Back to Basics: Annual Leave

Annual Leave Notifications

Introduction

As you are likely aware, notifications are a key part of annual leave management as they notify both the end users, and the managers that these requests exist, and of the approval status of their request. They are also useful for keeping audits of these periods too. This guide will outline the basics of where these notifications are set up, which ones are the key ones to keep up to date, and while there are many types, the main consideration of this guide will be the automatic unavailability notifications.

1. Notification Templates

The key area that you will need to consider when thinking about notifications is the notification template section that is found in Reference Data> Notifications> Notification Templates. This is the place where you can configure who receives the notification, what form it is sent in (Email, SMS, Loop) and the text that is sent out within the notification. You will need the feature accesses *Ref Data Tools: Notifications* and *Ref Data Actions: Notifications*.

In this section you see a list of the notification templates that exist in your system. There is a guide (see supporting document section) that goes through the basics of these templates, and setting them up, but as an overview you will see the Notification Name, Type, whether it is Stock, Recipient, Entity, Template Name, whether it is Enabled and Template Type.
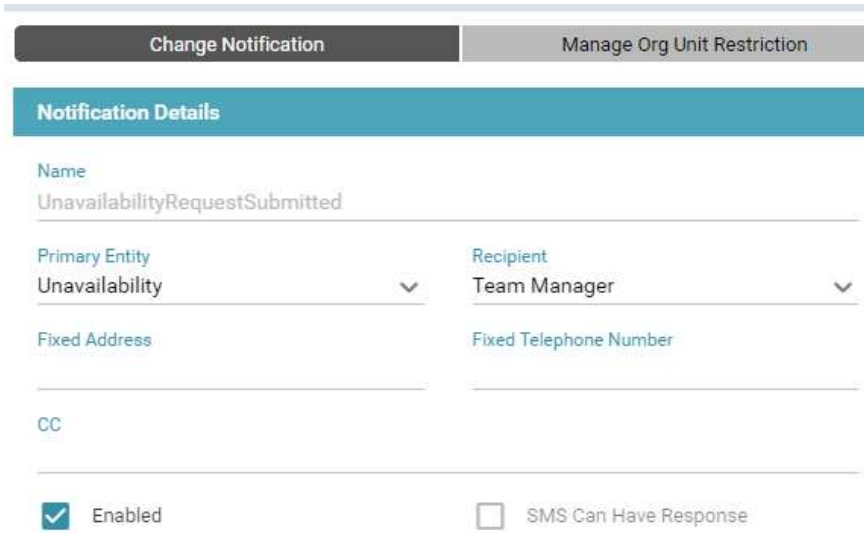

When you single click on one of them, it will open a new window on the right, which displays the details of the notification template.

- The first key section to consider is the Notification Details section of the Change Notification Tab:

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

- For most annual leave notifications, the name of automatic ones will be hard coded into the system, and the 'Primary Entity', which is where the system refers to when triggering the notification, will usually be auto-populated to Unavailability, and will not need altering.

- The 'Recipient' is one of the main areas that you will want to configure yourself, you may see different options depending on the notification template.

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)

The key ones that you will need for unavailability notifications will likely be Employee, Team Manager, Manager, Fixed Address, Full Approver and Partial Approver. You simply select who it is that you would like to receive the notification, and will send to them when the action triggers it.

- To ensure the notification is active, you need to tick the 'Enabled' box:

- Below these fields, you will see the Notification Template Details:

- Unavailability notifications tend to be sent out via email as default, although this can be set to send via SMS or Loop if required. If sent via email, the system will use the email address in the Email Address field of the User Account.

- Below these options are the fields where you can specify the message within the notification.

- For SMS and Loop these can be typed directly into the free text fields.

