Back to Basics: Annual Leave

4. Annual Leave Notifications

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Back to Basics Sessions

- Managing Annual Leave Requests
- Annual Leave Entitlements
- Annual Leave Hours
- **Annual Leave Notifications**
- Annual Leave Rules

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Objective

To understand the basics of how notifications work and to understand the key notifications that you will want to consider when managing annual leave.

Agenda

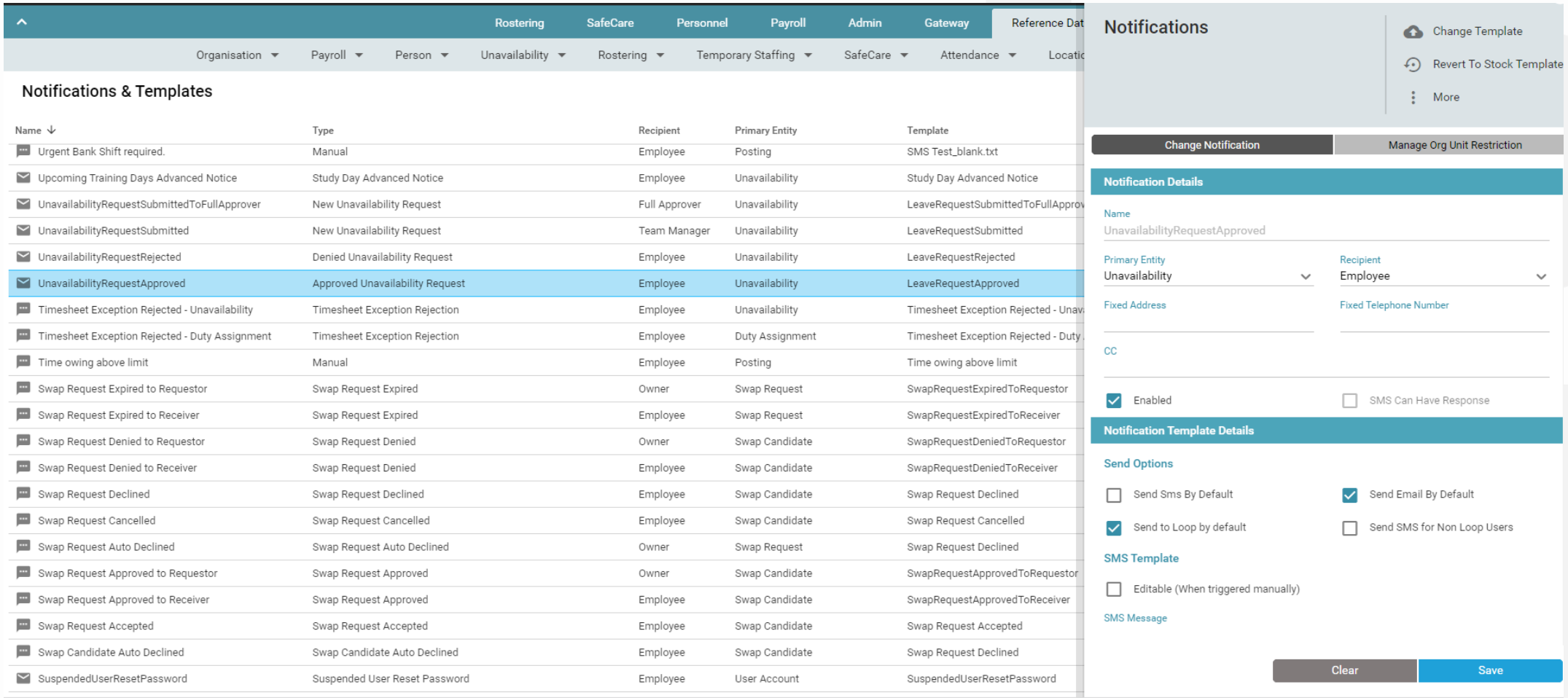
- Notification Templates
- Unavailability Notifications
- Notification Log
- Supporting Documentation

