

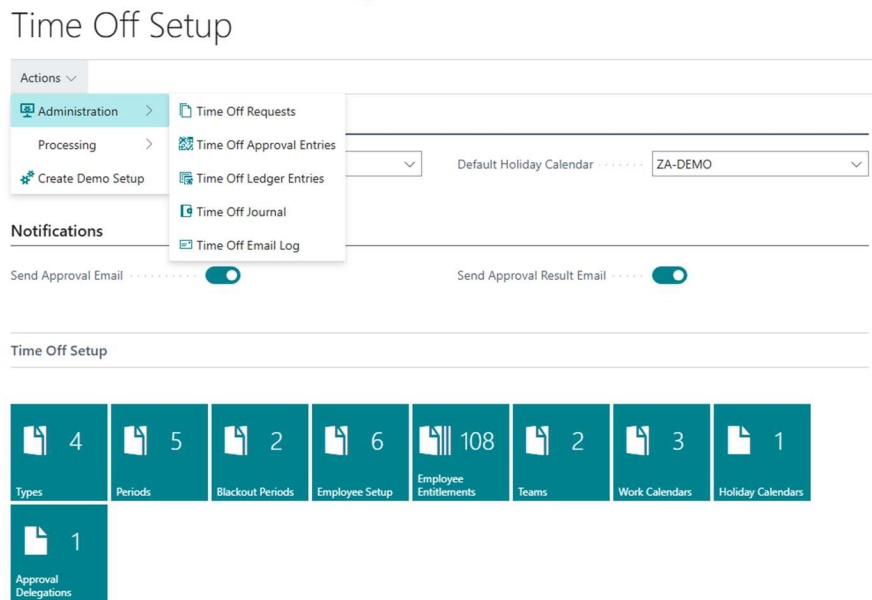


Time Off Management

Administrator & Setup Manual

A scenario-driven guide to configuring Time Off Management for Microsoft Dynamics 365 Business Central. This revision is based on the current stable application source and the supplied application screenshots. It intentionally documents only configuration and behavior that exists in the current product.

Publisher: Binary Lab (Pty) Ltd



Time Off Setup provides the central administration and processing entry point.



1. How to use this manual

Time Off Management is designed to support different time-off policies in the same Business Central company. The quickest way to configure it is to identify the scenario that most closely matches each policy in your organization, then combine the relevant setup areas.

If your policy sounds like...	Start with...
Employees receive a fixed allowance for a defined period	Time Off Type + Time Off Period + Employee Entitlement
Employees earn entitlement weekly or monthly	Time Off Type earning frequency + Employee Entitlement + processing
Entitlement is granted annually	Annual earning frequency + Employee Entitlement + processing
Entitlement follows the employment anniversary	Anniversary earning frequency + Employee Entitlement + employee Employment Date
Entitlement operates over a multi-year employment cycle	Cycle earning frequency + cycle fields + Employee Entitlement
Unused days may move into the next period	Carry Forward + Max Carry Forward Days
Different employees work different days/hours	Work Calendars + Employee Time Off Setup
Public holidays differ by employee/location	Holiday Calendars + Employee Time Off Setup
Requests need a manager, team manager or temporary delegate	Employee/Team approval setup + Approval Delegations
Certain dates need staffing controls	Time Off Teams + Blackout Periods
Approved time off must also appear in standard BC Employee Absence	Post to Employee Absence + Cause of Absence Code