- For emails you will need to upload the template in with a .txt file. The simplest way to do this is to use the 'Download Template' feature in the top right hand corner of the window.
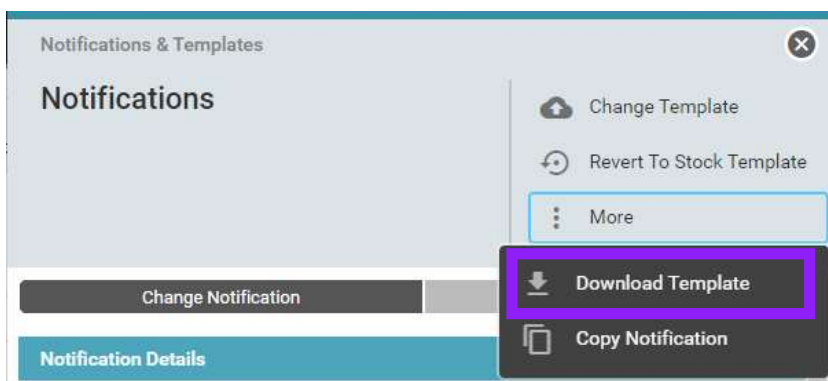
Use a text editor to make the changes required, and save.

```
*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.

Then navigate back to the notification window and choose 'Change Template'.

Here you can upload the file you have saved and this will update the template.

- The template can be seen in the 'Email Template' section of the Notification, and the 'Subject' of the email can be manually altered here too.

Change Notification | Manage Org Unit Restriction

Preview

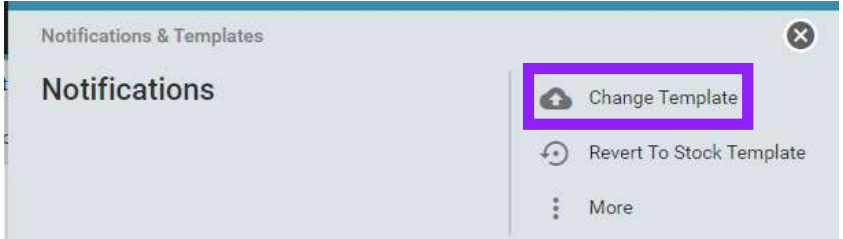**Email Template**

Name
LeaveRequestSubmitted.txt

Subject
HealthRoster Leave Request Submitted
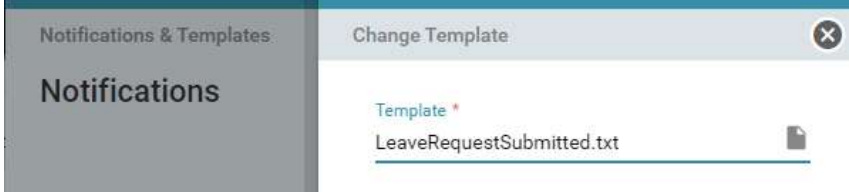
Preview

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

Select the 'Preview' option below the 'Body' section:

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

This will display what it would look like a new window, when sent to the recipient:

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
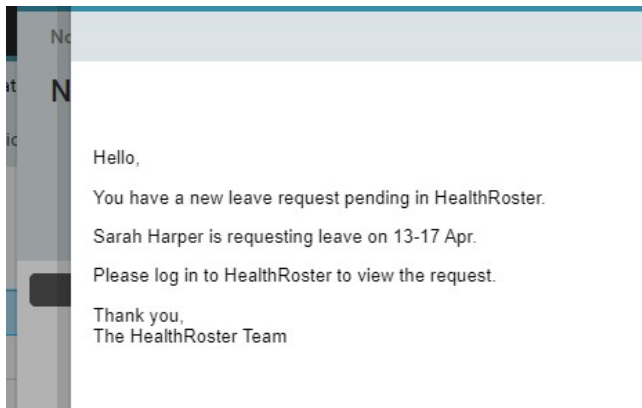
- The 'Manage Org Unit Restriction' tab is also a useful place to consider with your notifications. Here you can specify which units this notification will trigger for. If blank it will send to all units, if a unit is assigned, it will only send to that one unit.

This can be set up by choosing the Assign Units option, which will take you to a new window. Simply move the necessary units to the 'Assigned' side:
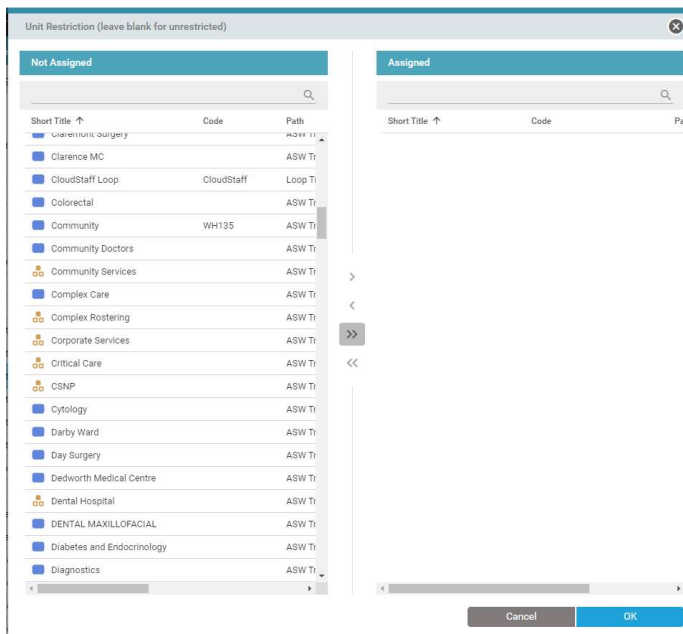
2. Unavailability Notifications

There are a few different notifications that you will need to ensure are set up correctly for smooth workings of your annual leave requesting and approval process. The key ones that you need to consider are the notifications that the managers receive when a request has been made, and then the notifications to the employees when these have been approved or rejected.

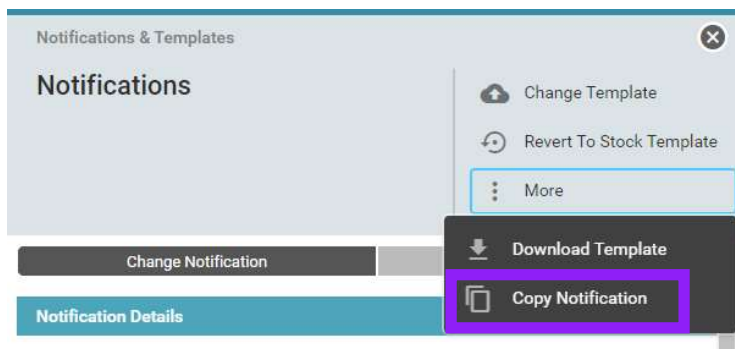- **Unavailability Request Submitted**

This is sent to the set recipient when an employee requests an unavailability. It is important to note though, that while this notification will only send to the notification recipient, anyone with the feature access *Unavailability Actions: Approve and Reject*, and the visible unit, will be able to approve or reject the annual leave requests. The choice of whether to have this set as the Team Manager or the First/Second Approver is the choice of the unit or organisation, in line with your internal policies.

Note
As it is, this can only be set for one recipient, if you require this to send to be multiple recipients, you may need to create a second notification. You can do this by choosing the Copy Notification option in the top right hand corner of the notification window or by right clicking the notification and choosing Copy Notification.

- **Unavailability Request Approved**

