



# HR Selfservice Ready for 2024

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# Introduction.

Preparing the year 2024 in HR Selfservice Absences takes 3 easy steps

## **Step 1: Update the bank holidays / annual planning for 2024**

In this step you will define the bank holidays and other collective absences for 2024

## **Step 2: assign leave rights for 2024**

In this step you will assign the correct leave entitlements for every employee.

## **Step 3: Transfer remaining leave rights.**

In this step you can transfer – if necessary – remaining leave rights from 2023 to 2024.

Following pages will guide you through this process step by step.

# Step 1: Update the bank holidays/annual planning for 2024

If you use more than one annual planning (e.g. one for workers and one for management) you need to update these calendars individually.

## Annual planning for Payroll-employees

The annual planning of your Payroll employees is managed in Payroll and read by HR Selfservice Absences.

1. Log in to my.sdworx.com and open Payroll. Under the "Company" tab select "Public holidays" under "Planning".
2. Change the year at the top right from 2023 to 2024.
3. Register the updated information for holidays that you wish to replace. The holidays that can be taken up freely can be registered by ticking the heading "holidays to be taken up freely".
4. Activate one of the additional holidays, where applicable, by ticking the holiday in question. Review 3 once again for this holiday.
5. Click on save.
6. Do you have collective leave in your company?  
If so, select "Collective leave" under "Planning".
7. Click on the pencil next to the planning calendar.
8. Change the year at the top right from 2023 to 2024.
9. At the bottom of the screen, select each of the company closing days in the calendar view. Use the shortcuts below the calendar to issue an absence for a company closing day. Click on "other" if no shortcut is available for the company closing day in question.
10. Click on save.
11. Do you have several planning calendars?  
If so, repeat steps 7 through 10 for each of your planning calendars.
12. Open HR Selfservice Absences . Your new annual planning will be imported in HR Selfservice Absences.

## Annual planning for external employees.

The annual planning of employees (contractors, consultants...) that are not managed in Payroll needs to be updated in HR Selfservice Absences.

1. Choose Organisation > Calendars > Annual planning.
2. Choose the planning you wish to update and choose 2024.

Year  Name



When there is no calendar available for 2024, you can add a new one by clicking the + button. Keep in mind that this calendar needs to be linked to the work schedules. You can do this by going to Organisation > Calendars > Work schedules. An empty calendar for 2024 is shown.

3. An empty calendar for 2024 is shown
4. Choose on the day you wish to add and click "Add absences".

Add absences		Remove absences		Clear selection		<input type="checkbox"/> Select Period?																											
2015	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Jan																																	
Feb																																	
Mar																																	
Apr																																	
May																																	
Jun																																	
Jul																																	
Aug																																	
Sep																																	
Oct																																	
Nov																																	
Dec																																	

5. Choose the type of absence you wish to add and click "Save"

**Add new day**  
Pick the type you would like to add

Payroll code



Repeat these steps for every calendar you wish to update.

## Step 2: Assigning leave rights for 2024.

**Attention:** only assign the holidays that the employees **can choose freely**. Holidays that have been fixed in the annuals planning may not be assigned.

An example.

An employee is entitled to 20 statutory holidays. However, your company closes between Christmas and New Year and you have already fixed 5 statutory holidays in order to cover that week. In this case you should only assign 15 statutory holidays to the employee instead of 20.

There are two methods for doing this:

### **Method 1: individually for each employee.**

This method allows you to individually assign leave rights for every employee.

We recommend this method when working with a limited number of employees or when most employees have different leave entitlements.

### **Method 2: grouped with a leave rights set.**

This method assigns a number of predefined leave rights to a number of employees in one go. Specific cases can still be edited individually per employee.

We recommend this method when working with a larger group of employees and when most employees have the same leave entitlement.

### **Method 3: copy existing leave rights to next year.**

Use this method when (most of) your employees have the same leave rights as previous year.

**Tip.** For employees with an irregular work schedule (Monday 3 hours, Tuesday 7 hours, Wednesday 4 hours...) it is better to assign leave rights in hours than in days.

## Method 1: Assign individually for each employee.

1. Go to “Employees” > “Personal data” > “Leave rights.”
2. Choose the year 2024 in the top right corner.

Choose year

Type of leave	From	Till	Starting balance	Correction	Remaining
<input type="button" value="Add leave right"/>					

Leave rights assigned in days will be rounded to half days.  
For leave rights in hours, please use the decimal notation (15 min = 0.25 hours)

3. Click “Add leave right”
4. Assign the leave rights.
5. Click “Save”

## Method 2: Assign leave rights to multiple employees.

With this method you can assign one or more leave rights to certain groups of employees.

1. Go to Organisation > Calendars > Bulk edits
2. Choose “Assign leave rights”
3. Choose the year for which you want to assign leave rights.