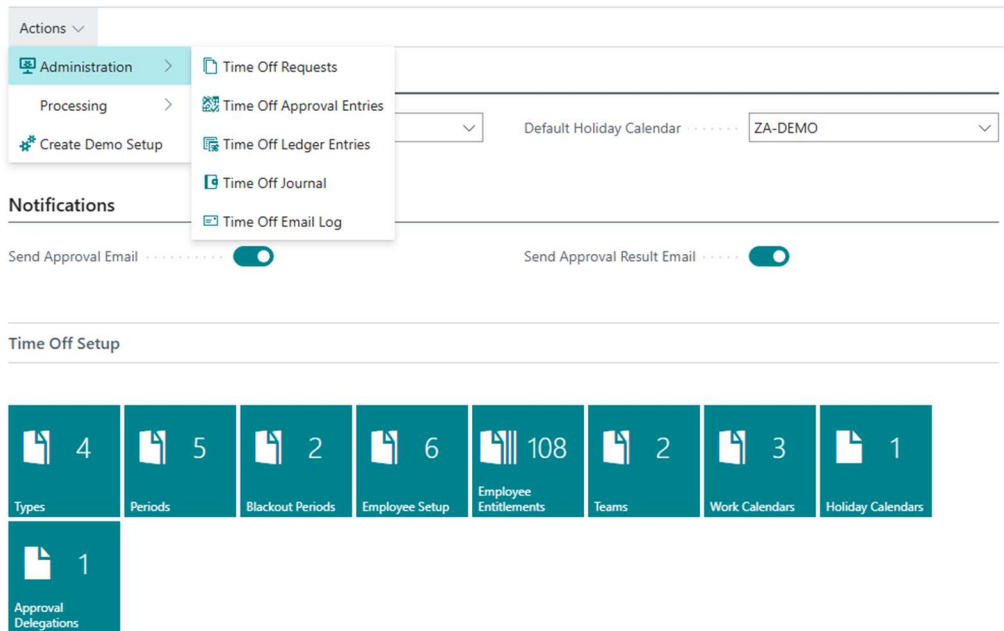
These models can coexist. For example, Annual Leave can earn monthly and allow carry-forward, Sick Leave can use a multi-year cycle, Family Responsibility Leave can earn annually, and Unpaid Leave can have no entitlement earning.

2. Foundation setup

Time Off Setup contains the company-level defaults and notification controls. Default calendars are used when an employee does not have an employee-specific calendar assigned.



Time Off Setup



Actions ▾

- Administration >
 - Time Off Requests
 - Time Off Approval Entries
 - Time Off Ledger Entries
 - Time Off Journal
 - Time Off Email Log
- Processing >
- Create Demo Setup

Notifications

Send Approval Email ☒ Send Approval Result Email ☒

Default Holiday Calendar ▾ ZA-DEMO ▾

Time Off Setup

Types 4	Periods 5	Blackout Periods 2	Employee Setup 6	Employee Entitlements 108	Teams 2	Work Calendars 3	Holiday Calendars 1
Approval Delegations 1							

Relevant Time Off Setup fields: default calendars and notification controls.

Default calendars

- Default Work Calendar: fallback working pattern used when Employee Time Off Setup does not specify a Work Calendar Code.
- Default Holiday Calendar: fallback holiday calendar used when Employee Time Off Setup does not specify a Holiday Calendar Code.

Notifications

- Send Approval Email: sends an email to the resolved approver when approval is required.
- Send Approval Result Email: sends the employee the result when a request is approved, rejected or sent back.

The Administration group also provides access to Time Off Requests, Approval Entries, Ledger Entries, the Time Off Journal and the Email Log. Process Time Off runs the earning and expiry processing described later in this manual.

3. Working patterns and holidays

The calendar configuration determines which dates are workable and how many working hours apply. This matters to request calculations and to cycle policies that count workable days.

Scenario A - Standard office employees

Create a work calendar with the normal hours for Monday to Friday and zero hours for non-working weekend days. Assign it as the default if it applies to most employees.



Code ↑	Description	Manager Employee No.	Minimum Available	Staffing Action
→ SALES	Demo Sales Team	DEMO001	2	Warning
WAREHOUSE	Demo Warehouse Team	DEMO004	1	Block

Work Calendars store normal working hours for each day of the week.

Scenario B - Weekend or alternative working patterns

Create a separate work calendar and enter hours on the days that are genuinely worked. Assign that calendar to the relevant employees in Employee Time Off Setup. The application can therefore treat Saturday or Sunday as workable where the employee's pattern requires it.

Scenario C - Different public holiday groups

Create separate Holiday Calendars for regions or employee groups. Maintain the dates through the Holidays action and assign the appropriate calendar to each employee. A holiday record also has a Working flag, allowing a maintained holiday date to be treated as working where required.

Code ↑	Description	Monday Hours	Tuesday Hours	Wednesday Hours	Thursday Hours	Friday Hours	Saturday Hours
→ MON-FRI	Monday to Friday - 8 hours p...	8.00	8.00	8.00	8.00	8.00	0.00
TUE-SAT	Tuesday to Saturday - 8 hours...	0.00	8.00	8.00	8.00	8.00	8.00
WED-SUN	Wednesday to Sunday - 8 hou...	0.00	0.00	8.00	8.00	8.00	8.00

Holiday Calendars group the holiday dates that apply to an employee or population.