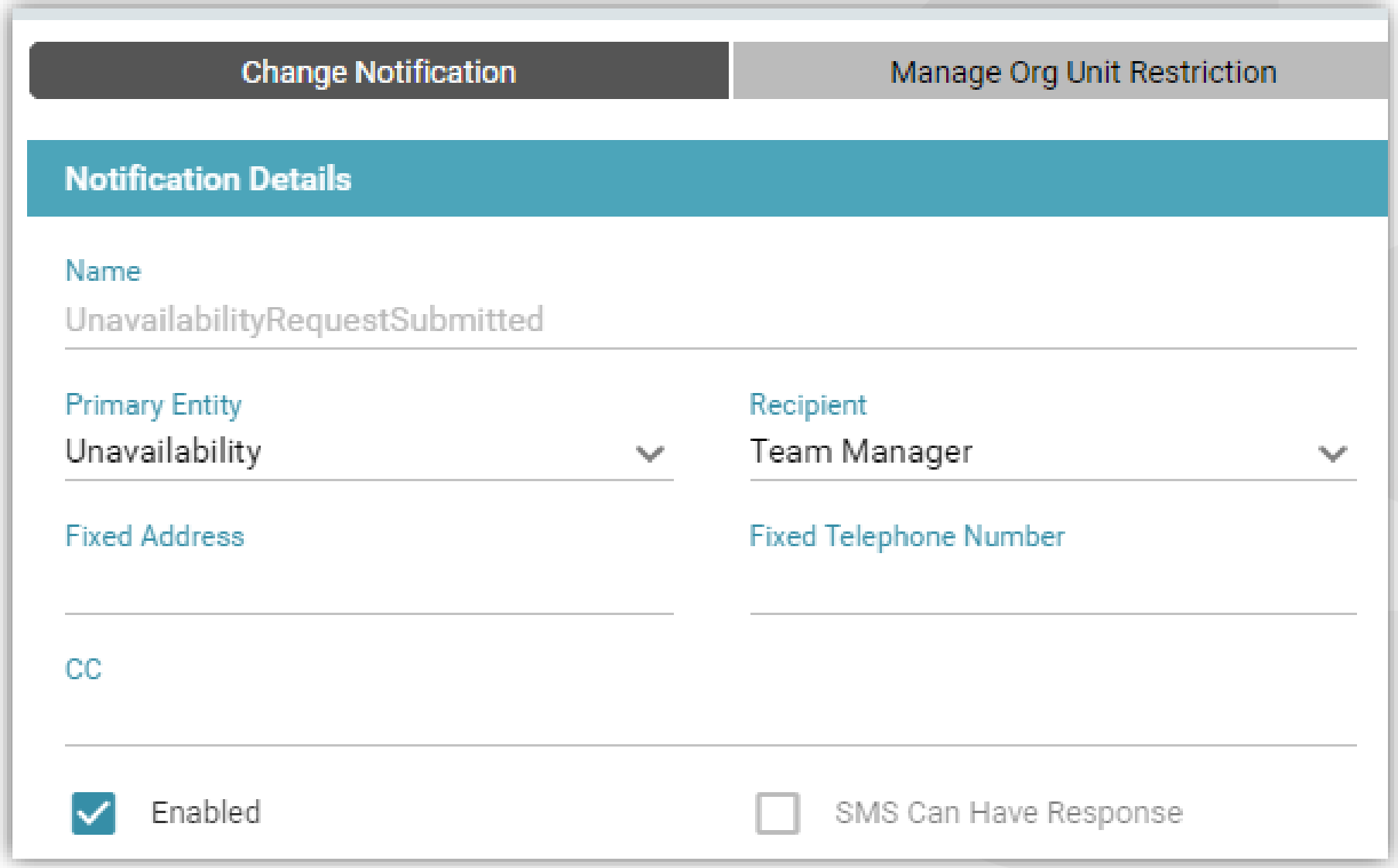
Notification Templates

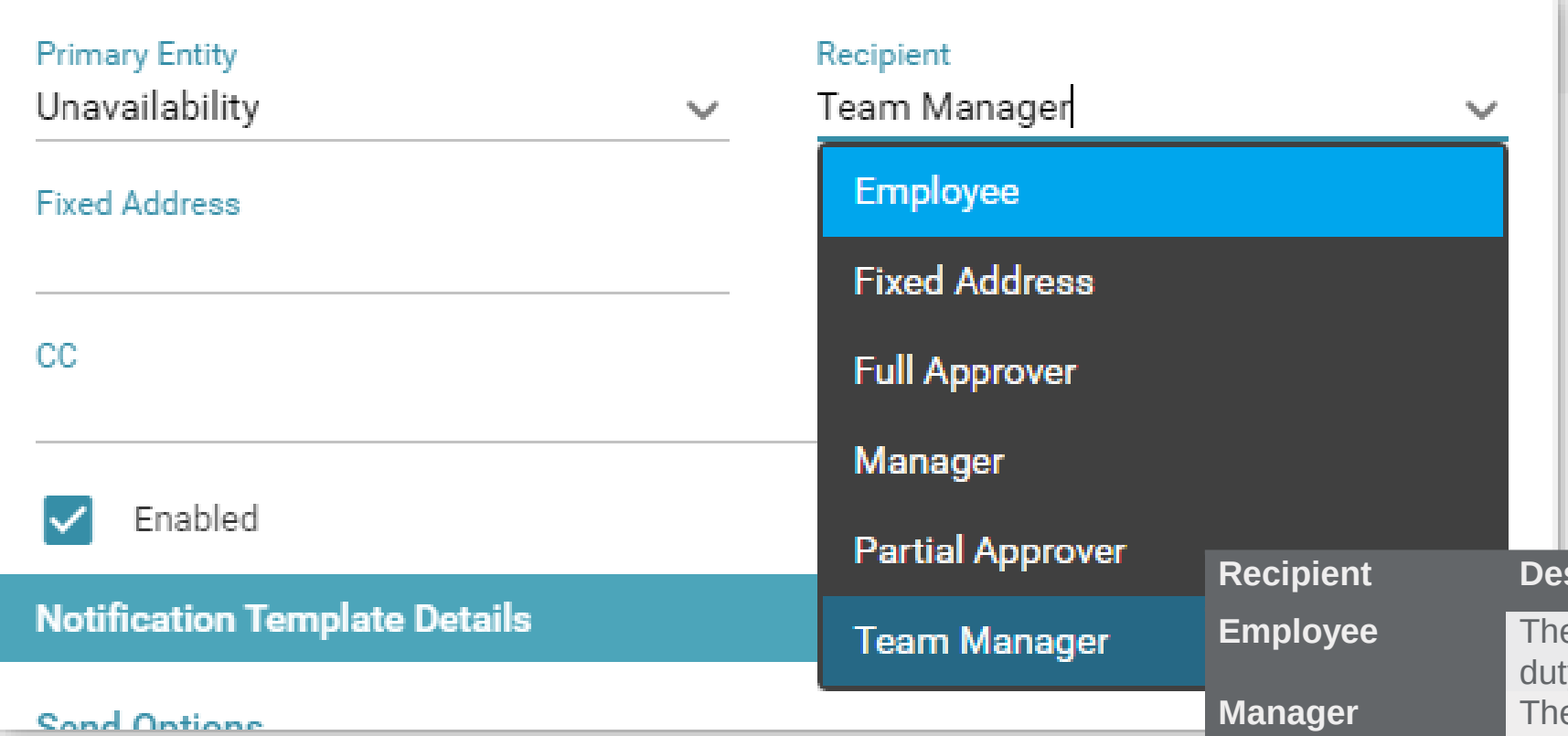
Reference Data> Notifications> Notification Templates

Ref Data Tools: Notifications

Ref Data Actions: Notifications




Change Notification
Manage Org Unit Restriction
Notification Details
Name
UnavailabilityRequestSubmitted
Primary Entity
Unavailability
Recipient
Team Manager
Fixed Address
Fixed Telephone Number
CC
Enabled
SMS Can Have Response



Recipient	Description
Employee	The person assigned to the duty/unavailability/person/pattern etc.
Manager	The first approver of the associated roster
Team Manager	The manager of the team set up in the unit
Fixed Address	Specific email address or telephone number
Full Approver	Nominated second approver on the demand template
Partial Approver	Nominated first approver on the demand template
Request Creator	Bank / Agency request creator
Owner	Flag owner (Safecare)
Initiator	The person who triggers the notification (e.g. send to yourself)

