Department										
Joe Blog	Accounts		AL2	CL	TL	AL	TL2			CL2	ESL

Figure 5 Entering Leave Details

### MONTHLY LEAVE SUMMARIES

When the Leave details are entered in any particular month, the monthly summaries in columns AS to BH in the corresponding sheet are automatically updated as per figure 6 below.

March Monthly Summary										
	Annual Leave	Entitlement	Year-to-Date	Balance	Compassionate Leave	Time in Lieu	Sick Leave	Exam/Study Leave	Unpaid Leave	Public Holiday
Joe Blog	2	20	7	13	2	0	1	0	3	0
Jim Bigg	10	20	23	3	1	0	2	0	0	0
Jill Jones	2	20	6	14	1	1	1	0	0	0
John Doe	2	20	4	16	0	0	0	0	0	0
Jim Joy	2	20	5	15	0	0	0	0	0	0
John Small	1	20	2	18	1	1	0	0	0	0
Jane Doe	0	20	0	20	0	0	0	1	0	0
Big Guy	1	25	2	23	0	0	0	0	0	0
Jim Fixit	2	20	4	16	0	0	0	0	0	0

Figure 6 Monthly Leave Summary

Where the Leave days taken year-to-date exceeds the Annual Leave Entitlement for any employee this is highlighted in red as per example in figure 6 above.

### ANNUAL LEAVE SUMMARY

Select the Full Year tab. The Annual Summary is displayed as per figure 7 below.

		Summary for 2013							
Employee	Department	Annual Leave	Entitlement	Balance	Compassionate Leave	Time in Lieu	Sick Leave	Exam/Study Leave	Unpaid Leave
Joe Blog	Accounts	17	20	3	0	0	5	10	0
Jim Bigg	Manufacturing	28	20	8	11	0	22	0	5
Jill Jones	Sales	24	20	4	13	2	8	0	0
John Doe	IT	22	20	2	0	0	0	0	0
Jim Joy	Admin	23	20	3	0	0	0	0	1
John Small	Manufacturing	11	20	9	11	12	2	0	0
Jane Doe	Shipping	1	20	19	0	0	0	10	0
Big Guy	Admin	11	25	14	0	0	0	0	0
Jim Fixit	IT	22	20	2	0	3	0	5	3
		0	0	0	0	0	0	0	0
		0	0	0	0	0	0	0	0

Figure 7 Annual Leave Summary

### FILTERING BY DEPARTMENT

For convenience all schedules and monthly and annual summaries can be filtered by Department. To filter on a particular Department, select the dropdown list as per [1] in figure 8 below and select the appropriate Department as per [2] in figure 8 below.