4. Time Off Types - defining the policy

A Time Off Type defines the core policy. The current setup page exposes the fields shown below; the scenarios in this manual use only these available controls.



+ New Edit List Delete															Filter View List		
Description	Active	Entitle... Days	Earning Frequency	Cycle Length (Years)	Initial Accrual Months	Work Days per Accrual Day	Cause of Absence Code	Post to Employee Absence	Approval Required	Require Reason	Require Attachment	Carry For...	Max Carry Forward Days	Allow Negative Balance			
Annual Leave	☒	21	Monthly	0	0	0	HOLIDAY	☒	☒	☐	☐	☒	5.00	☐			
Family Responsibility Le...	☒	3	Annual	0	0	0	DAYOFF	☒	☒	☒	☐	☐	0.00	☐			
Sick Leave	☒	30	Cycle	3	6	26	SICK	☒	☒	☒	☒	☐	0.00	☐			
Unpaid Leave	☒	0	None	0	0	0	DAYOFF	☒	☒	☒	☐	☐	0.00	☒			

Time Off Types: the policy fields available in the current application.

Field	How it changes the policy
Entitlement Days	Standard entitlement amount used by the configured earning model.
Earning Frequency	None, Weekly, Monthly, Annual, Anniversary or Cycle.
Cycle Length (Years)	Length of an employment-based cycle; enabled for Cycle.
Initial Accrual Months	Initial progressive earning period for Cycle.
Work Days per Accrual Day	Workable days required to earn one day during the initial cycle accrual period.
Approval Required	Controls whether a request needs an approval route.
Require Reason	Requires a reason before submission.
Require Attachment	Requires at least one attachment before submission.
Carry Forward	Allows unused balance to be retained into the next Time Off Period.
Max Carry Forward Days	Caps the amount retained when Carry Forward is enabled.
Allow Negative Balance	Allows requests that would take the available balance below zero.
Post to Employee Absence	Also records approved/taken time off in standard Business Central Employee Absence.
Cause of Absence Code	Standard BC cause used for Employee Absence posting.

5. Entitlement and earning scenarios

5.1 Fixed entitlement - Earning Frequency = None

Use None where the entitlement is not generated by the earning processor. Maintain the employee's Time Off Entitlement for the relevant Time Off Period. This is useful where HR establishes the allowance directly rather than earning it weekly, monthly, annually or by anniversary.



5.2 Weekly or monthly earning

Use Weekly or Monthly when employees build entitlement progressively. Create the employee entitlement and let Process Time Off post due Time Earned entries. If Override Earning is selected on the employee entitlement, Days Earned provides the employee-specific earning amount; otherwise the standard type/entitlement configuration is used.

5.3 Annual earning

Use Annual when entitlement is earned on the annual processing basis. This differs from a manual fixed entitlement because the earning processor creates the earning entry when it becomes due.

5.4 Anniversary earning

Use Anniversary when earning is tied to the employee's Employment Date rather than only to a common company period boundary. Ensure Employment Date is populated on the Business Central Employee record.

Employee No. ↑	Time Off Type Code ↑	Time Off Period Code ↑	Entitlement Days	Opening Days	Override Earning	Days Earned
→ DEMO001	ANNUAL	2023	21.00	0.00	☐	0.00
DEMO001	ANNUAL	2024	21.00	0.00	☐	0.00
DEMO001	ANNUAL	2025	21.00	0.00	☐	0.00
DEMO001	ANNUAL	2026	21.00	15.00	☐	0.00
DEMO001	ANNUAL	2027	21.00	0.00	☐	0.00
DEMO001	FAMILY	2023	3.00	0.00	☐	0.00
DEMO001	FAMILY	2024	3.00	0.00	☐	0.00
DEMO001	FAMILY	2025	3.00	0.00	☐	0.00
DEMO001	FAMILY	2026	3.00	0.00	☐	0.00
DEMO001	FAMILY	2027	3.00	0.00	☐	0.00
DEMO001	SICK	2023	30.00	0.00	☐	0.00
DEMO001	SICK	2024	30.00	0.00	☐	0.00
DEMO001	SICK	2025	30.00	0.00	☐	0.00
DEMO001	SICK	2026	30.00	0.00	☐	0.00
DEMO001	SICK	2027	30.00	0.00	☐	0.00
DEMO001	UNPAID	2023	0.00	0.00	☐	0.00
DEMO001	UNPAID	2024	0.00	0.00	☐	0.00
DEMO001	UNPAID	2025	0.00	0.00	☐	0.00
DEMO001	UNPAID	2026	0.00	0.00	☐	0.00
DEMO001	UNPAID	2027	0.00	0.00	☐	0.00
DEMO002	ANNUAL	2023	21.00	0.00	☐	0.00
DEMO002	ANNUAL	2024	21.00	0.00	☐	0.00
DEMO002	ANNUAL	2025	21.00	0.00	☐	0.00

Employee Time Off Entitlements connect an employee, Time Off Type and Time Off Period.