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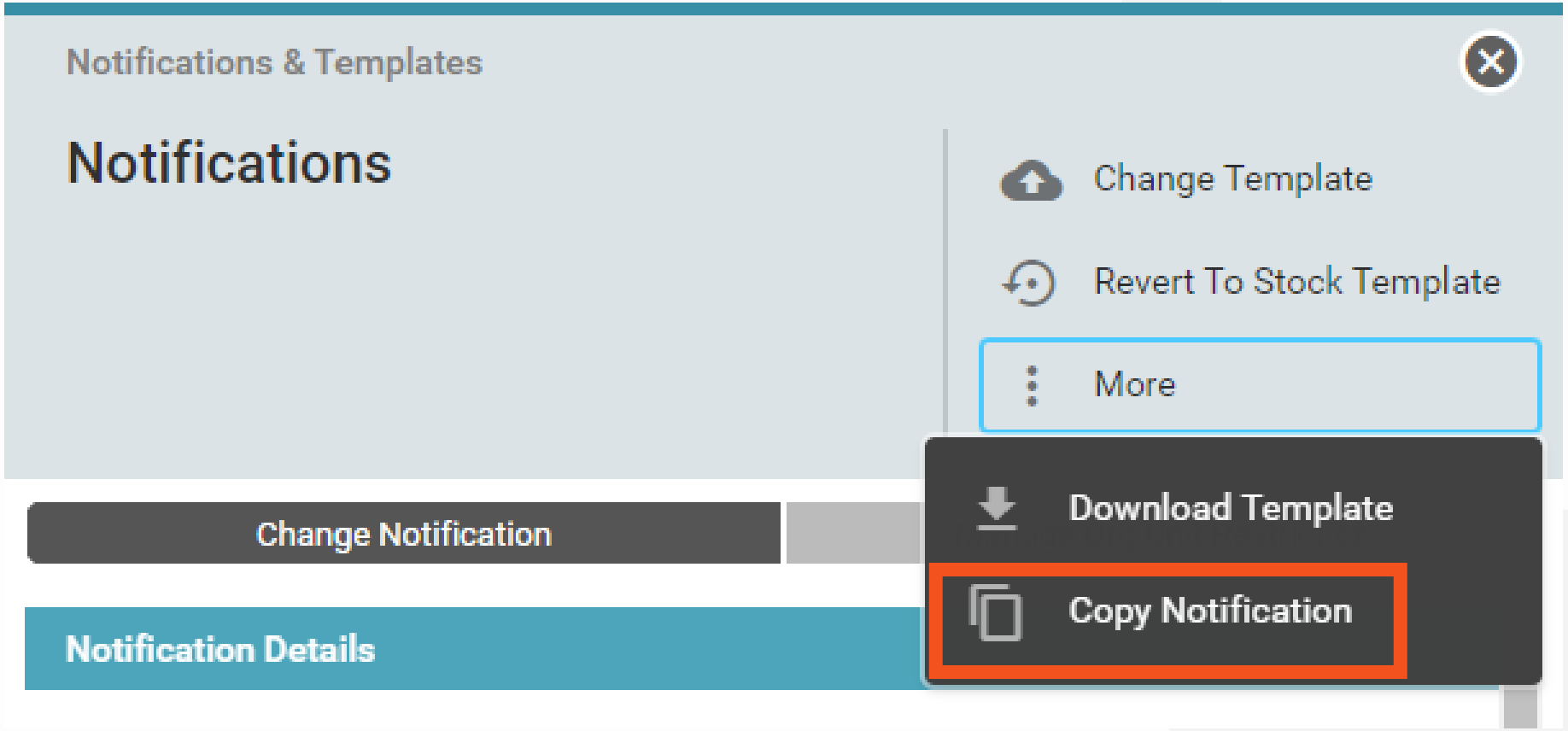
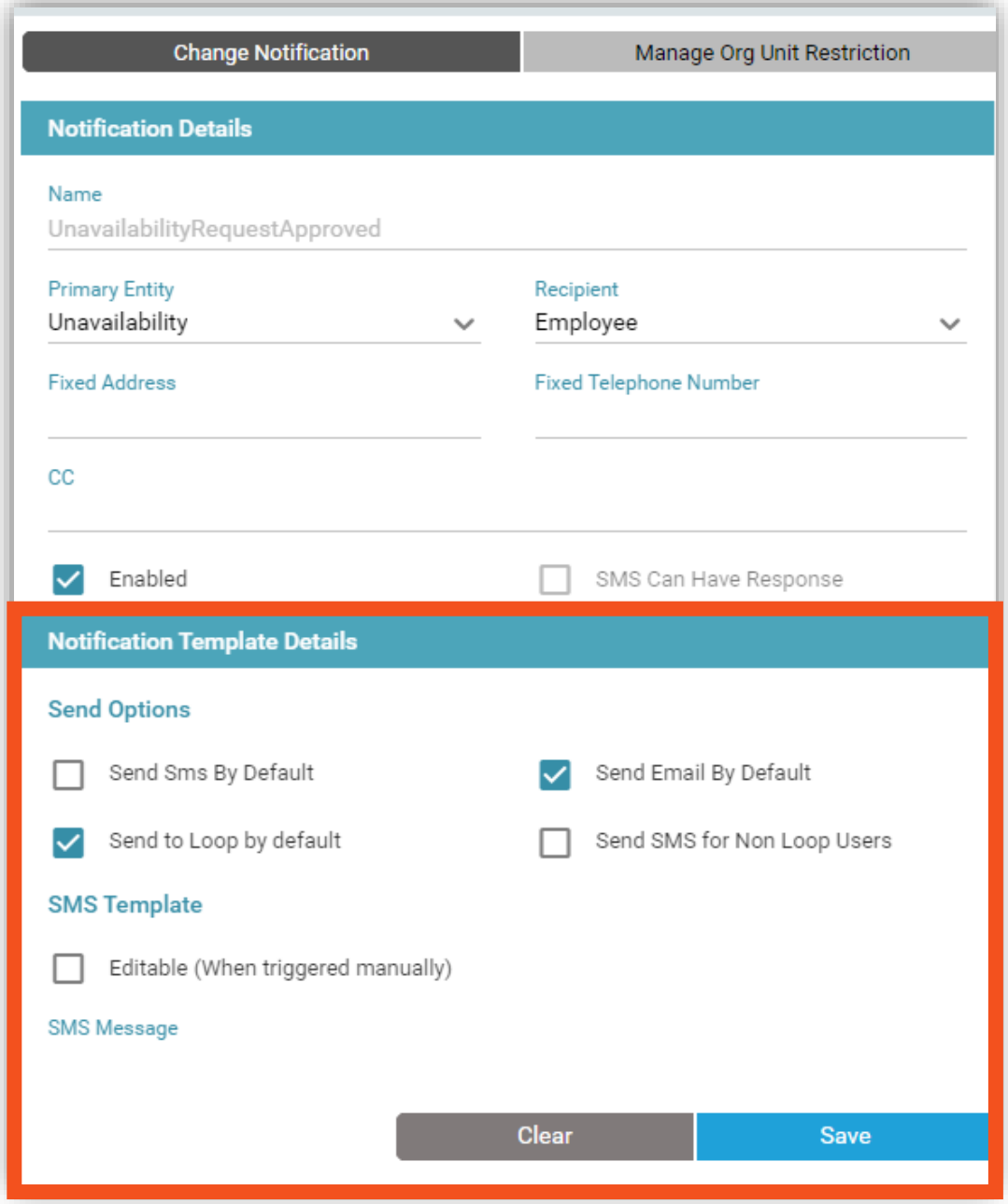