This is sent when an unavailability request is approved by the manager. It is sent to the employee who requested the unavailability. This will trigger when a user with the appropriate feature access, right clicks on the annual leave request and selects Approve Request. It is common that the recipient for this one is Employee, so that the staff member can receive a notification that their leave is approved.

- **Unavailability Request Rejected**

This is sent when an unavailability request is rejected by the manager. It is sent to the employee who requested the unavailability. This will trigger when a user with the appropriate feature access right clicks on the annual leave request and selects Reject Request. It is common that the recipient for this one is Employee, so that the staff member can receive a notification that their leave is rejected.

- **Cancelled Approved Unavailability Request**

This is sent when an employee cancels an approved unavailability request, and is usually sent to the employee's manager/approver. This will trigger when the employee chooses the red bin icon in Employee Online to cancel the period of leave. The choice of recipient is to be decided by the organisation in line with the leave policies.

Note
While this functionality exists, the ability for employees to cancel aproval unavailabilties is dependant on the feature access *Employee Online: Can Cancel Approved Unavailabilities* and you will need to consider carefully whether you would like employees to have this access in line with internal policies.

3. Notification Log

A really useful tool in the system to track the notifications that have been sent is the Notification Log in Admin>Logs>Notification Log and Admin>Logs> SMS Notification Log. In this log you can see when a notification was sent, who triggered the notification and what type of notification it was. It is useful for seeing whether a notification has successfully sent or not, and can be useful for triaging notification issues. You will require the feature accesses *Ref Data Actions: Notifications* and *Ref Data Tools: Notifications* for the email notification logs, and *Ref Data Tools: SMS Notification Log* for the SMS log.

Supporting Documentation

- HealthRoster 11 – Notifications Feature Guide.pdf

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

Chicago
RLDatix Head Office

311 South Wacker Drive,
Suite 4900
Chicago, Illinois United States
60606
Tel. +1 312 505-9301

Toronto

1 Yonge Street
Suite 2300
Toronto, Ontario, Canada
M5E 1E5
Tel. +1 416 410-8456

Melbourne

Suite 4, Level 4
441 St Kilda Road
Melbourne VIC 3004
Tel. +61 (0)3 9534 4477

Richmond
European Head office

1 Church Road
Richmond, Greater London
TW9 2QE
UK
Tel. +44 (0)20 7355 5555

Stockholm

Box 30077
104 25 Stockholm
Visiting address:
Sankt Eriksgatan 46
112 34 Stockholm
Tel. +46 (0)8 50551800

Frankfurt

Taunusanlage 8
60329 Frankfurt Am Main
Germany
Tel. +49 (0)69 247411440

Riyhad

7487 Khalid Ibn Al Walid
Qurtubah, Riyadh
Riyadh 13245 2218
Kingdom of Saudi Arabia.

For full list of regional offices visit our website

RLDATIX