


## Article Summary

Leave Calendar Management for HR Leave Calendar Administrators and calendar owners.

# Create a new Departmental Leave Calendar

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## Step 1: Create the Calendar (HR-only)

1. Login to the IT Helpdesk system at [helpdesk.ok.ubc.ca](http://helpdesk.ok.ubc.ca)
2. In the left-hand menu, choose **Calendars**<sup>[1]</sup>
3. Click the small green  above the list of available calendars.
4. Enter the **Name** of the calendar
  1. The Name should indicate the department and what the calendar will be used for, i.e. "IT – Leave". This will help eliminate confusion for the HR Leave Calendar Administrator with access to *multiple* Leave calendars.
5. Select the **Department** that the calendar is applicable to.
6. Enter the **Description** of the calendar.
  1. You may want to indicate what the Calendar will be used for, and what events are included.
7. Click Save

## Step 2: Assign Permissions

Now that you have created a new calendar for a department, you need to assign permissions. Assigning permissions will enable individual members of that department to view and/or enter their own events, or enable department administrators to enter events on behalf of others.

The defined permission set-up for a departmental Leave calendar is:

- All members of the department can view their own individual events.
- Designated departmental calendar administrator can create events for any member of the department, or any contact that has explicitly been added to the calendar.
- A designated HR Leave Calendar Administrator has full access to the calendar.

## Add Permissions for Individual Department Members

1. Click the **Permissions** tab
2. Click the **Add New** link

<a href="#">Details</a>	<a href="#">Permissions</a>	<a href="#">Excluded Events</a>	<a href="#">Approvers</a>	<a href="#">Notes</a>	<a href="#">Calendar Events</a>	<a href="#">Add New</a>
No permissions have been assigned to this calendar.						

3. Under the **Category** dropdown, select Department
4. Under the **Department** dropdown, select the Department
5. Under the **Access Level** dropdown, select Level I
6. Under the **Hide Contact** dropdown, ensure that No is selected. This will allow the Calendar Administrator for this department to assign events to all members of the department.
7. Click **Save**

## Exception – Add permission for contact outside of department

If an individual should be included in this calendar, but they are not a member of the department selected above, follow the steps below:

1. Under the **Permissions** tab, click the **Add New** link
2. Under the **Category** dropdown, ensure that Contact is selected
3. Under the **Contact** dropdown, select the name of the contact
4. Under the **Access Level** dropdown, select Level I
5. Under the **Hide Contact** dropdown, ensure that No is selected. This will allow the Calendar Administrator for this department to assign events to this contact.
6. Click Save

## Exception – Remove department member from calendar

If a contact that is part of the department for a Leave Calendar should *not* be included in the calendar for any reason, follow the steps below:

1. Under the **Permissions** tab, click the **Add New** link
2. Under the **Category** dropdown, ensure that Contact is selected
3. Under the **Contact** dropdown, select the name of the contact
4. Under the **Access Level** dropdown, select Deny
5. Under the **Hide Contact** dropdown, select Yes. This will ensure that no events can be assigned to the contact for this calendar.
6. Click Save

## Add Permissions for Departmental Calendar Administrator(s)

1. Under the **Permissions** tab, click the **Add New** link
2. Under the **Category** dropdown, ensure that Contact is selected
3. Under the **Contact** dropdown, select the name of the departmental calendar administrator
4. Under the **Access Level** dropdown, select Level IV
5. Under the **Hide Contact** dropdown, select Yes or No.
  - a. Select Yes if this contact has been added to another calendar, i.e. if someone from another department is reporting their leave.
  - b. Select No if events will be assigned to this contact under this calendar.
6. Click Save

*Repeat the above as necessary for each departmental calendar administrator.*

## Add Permissions for HR Leave Calendar Administrator

1. Under the **Permissions** tab, click the **Add New** link
2. Under the **Category** dropdown, ensure the Contact is selected
3. Under the **Contact** dropdown, select the name of the HR Leave Calendar Administrator
4. Under the **Access Level** dropdown, select Level V
5. Under the **Hide Contact** dropdown, select Yes. This will ensure that no events can be assigned to the HR Leave Calendar Administrator for this calendar.
  - a. The only instance where this will be No is for calendar assigned to the department that the HR Leave Calendar Administrator is a part of, i.e. the Human Resources leave calendar.
6. Click Save

## Step 3: Set-up Calendar Events

This step allows you to configure which Event Types will be *excluded* from the calendar.