### Assign leave rights to multiple employees for the year

4. Add one or more leave rights.

Type of leave	From	Till	Starting balance	
<input type="text" value="Statutory holidays (days)"/>	<input type="text" value="01/01/2017"/>	<input type="text" value="31/12/2017"/>	<input type="text" value="20"/> days	<input type="button" value="🗑️"/>
<input type="text" value="Leave to comp for the shorter working week (days)"/>	<input type="text" value="01/01/2017"/>	<input type="text" value="31/12/2017"/>	<input type="text" value="12"/> days	<input type="button" value="🗑️"/>

5. Click “Next step”
6. Select the employees to whom you want to assign the selected leave rights by adding them from the left table to the right table. Use the “>” icon.

Employees				Selected employees			
<input type="text" value="Q adm"/>				<input type="text" value="Q Search ..."/>			
<input type="checkbox"/>	Name	Department	Work plan	<input type="checkbox"/>	Name	Department	Work plan
<input type="checkbox"/>	Maes Julie	Administration	Full time 40h	<input type="checkbox"/>	Bonte Rita	Administration	Full time 40h
<input type="checkbox"/>	Rousseaux Jasper	Administration	-	<input type="checkbox"/>	Devolder An	Administration	Full time 40h
<input type="checkbox"/>	Vandepitte Niels	Administration	Zomerschema				
<input type="checkbox"/>	Vantomme Lieve	Administration	Part time 32h Fr				
<input checked="" type="checkbox"/>	Vergauwen Mark	Administration	Part time 32h Fr				

7. Click “Next step”
8. Decide what needs to happen if an employee already has the leave right you want to assign.

### 3 What if the leave right already exists in 2018?

- Add new leave rights to existing leave rights.
- Replace existing leave right with new leave rights.

9. Click “Save”

✓ Leave rights have been successfully assigned to the selected employees

### Method 3: Copy existing leave rights to next year for multiple employees.

With this method you can copy the existing leave rights from one year to another for selected groups of employees.

- Go to Organisation > Calendars > Bulk edits
- Choose “Copy leave rights”
- Choose the years between which you want to copy leave rights.

**Copy leave rights from 2017 to 2018 for multiple employees.**

- Select the employees for who you want to copy the selected leave rights by adding them from the left table to the right table. Use the “>” icon.

Employees

<input type="checkbox"/>	Name ^	Department ⇅	Work plan ⇅
<input type="checkbox"/>	Maes Julie	Administration	Full time 40h
<input type="checkbox"/>	Rousseaux Jasper	Administration	-
<input type="checkbox"/>	Vandepitte Niels	Administration	Zomerschema
<input type="checkbox"/>	Vantomme Lieve	Administration	Part time 32h Fr
<input checked="" type="checkbox"/>	Vergauwen Mark	Administration	Part time 32h Fr

Selected employees

<input type="checkbox"/>	Name ^	Department ⇅	Work plan ⇅
<input type="checkbox"/>	Bonte Rita	Administration	Full time 40h
<input type="checkbox"/>	Devolder An	Administration	Full time 40h

> <

- Click “Next step”
- Select the leave rights that need to be copied.  
By default all leave rights that have been found in 2023 for the selected employees will be displayed. Remove the leave rights you do not want to copy by using the Trash icon.  
Leave rights will only be copied if an employees had the leave rights in the selected year.
- Click “Next step”
- Decide what needs to happen if an employee already has the leave right you want to assign.

### 3 What if the leave right already exists in 2018?

- Add new leave rights to existing leave rights.
- Replace existing leave right with new leave rights.



9. Click "Save"

✓ Leave rights have been successfully assigned to the selected employees

## Step 3: Transferring leave balances to next year.

1. Go to Organisation > Calendars > Bulk edits.
2. Choose "Transfer leave rights"

Transfer leave rights from **2017** to **2018**

3. Select the leave right you want to transfer and the counter under which these leave rights will be available in the new year.  
Choose the maximum number of days (or hours) that can be transferred.  
Choose the date until which the leave can be taken.

From	to	Maximum transferable	Valid until
Statutory holidays (days)	Holidays previous year	5 days	31/3/2018

Add leave right

4. Click "Next Step"
5. Select the employees for who you want to transfer the selected leave rights by adding them from the left table to the right table. Use the ">" icon.

Employees				Selected employees			
Q adm				Q Search ...			
<input type="checkbox"/>	Name	Department	Work plan	<input type="checkbox"/>	Name	Department	Work plan
<input type="checkbox"/>	Maes Julie	Administration	Full time 40h	<input type="checkbox"/>	Bonte Rita	Administration	Full time 40h
<input type="checkbox"/>	Rousseaux Jasper	Administration	-	<input type="checkbox"/>	Devolder An	Administration	Full time 40h
<input type="checkbox"/>	Vandepitte Niels	Administration	Zomerschema				
<input type="checkbox"/>	Vantomme Lieve	Administration	Part time 32h Fr				
<input checked="" type="checkbox"/>	Vergauwen Mark	Administration	Part time 32h Fr				

6. Click "Next step".
7. Decide what needs to happen if an employee already has the leave right you want to transfer.

### 3 What if the leave right already exists in 2018?

- Add new leave rights to existing leave rights.
- Replace existing leave right with new leave rights.

8. Click "Save"

✓ Leave rights have been successfully assigned to the selected employees