Opening Days can establish an opening balance. Override Earning and Days Earned are relevant only to earning types supported by the entitlement validation rules.

6. Multi-year cycle scenario

Cycle is intended for employment-based policies whose entitlement spans more than one annual Time Off Period. The cycle is anchored to the employee's Employment Date and uses Cycle Length (Years).

Worked example - 3-year sick leave cycle

The supplied demo setup illustrates a Sick Leave policy with Entitlement Days = 30, Earning Frequency = Cycle, Cycle Length = 3 years, Initial Accrual Months = 6 and Work Days per Accrual Day = 26.

- From Employment Date, the initial accrual phase counts workable days using the employee's effective work and holiday calendars.
- During the initial accrual months, one day is earned for each configured number of workable days completed.
- At the end of the initial accrual phase, the processor posts the remaining portion required to bring the cycle entitlement to the configured Entitlement Days. The ledger description is "Remaining balance of cycle".
- The entitlement then remains part of that employment-based cycle even when annual Time Off Period boundaries are crossed.

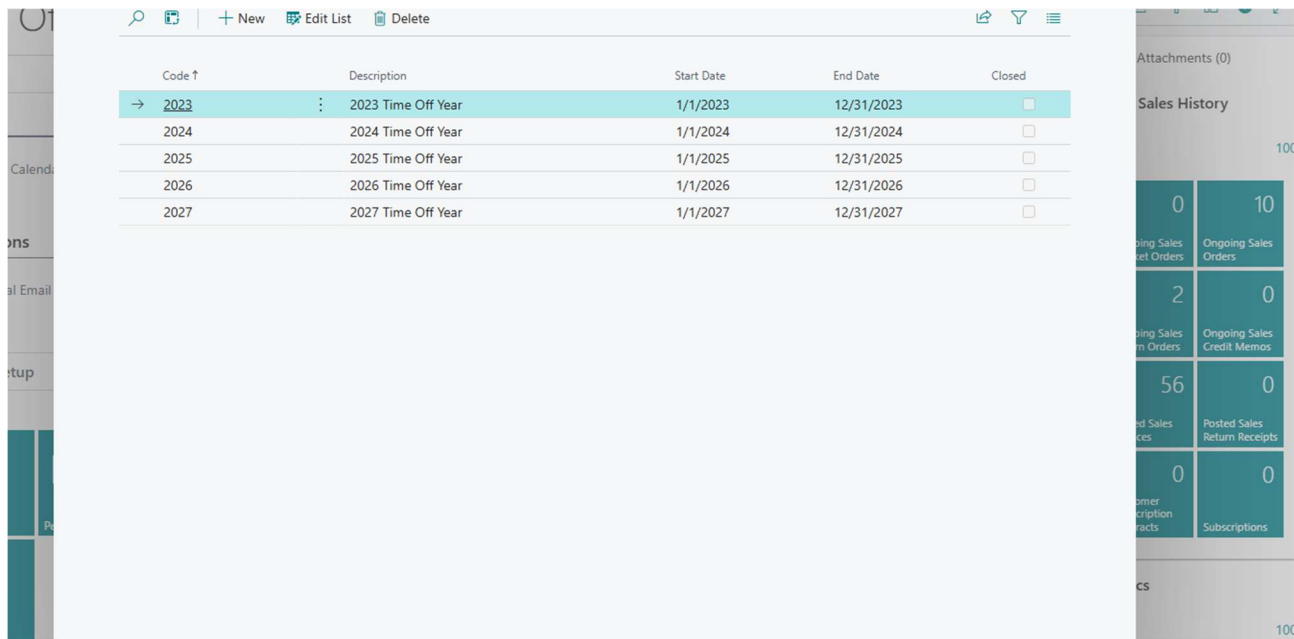


- At the next cycle boundary, the remaining cycle balance is expired and the new cycle entitlement is posted. Because workable days are calendar-driven, the actual initial earning dates can differ between employees with different work patterns or holiday calendars.

