Annual Leave Schedule

An excel based solution, which is macro free, so can be viewed on tablets and smartphones. Providing the following advantages for HR managers and business owners who wish to track the leave schedule of their staff.

Track the requested leave of up to 20 staff members

Allow for two locations, in two countries

Consider weekends and Bank Holidays

Show company closure dates

Choose if company closure date affect leave or not

Allow manager to approve or deny leave requests

Show status of all leave requests on one calendar

Allow manager to allocate compulsory leave

Manager has the ability to change leave periods
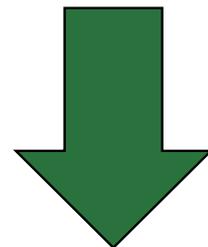
Simple to use and monitor

And so much more…

Monitor and approve your staff's annual leave with this simple but effective spreadsheet.

Find details in our store – spreadsheetsolutions.biz/store

Scroll down to see more about this product

	Enter year as '2017' for the calendar year required.	Demo Video	Alternative video link

Monitored Year: 2017

Demo Video

Watch on Youtube

These are periods within the year above, where your company closes. Mark yes if the closure counts towards staff annual leave.

	Count as Leave	Start Date		End Date
1st Company Closure Period:	Yes	01/01/2017	to	06/01/2017
2nd Company Closure Period:	No	10/07/2017	to	16/07/2017
3rd Company Closure Period:	Yes	25/12/2017	to	31/12/2017

Select the calendar year of the leave schedule, and then select up to 3 periods, where the company will be closed. If your business does not close at all, simply leave them blank. You can then choose whether or not you staff will be forced to take leave over those periods. If you choose yes, then the required number of days will be removed from their leave, and the holidays will reflect on the calendar. If you select no, the closure will still show, but no leave will be allocated.

Name of Alternative Country: USA

Feel free to use the spaces below the UK bank holidays if you wish to add bank holiday days to the UK staff.

Date Format: dd/mm/yyyy

Bank Holidays - UK	Bank Holidays - USA
02/01/2017	02/01/2017
14/04/2017	16/01/2017
17/04/2017	30/01/2017
01/05/2017	04/07/2017
29/05/2017	04/09/2017
28/08/2017	09/10/2017
25/12/2017	10/11/2017
26/12/2017	23/11/2017
	24/11/2017
	25/12/2017

Next you can select a second country (if you have staff in two countries), or you can use the 2nd country if all of your staff are in a country other than the UK. You can allocate any bank (public) holidays to the respective country, the UK bank holidays will calculate automatically. These national holidays will not be counted when leave is calculated, and they will show on the calendar. You can also select your preferred date format.

Staff Name	Location	Annual Leave	Carried Over	Requested	Approved	Remaining
Richard	UK	20	2	0	12	10
Mary	UK	20	2	0	17	5
Sean	USA	18	3	0	8	13
Colin	USA	18	2	0	8	12
Sarah	USA	18	4	0	8	14
Chris	UK	20	5	0	7	18
Andrea	UK	20	3	0	7	16
Mark	USA	18	2	0	8	12

You can then list up to 20 staff members, and allocate then to their respective country. If you are only using one country, then assign them all to that country. Fill in how many days leave each person is entitled to per year, and how many days they have carried over from the last year. Each time leave is approved, it will edit the balance, and show how many days each staff member has still owing. That number will then be the 'carried over' number for the following year.

Leave Request Form

Please keep in mind that if there is a leave request, which overlaps company closure time which was due to be taken as leave, it WILL count the leave days twice. The same will happen if you put in duplicate leave requests for the same (or an overlap of) time.

| Request Details | | Requested Leave Period | | Total | Days | Days Remain |
Request Date	Name	Start Date	End Date	Days	Leave	After Leave
28/10/2016	Richard	09/01/2017	15/01/2017	7		
21/11/2016	Mary	09/01/2017	22/01/2017	14		
10/01/2017	Sean	23/01/2017	29/01/2017	7	5	8

Any staff member who has access to this spreadsheet, will be able to fill in a leave request form. This simple consists of one line of data as shown above. The red cells will need to be completed, and the green will be calculated. The person requiring leave (or a supervisor) can fill in the request date, the person's name, the start date and end date of the leave period. This period can include bank holidays and weekends, but should not include any time where the company is closed and leave is compulsory.

Once this has been filled in, the green sections will calculate, and the request for leave will be live, and will show on the calendar. This is all that is required at this stage, and the responsibility is now up to the person who needs to approve the leave.

✓	Approved		Requiring App.
✗	Declined		1

App. Status	Approval Name & Period		
	Name	Start Date	End Date
✓	Richard	09/01/2017	15/01/2017
✓	Mary	09/01/2017	22/01/2017

The supervisor of manager will have access to another sheet on the spreadsheet, which can be hidden and locked as required. This sheet will show the details of the request, and have a section (pictured above) where the manager can click on each column, and select the date. The details from the request will be the default selection to make mistakes less likely. This is to ensure that the leave request can not be edited once approved. Once the manager takes these steps, the leave will show as confirmed on both sheets and the calendar. All leave figures will then reflect this leave.

| Calendar | | | Approved Leave | | | | Requested Leave | | | | Weekends | | | Bank Holidays | | Company Closures | | | | | | | | | | | | | | | | |

January 2017	2017 Sun Jan 01	2017 Mon Jan 02	2017 Tue Jan 03	2017 Wed Jan 04	2017 Thu Jan 05	2017 Fri Jan 06	2017 Sat Jan 07	2017 Sun Jan 08	2017 Mon Jan 09	2017 Tue Jan 10	2017 Wed Jan 11	2017 Thu Jan 12	2017 Fri Jan 13	2017 Sat Jan 14	2017 Sun Jan 15	2017 Mon Jan 16	2017 Tue Jan 17	2017 Wed Jan 18	2017 Thu Jan 19	2017 Fri Jan 20	2017 Sat Jan 21	2017 Sun Jan 22	2017 Mon Jan 23	2017 Tue Jan 24	2017 Wed Jan 25	2017 Thu Jan 26	2017 Fri Jan 27	2017 Sat Jan 28	2017 Sun Jan 29	2017 Mon Jan 30	2017 Tue Jan 31
Name																															
Richard																															
Mary																															
Sean																															
Colin																															
Sarah																															
Chris																															
Andrea																															
Mark																															
Andrew																															
Colleen																															
Claire																															

At any stage, you can view the annual calendar, laid out month by month. This calendar will not only show company closure, bank holidays in each country and weekends, but also requested and approved leave. You will be able to see the leave status of each individual employee (as pictured above), green showing approved leave and red the requested leave. Any compulsory leave during company closure will also be shown here.

As these are spreadsheets, and not programmed software, you can decide how you use them. Each spreadsheet can be saved into the file of your choice, and renamed as desired. You can set up your own system, to your own requirements, and then use the spreadsheets within that system. You can use as many of these spreadsheets as you require within your business, and you can choose which staff have access to them.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.

All the other links you may need for more information, or to purchase this product, are below.

In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£240

This product is created by:

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