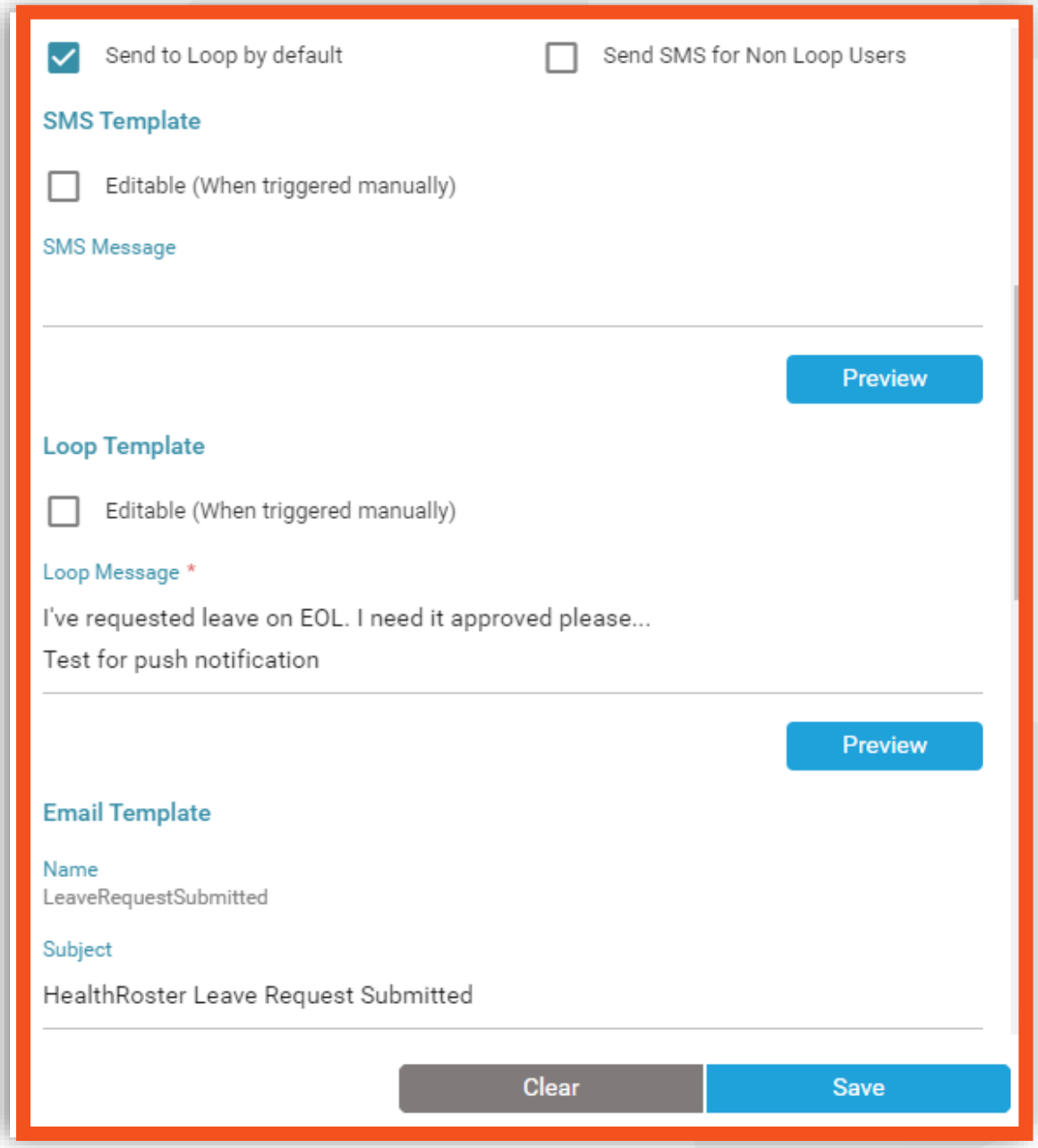
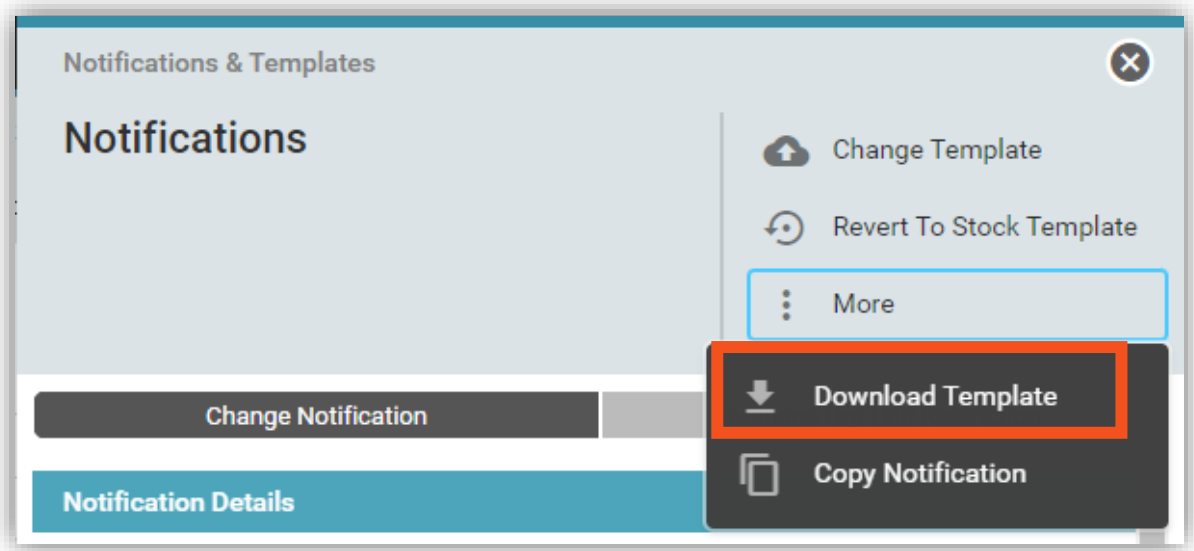
Copy Notification