This is a configurable policy example. It should be matched to the organization's own employment policy and applicable legal requirements; the application does not itself define which statutory policy an organization must use.

7. Time Off Periods and carry-forward

Time Off Periods provide dated periods for entitlement and period-end processing. Each period has a Start Date, End Date and Closed status.



Code ↑	Description	Start Date	End Date	Closed
→ 2023	2023 Time Off Year	1/1/2023	12/31/2023	☐
2024	2024 Time Off Year	1/1/2024	12/31/2024	☐
2025	2025 Time Off Year	1/1/2025	12/31/2025	☐
2026	2026 Time Off Year	1/1/2026	12/31/2026	☐
2027	2027 Time Off Year	1/1/2027	12/31/2027	☐

Time Off Periods define the dated periods used by entitlements and period processing.

Scenario - retain only part of unused annual leave

Enable Carry Forward on the Time Off Type and enter Max Carry Forward Days. At period-end processing, unused balance above the permitted carry-forward amount is expired. If Carry Forward is not enabled, the type does not retain an annual carry-forward amount.

Cycle-based earning is processed on its employment-based cycle boundaries rather than being converted into an annual carry-forward model.

Closed Time Off Periods are not changed by normal Process Time Off processing.

8. Employee and team configuration

Employee Time Off Setup applies the organizational rules to an individual employee.



Approver Employee No.	Delegate Employee No.	From Date	To Date	Active
→ DEMO001	DEMO004	12/1/2026	12/15/2026	☒

Employee Time Off Setup links the employee to an approver, calendars and a team.

- Manager Employee No.: employee-level approver when configured.
- Work Calendar Code and Holiday Calendar Code: employee-specific overrides to the company defaults.
- Team Code: associates the employee with a Time Off Team for team management and staffing rules.
- Active: controls whether the employee setup is active.

Teams and staffing

A Time Off Team can have a Manager Employee No., Minimum Available and Staffing Action. Team members can also be marked Critical Employee. Use teams where availability needs to be evaluated as a group rather than only by individual balance.

Date	Description	Working
→ 1/1/2026	New Year's Day	☐
3/21/2026	Human Rights Day	☐
4/27/2026	Freedom Day	☐
5/1/2026	Workers' Day	☐
6/16/2026	Youth Day	☐
8/9/2026	National Women's Day	☐
9/24/2026	Heritage Day	☐
12/16/2026	Day of Reconciliation	☐
12/25/2026	Christmas Day	☐
12/26/2026	Day of Goodwill	☐
1/1/2027	New Year's Day	☐

Time Off Teams provide the organizational grouping used by team approval and staffing rules.

9. Approval scenarios and delegation

Scenario A - Employee-specific manager

Set Manager Employee No. on Employee Time Off Setup. When Approval Required is enabled for the Time Off Type, that manager is the primary approval route.

Scenario B - Team manager

If the employee does not have an employee-specific manager, the application can resolve the manager from the employee's Time Off Team.

