

Manager Self Service: Setting a Self Service vacation rule

This guide will help you use Manager Self Service to arrange for an appropriate approver to action notifications for your staff if you are not available.

The Self Service vacation rule allows you to arrange for notifications you would usually receive, to be automatically reassigned to another manager to action. This should be used for example, when you are on annual leave.

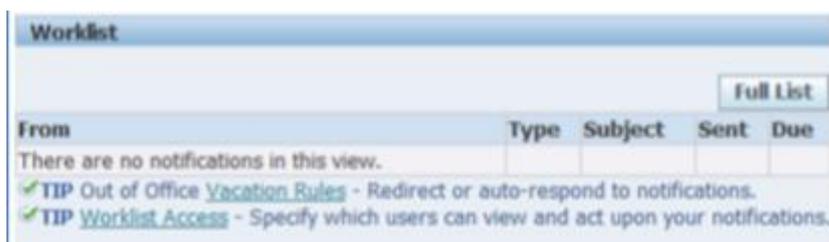
If you are away from work unexpectedly, for example, absent due to sickness, if you are not able to set the rule yourself, the Self Service team can set up the vacation rule, provided that they are advised of the details.

The person you set to receive your notifications must be at the appropriate level. They must either be at the same or higher management level than you in the reporting hierarchy for your service. You must not allocate notifications downwards in the hierarchy as this is contrary to KCC Financial Regulations.

It is important that vacation rules are set up so that notifications such as claims are actioned in a timely way. Claims need to be approved on, or before the 10th of the month to ensure payment in that month's pay. Claims approved after this date will be automatically paid in the following month.

Setting a vacation rule:

1. On the Self Service home page, select the option 'TIP Out of Office Vacation Rules'.



2. The 'Out of Office Rules' screen will appear. If any rules have previously been created they will be displayed in the 'Rule Name' section and the status will either be 'Active' or 'Inactive'.
3. To create a new rule select 'Create Rule'.
4. On the following screen, select 'HR' from the 'Out of Office Item Type' drop down list and then click on the 'Next' button. By selecting 'HR' this will set the rule for your HR Self Service related notifications only i.e. the rule won't apply to iProcurement notifications.

5. On the next screen the item type will be confirmed as 'HR'. Ensure that the Notification is set to 'All' and then click on the 'Next' button.
6. On the following screen use the calendar icon to select the start and end dates the vacation rule should apply for. You can also edit the time it starts and ends. This needs to be in the 24 hour clock format 00:00:00.
7. In the 'Message' box, you can enter a message that will be included with the notifications when they are redirected.
8. In the 'Reassign' section, ensure that 'All Employees and Users' is selected from the drop down menu.
9. In the 'Reassign' field you need to enter the person you want notifications to be diverted to. Click on the magnifying glass icon and a pop up search box will appear.
10. In the 'Search and Select' box you can search for the person by their Name, Username or E-mail. If you are searching by their name, you need to type the surname first, then a percentage sign and then the first name e.g. Smith%John and then click on 'Go'.
11. When you have found the correct person, click on the 'Select' button.
12. You will be returned to the Out of Office screen and the name of the person should now be displayed in the 'Reassign' field.
13. Make sure that the option 'Transfer notification ownership' is selected.
14. Then click 'Apply'.
15. You will be returned to the 'Out of Office Rules' screen and the vacation rule you have set up will be displayed.
16. If the vacation rule is taking immediate effect the 'Status' will say 'Active'. If the vacation rule will be starting in the future, the 'Status' will say 'Inactive', but will take effect from the start date and time you specified.

Amending a vacation rule:

You can update/change any aspect of your vacation rule by clicking on the 'Update' button.

1. On the Self Service home page, select the option 'TIP Out of Office Vacation Rules'.
2. The 'Out of Office Rules' screen will appear. If a vacation rule has been set up this will be displayed.
3. Click on the 'Update' icon, make your changes and then click on the 'Apply' button.

Ending/deleting a vacation rule:

If, for example, you return to work before you expected to, the vacation rule can be turned off. There are two options for doing this:

Amend the end date of the rule:

1. On the Self Service home page, select the option 'TIP Out of Office Vacation Rules'.
2. The 'Out of Office Rules' screen will appear. If there is an active vacation rule this will be displayed.
3. To keep a record of the rule having been in place, click on the 'Update' icon and amend the end date and time. Then click on the 'Apply' button. If you select a date and time that has passed, the status of the rule will say 'Inactive' when you return to the 'Out of Office Rules' screen.

Deleting the rule:

1. Follow steps 1 and 2. If you wish to delete the rule, on the 'Out of Office Rules' screen click on the 'Delete' icon. You will be asked if you're sure you want to delete the rule. Click on 'Yes' and the vacation rule will be deleted.

Help and Support:

If you have any technical issue, log into Service Now and raise a call by selecting the 'ICT' Service on the left hand side of the screen or alternatively us the 'Chat' function. If you are not able to access Service Now, e-mail ICTservicedesk@cantium.solutions and they will raise a request on your behalf.

If you have an HR related query, log into Service Now and raise a call by selecting the 'Human Resources' Service on the left hand side of the screen or alternatively us the 'Chat' function.