Change Notification
Manage Org Unit Restriction
Notification Details
Name
UnavailabilityRequestApproved
Primary Entity
Unavailability
Recipient
Employee
Fixed Address
Fixed Telephone Number
CC
Enabled
SMS Can Have Response
Notification Template Details
Send Options
Send Sms By Default
Send Email By Default
Send to Loop by default
Send SMS for Non Loop Users
SMS Template
Editable (When triggered manually)
SMS Message
Clear
Save


Send to Loop by default
Send SMS for Non Loop Users
SMS Template
Editable (When triggered manually)
SMS Message
Preview
Loop Template
Editable (When triggered manually)
Loop Message *
I've requested leave on EOL. I need it approved please...
Test for push notification
Preview
Email Template
Name
LeaveRequestSubmitted
Subject
HealthRoster Leave Request Submitted
Clear
Save



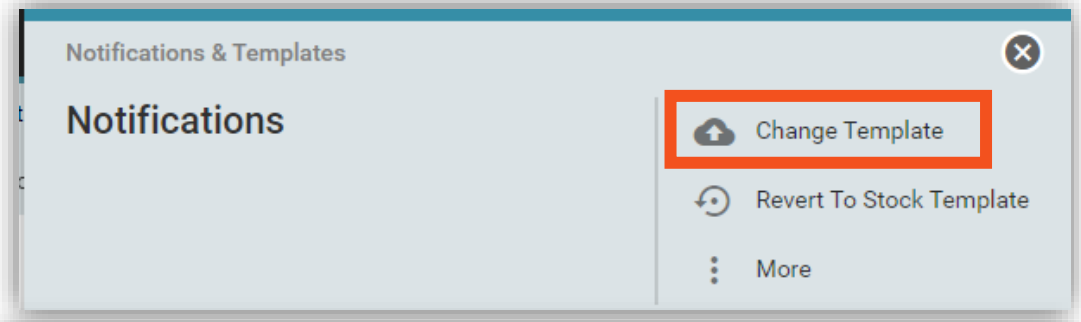
*LeaveRequestSubmitted - Notepad

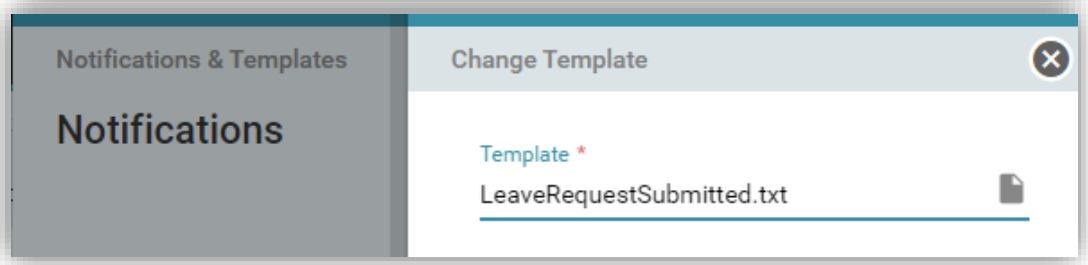
File Edit Format View Help

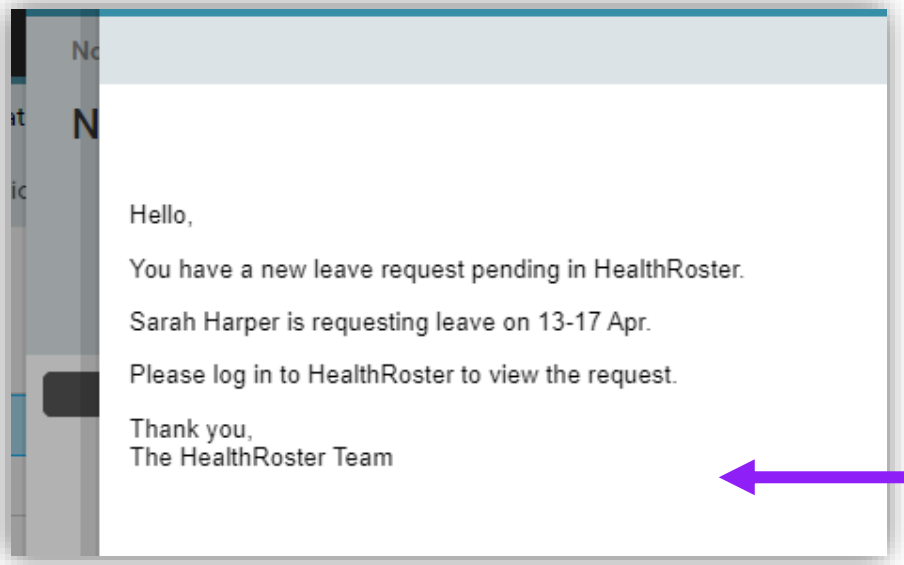
```
        <head>
                <title></title>
        </head>
        <body>
                <div style="font-family: sans-serif;font-size:10.0pt;">
                        <p>Hello,</p>
                         <p>You have a new leave request pending in HealthRoster.</p>
                         <p>${Person.Forenames} ${Person.Surname} is requesting leave on ${DateRange}.</p>
                        <p>Please log in to HealthRoster to view the request.</p>
                        Thank you,<br />
                        The HealthRoster Team<br />
                        <br />
                        <img src="cid:AllocateSoftwareRight3"/>
                </div>
        </body>
</html>
```

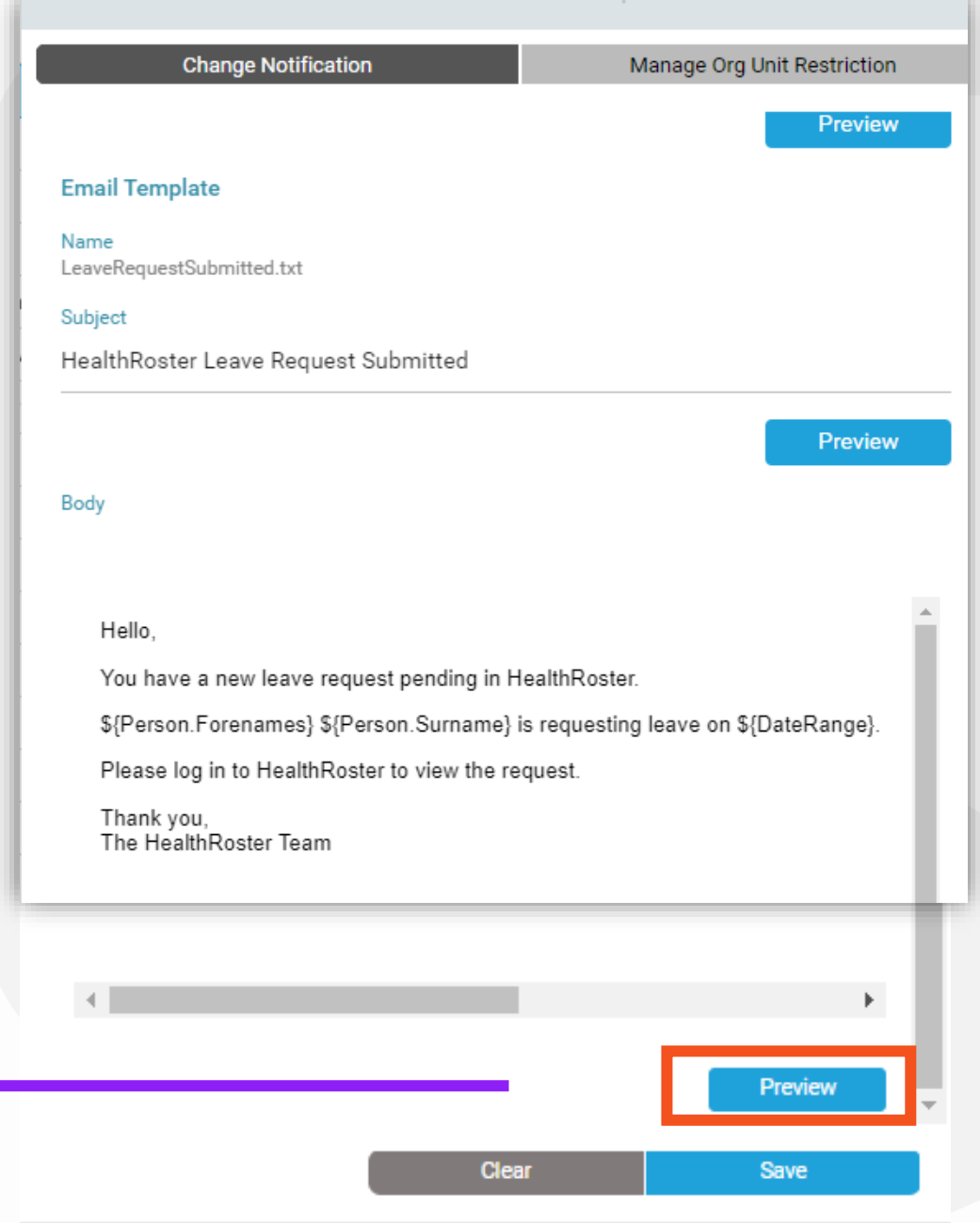
Note

Do not change the sections of the template that contain code (text or items contained in the <> or ${}) as this would affect the information displayed when the email is sent.