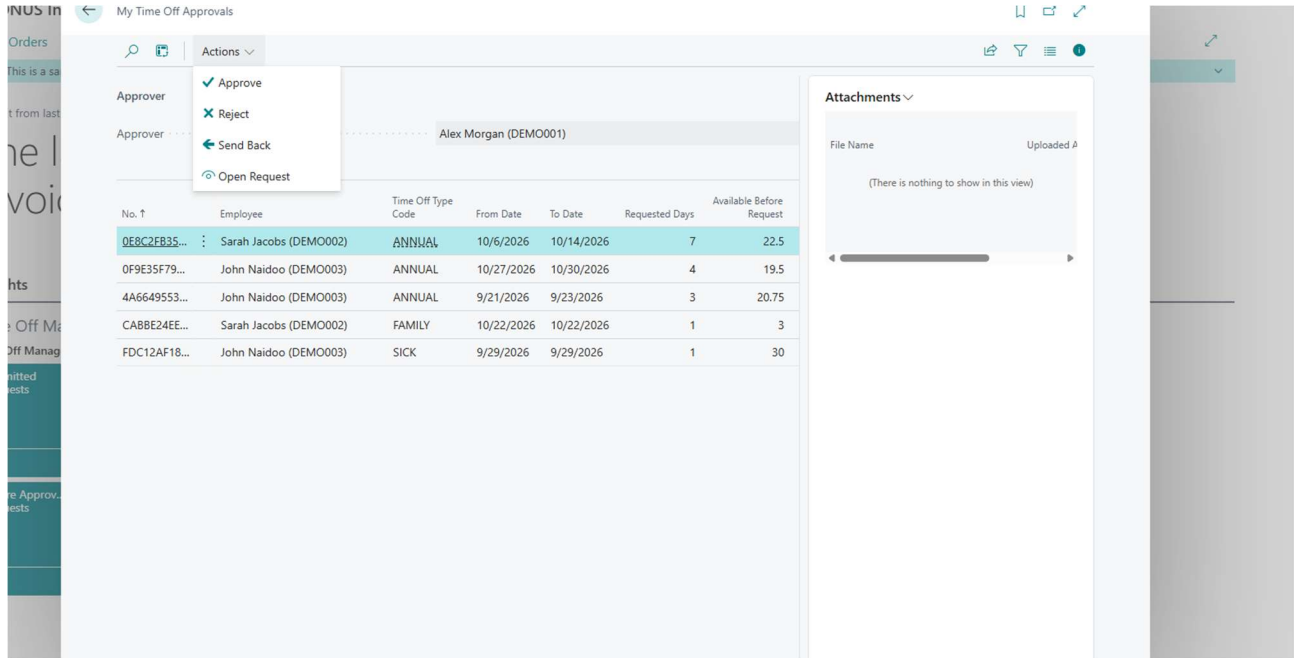


Scenario C - No approval route

If Approval Required is off, or no approval route can be resolved, submission is automatically approved. The application records an automatic approval entry when no approver is configured.

Scenario D - Temporary delegate

Approval Delegations allow an approver to nominate a Delegate Employee No. for a From Date/To Date range. Active delegation is considered when the request's approval route is resolved.



Approval pages provide the approver with the requests routed to them.

Send Approval Email and Send Approval Result Email in Time Off Setup control the corresponding email notifications. The Time Off Email Log provides an audit of attempts and errors.

10. Blackout periods and staffing controls

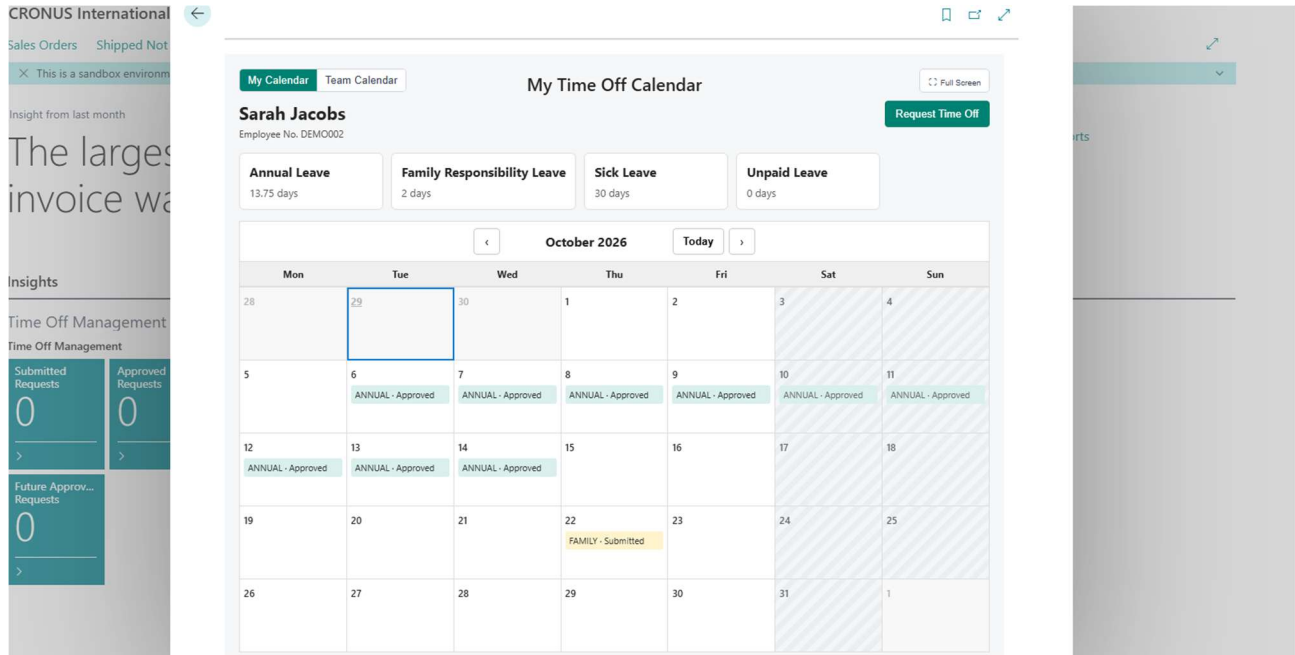
Blackout Periods can be defined for a date range and optionally restricted by Team Code and Time Off Type Code. Action uses the available Staffing Action values: Allow, Information, Warning and Block.