The defined events *included* in each departmental Leave calendar are:

- BCGEU - Paid Leave (BGPAID) \*
- Bereavement (BR) \*
- Christmas Leave (CHR) \*
- Compassionate Leave (COMP) \*
- Deferred Salary Leave (DEFSAL) \*
- Education Leave (ED) \*
- Exchange Leave (XCH) \*
- Fire Fighting (FIRE) \*
- Jury Duty/Court Duties (JRY) \*
- Leave for Union Officers (UNOF) \*
- Leave in Special Circumstances (SPCI) \*
- Leave Requested by University (UNI) \*
- Leave Without Pay (LWOP) \*
- Maternity Leave (MATLV) \*
- Medical Appointment
- Parental Leave (PARLV) \*
- Part-time Retirement Leave (PTRET) \*
- Political Activity (POLI) \*
- Sabbatical Leave (SABB) \*
- Sick Leave (S) \*
- Sick Leave (Family) (F) \*
- Sick Leave - Ill (ILL) \*
- Special Leave (SPLV) \*
- Study Leave (STDY) \*

- Time Off in Lieu \*
- Vacation Leave (V) (Optional)
- Worksafe BC (WCB) \*

\* Restricted event. Only calendar owner and/or permitted users can add events of this type.

1. Click the **Excluded Events** tab
2. Under the **Campus-wide Event** heading, click the **Select All**<sup>[2]</sup> link
3. Under the **Department Event** heading, click the **Select All**<sup>[3]</sup> link
4. Under the **Individual Event**<sup>[4]</sup> heading, check all events *except* those listed above.
  1. As these are 'excluded events', you want to check all events that should *not* be available in the calendar.
5. Click **Save**

## Step 4: Assign Event Approvers as Required

You may want to have the departmental calendar administrator (or other individual) approve certain events after they've been added to the calendar by an individual department member. Events with one or more assigned approver(s) are marked as 'pending' until the approval has been given.

1. Click the **Approvers** tab
2. Click the **Edit** link for the Event Type you'd like to add an Approver for
3. Under the **Add Approver** dropdown, select the name of the Approver<sup>[5]</sup>
4. Click **Add**

*Repeat steps 3 and 4 as necessary. Note that if multiple approvers are specified, approval for that event type is required from only one of the selected approvers.*

*To remove an approver, click the 'Remove' link to the left of the approver name.*

NOTE: All event types marked with a \* under the Excluded Events tab are 'Restricted Events', meaning only the Calendar owner and/or permitted users (Access Level IV or V) can add events of this type. For this reason, approval may not be required for restricted events.



Also, as individual department members are granted Level I access to the calendar (meaning they can only view their own individual events), approval may not be required.

5. To return to the calendar details, click the calendar name at the top of the screen.

## Step 5: Verify Calendar Creation (HR-only)

1. In the left-hand menu, choose **Calendars**<sup>[6]</sup>
2. The calendar name (specified in Step 1) should appear in the list of available calendars.

## Step 6: Add Permissions to Calendars and Leave Report (HR-only)

The next step is to add permissions for Departmental Leave Calendar Administrators to the 'Leave Calendar Administrators' group. This group gives its members access to the Calendars and Reports left-hand navigation options, as well as the Leave Report.



NOTE: All members of the "IT, Media & Classroom Services" group also have access to the Leave Report by default.

1. In the left-hand menu, choose **Administration**
2. Under the Groups tab, click Leave Calendar Administrator group
3. Click the Members tab
4. In the Add Member drop-down box, choose the contact you'd like to add
5. Click the Add button

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*HR Leave related questions*

[1] If you do not see a 'Calendars' link in the left-hand menu or are unable to access any of the options listed above, please enter a work request

to have access set-up.

[2] This *excludes* all campus-wide events from the calendar.

[3] This *excludes* all departmental events from the calendar.

[4] Individual Events are events that pertain to a single individual only.

[5] Only calendar owner and permitted users (Access Level IV or V) will appear in the dropdown.

[6] If you do not see a 'Calendars' link in the left-hand menu or are unable to access any of the options listed above, please enter a work request to have access set-up.

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Online URL: <https://knowit.ok.ubc.ca/article/hr-leave-calendar-administration-159.html>