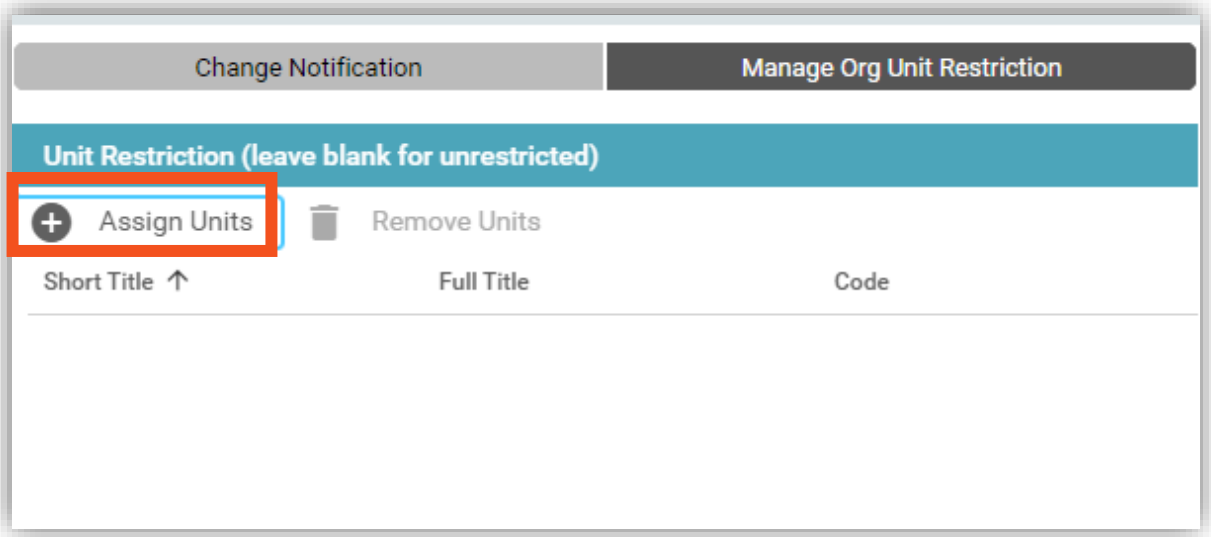

Notifications & Templates
Notifications
Change Template
Revert To Stock Template
More

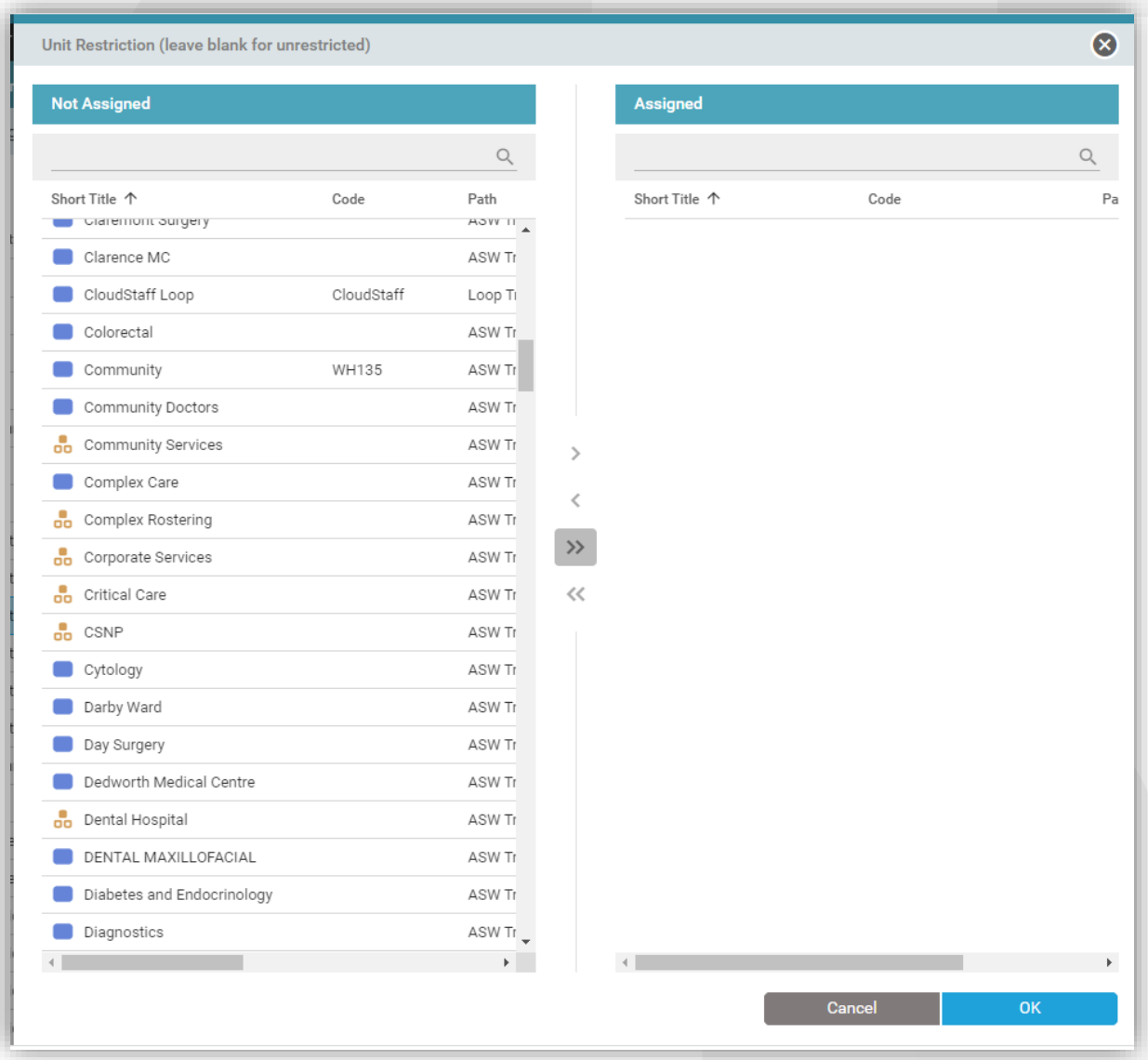

Notifications & Templates
Notifications
Change Template
Template *
LeaveRequestSubmitted.txt


Hello,
You have a new leave request pending in HealthRoster.
Sarah Harper is requesting leave on 13-17 Apr.
Please log in to HealthRoster to view the request.
Thank you,
The HealthRoster Team