Action	Typical use
Allow	No restriction from the rule.
Information	Surface information without treating it as a warning or block.
Warning	Allow the process to continue while flagging the staffing concern.
Block	Prevent the affected request from proceeding.

A practical example is a retail peak period: define the date range, target the relevant store/team and Time Off Type where needed, then choose Warning or Block according to company policy. Team Minimum Available and Staffing Action provide the team-level availability policy.

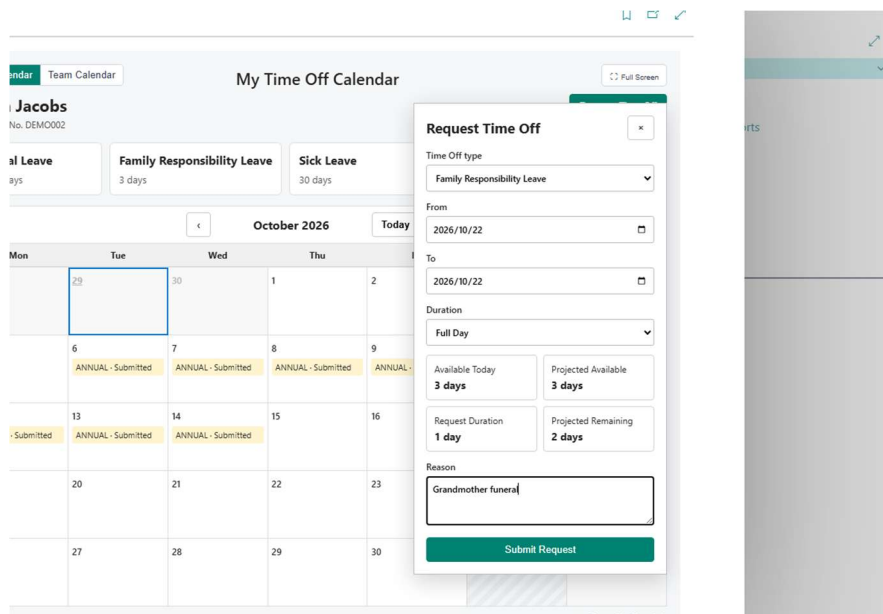
11. Employee request experience

Employees use My Time Off Calendar to see their time off and create requests. Workable and non-workable dates are derived from the effective calendars.



My Time Off Calendar gives the employee a calendar-based view of requests and availability.

Selecting a requestable date opens the request experience with the selected date as context. The request records the Time Off Type, date range, Duration Type, calculated days, reason where entered, balance before/after and status.



The request panel shows the fields relevant to creating and submitting the request.

Policy checks at submission

- Require Reason prevents submission without a reason.
- Require Attachment prevents submission without a supporting attachment.
- Allow Negative Balance determines whether a request may reduce the balance below zero.
- Approval Required determines whether the request follows the approval route or can be approved without it.

Request status supports Open, Submitted, Approved, Rejected, Cancelled and Returned. A returned request can therefore be corrected and resubmitted rather than being treated as a rejection.