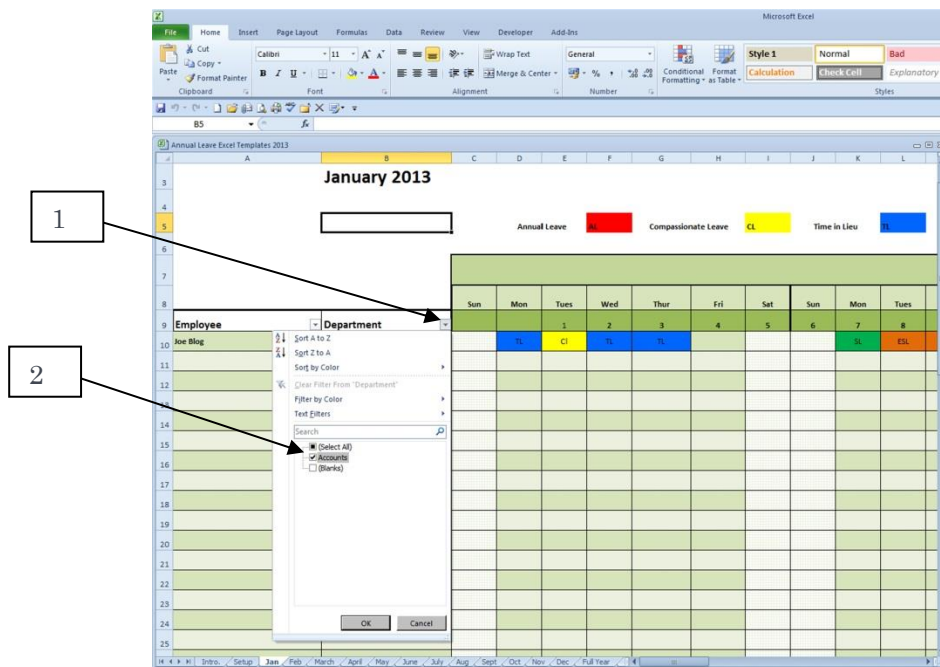


Figure 8 Filtering by Department

## PRINTING SCHEDULES AND SUMMARIES

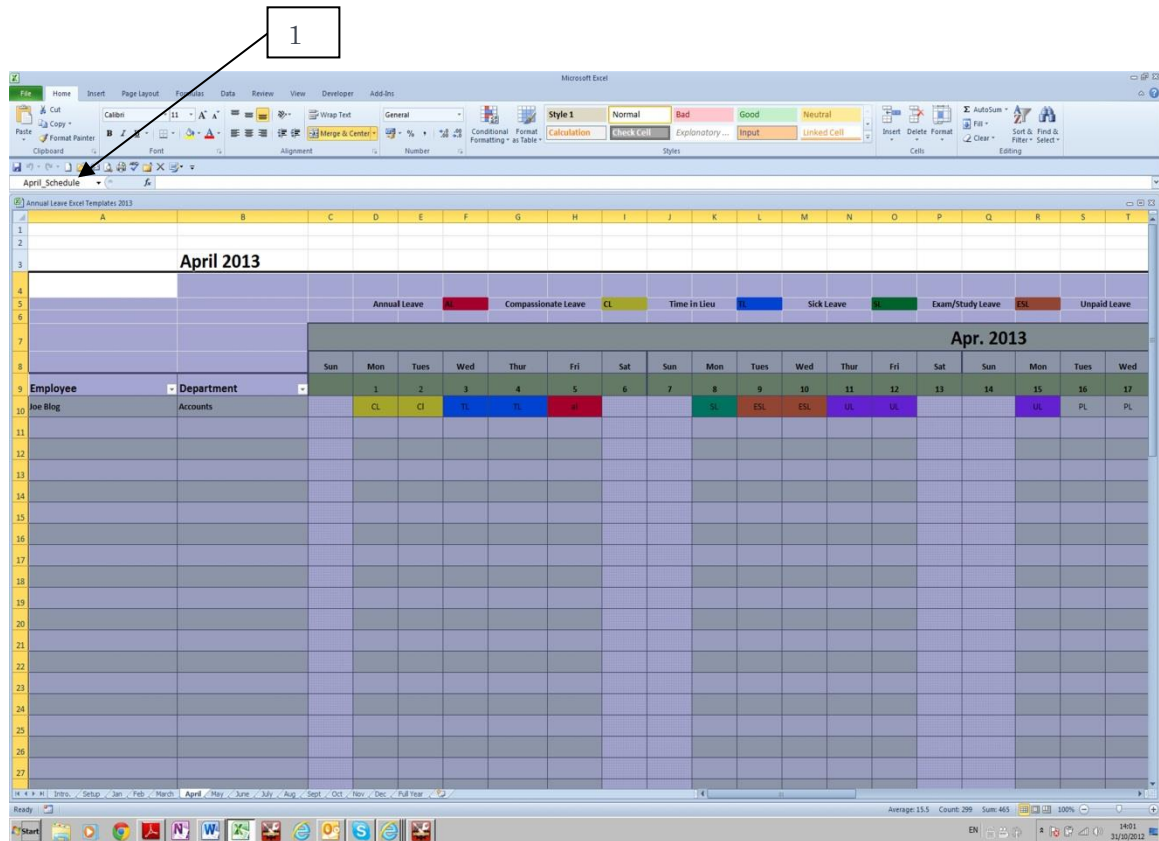


Figure 7 Monthly Summary Printing

The particular schedule or summary to be printed can be selected for the dropdown list as per [1] in figure 7 above.

Choose the desired Printer.

Choose to print “Selection”

Set the page Orientation or Landscape as appropriate

The report can be scaled to 1 Page Wide or 1 Page Tall or Fit-to-Page Printing, depending on the specific Printer type

The specific details may vary depending on the printer chosen.