Change Notification
Manage Org Unit Restriction
Preview
Email Template
Name
LeaveRequestSubmitted.txt
Subject
HealthRoster Leave Request Submitted
Preview
Body
Hello,
You have a new leave request pending in HealthRoster.
${Person.Forenames} ${Person.Surname} is requesting leave on ${DateRange}.
Please log in to HealthRoster to view the request.
Thank you,
The HealthRoster Team
Preview
Clear
Save

Manage Org Restriction

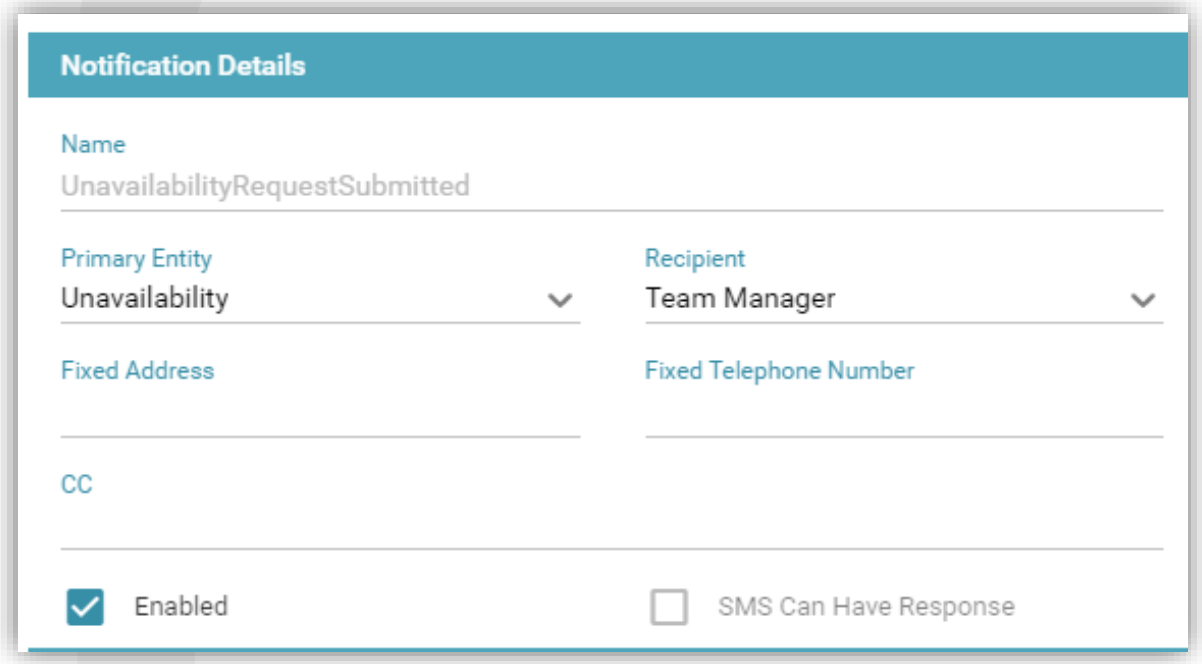




Unavailability Notifications

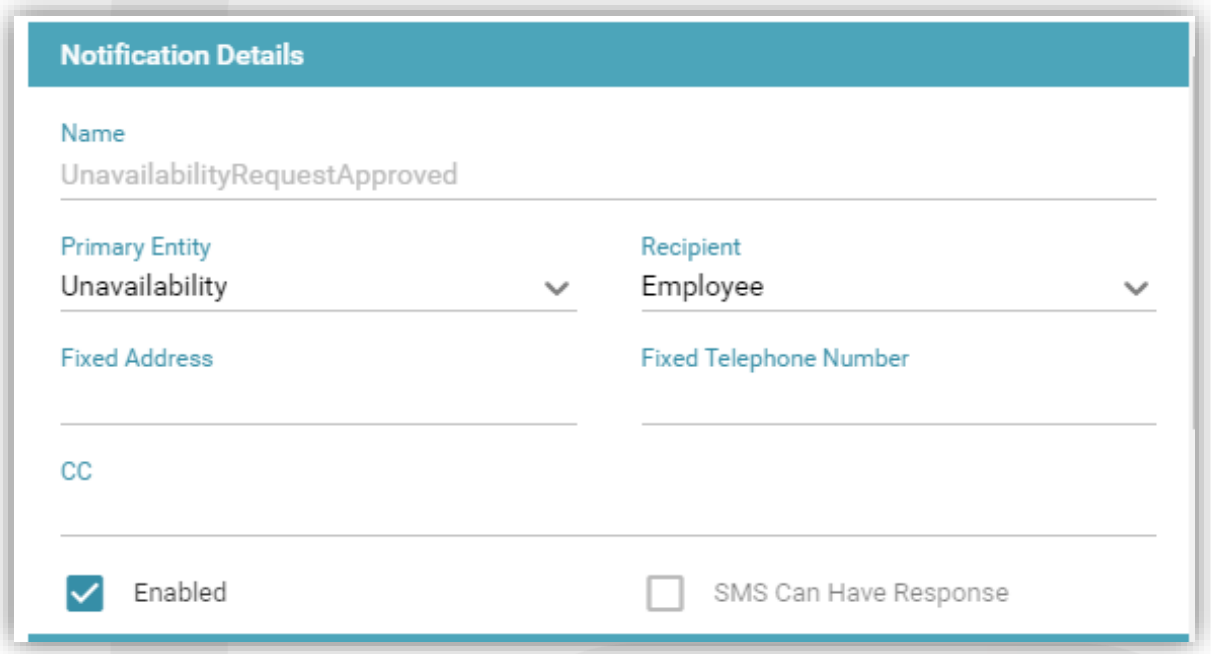
Unavailability Request Submitted

- Sent to the set recipient when an employee requests an unavailability
- Notification will send to recipient (e.g First Approver)
- Anyone with feature access *Unavailability Actions: Approve and Reject*, and the visible unit will be able to approve
- Common Recipient is Team Manager, First Approver or Second Approver



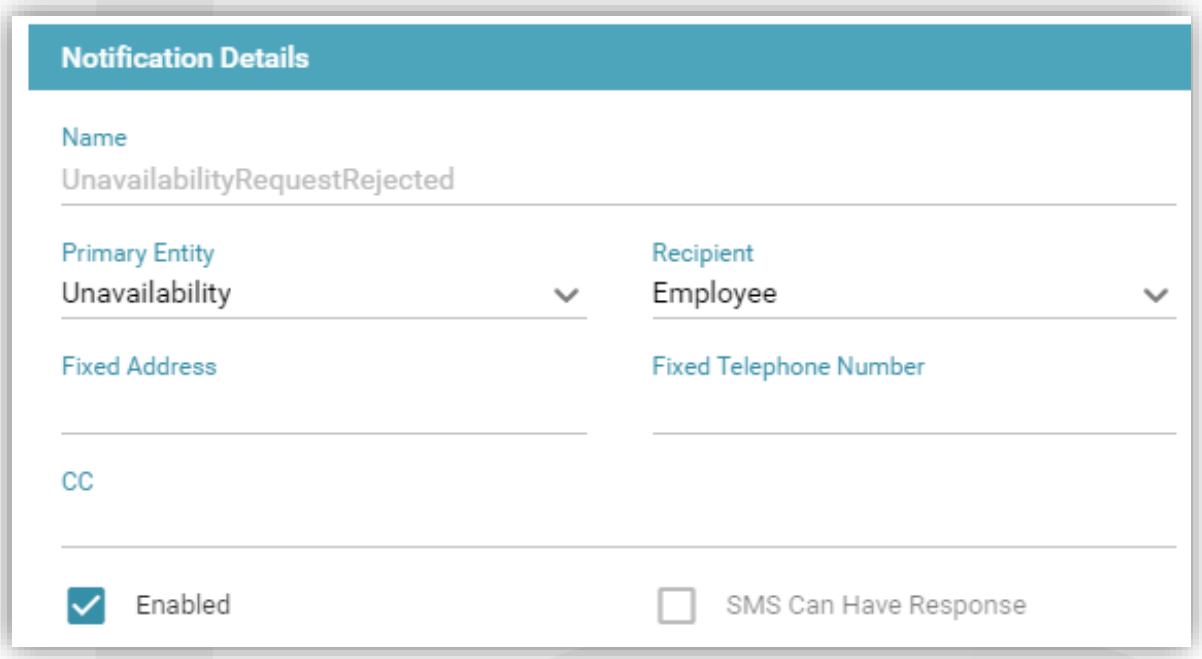
Unavailability Request Approved

- Sent to employee when unavailability request is approved
- Approval requires *Unavailability Actions: Approve and Reject* and visible unit
- Recommended recipient: Employee



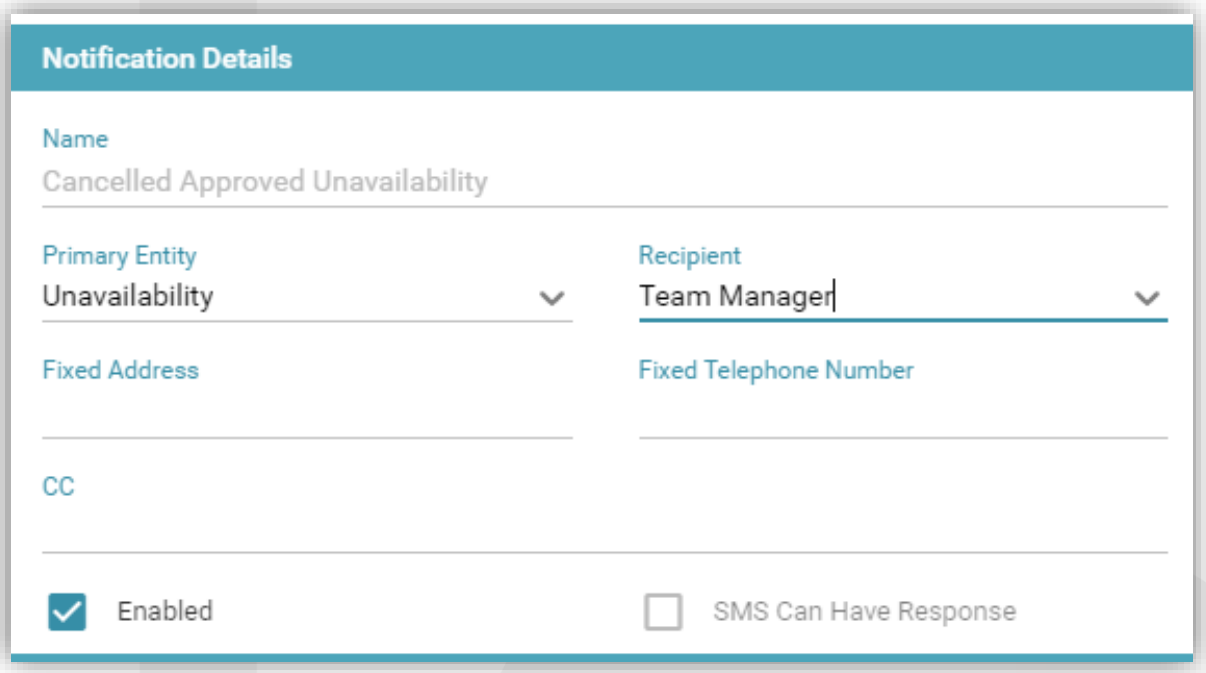
Unavailability Request Rejected

- Sent when unavailability request is rejected
- Rejection requires *Unavailability Actions: Approve and Reject* and visible unit
- Recommended recipient: Employee



Cancelled Approved Unavailability Request

- Sent when employee cancels approved unavailability request
- Employee requires *Employee Online: Can Cancel Approved Unavailabilities*
- Common Recipient is Team Manager, First Approver or Second Approver



Notification Log

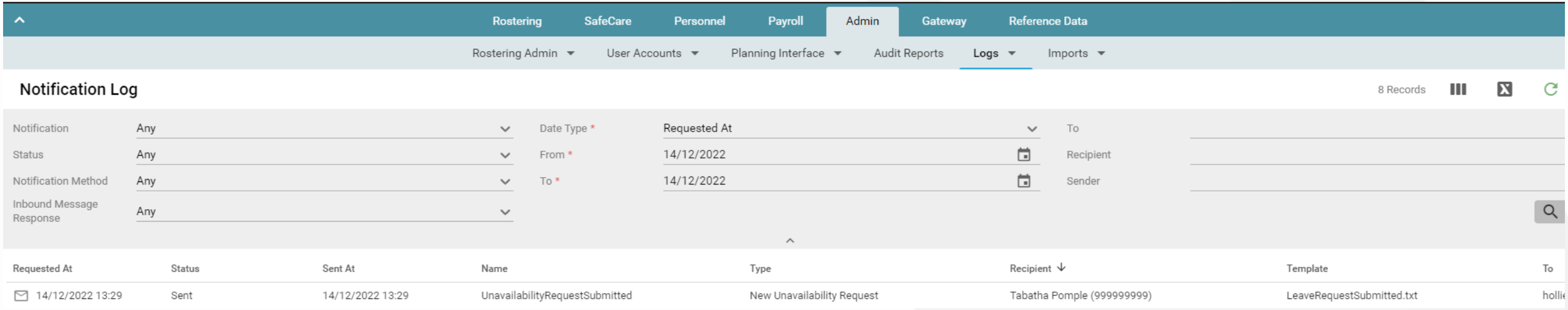
Admin>Logs>Notification Log

Ref Data Actions: Notifications

Ref Data Tools: Notifications

Admin>Logs> SMS Notification Log

Ref Data Tools: SMS Notification Log



Supporting Documents

- HealthRoster 11 – Notifications Feature Guide.pdf

  https://www.allocate.support/hc/en-us/articles/4415921428882

Questions?

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