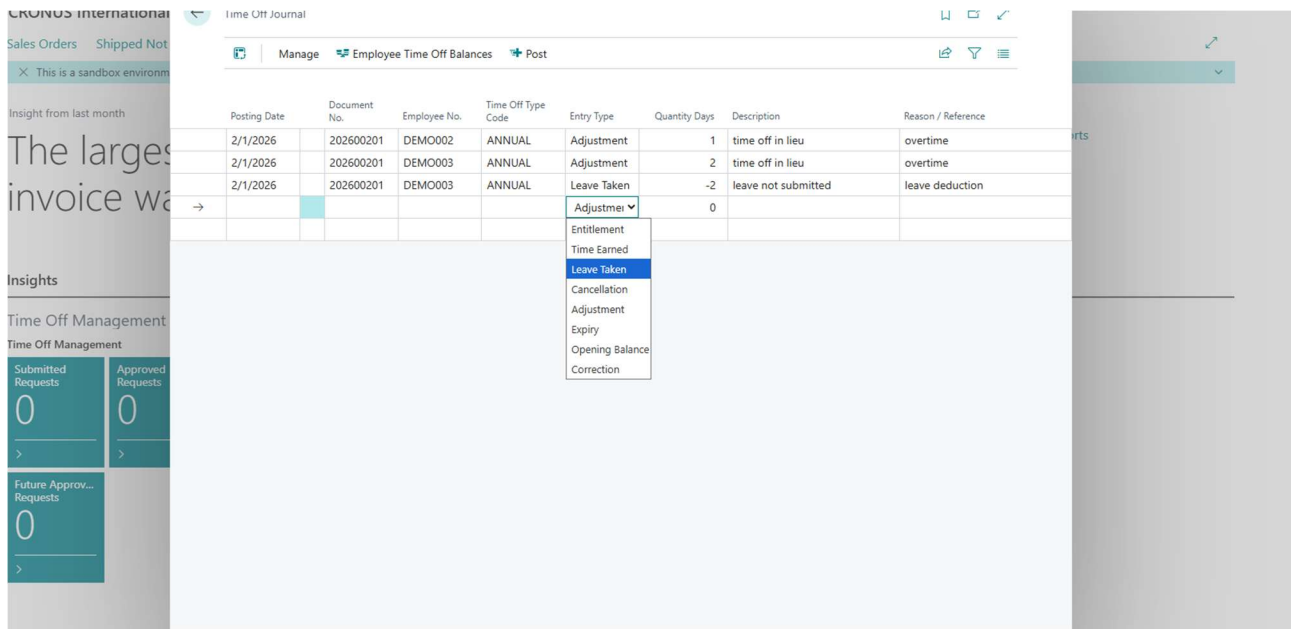
12. Business Central integration and audit trail

Employee Absence integration

For a Time Off Type with Post to Employee Absence enabled, configure a valid standard Business Central Cause of Absence Code. The application validates that the cause exists before creating the Employee Absence record. This allows Time Off Management to drive the request and balance process while still recording the absence in standard BC HR data.

Ledger and journal

Time Off Ledger Entries provide the balance audit trail. Entry types include Entitlement, Time Earned, Leave Taken, Cancellation, Adjustment, Expiry, Opening Balance and Correction. Entries carry posting date, quantity, remaining days, period, request/document references, source and reason/reference information.



Posting Date	Document No.	Employee No.	Time Off Type Code	Entry Type	Quantity Days	Description	Reason / Reference
2/1/2026	202600201	DEMO002	ANNUAL	Adjustment	1	time off in lieu	overtime
2/1/2026	202600201	DEMO003	ANNUAL	Adjustment	2	time off in lieu	overtime
2/1/2026	202600201	DEMO003	ANNUAL	Leave Taken	-2	leave not submitted	leave deduction
				Adjustment	0		

Time Off Ledger Entries provide the transaction history behind employee balances.

The Time Off Journal is the administrative mechanism for controlled balance adjustments. The ledger, rather than a manually maintained total, provides the traceable history of how a balance was formed.

13. Processing and Job Queue

Process Time Off runs the due earning and expiry processing. It can be run from Time Off Setup and can also be scheduled through the Business Central Job Queue.



Job Queue Entry Card

Codeunit · 73045613 · Time Off Processing Mgt. BNL

Home Job Queue

Set Status to Ready Set On Hold Restart Run once (foreground) Show Error

General

Object Type to Run: Codeunit
Object ID to Run: 73045613
Object Caption to Run: Time Off Processing Mgt. BNL
Description: Time Off - Process Time Off

Earliest Start Date/Time: [Field]
Job Timeout: 1 hour
Status: On Hold

Recurrence

Recurring Job: [Toggle]
Run on Mondays: [Toggle]
Run on Tuesdays: [Toggle]
Run on Wednesdays: [Toggle]
Run on Thursdays: [Toggle]
Run on Fridays: [Toggle]
Run on Saturdays: [Toggle]
Run on Sundays: [Toggle]

Next Run Date Formula: [Field]
Starting Time: 8:00:00 PM
Ending Time: 9:00:00 PM
No. of Minutes between Ru...: 60
Inactivity Timeout Period: 5

The Time Off Processing Management codeunit can be scheduled through the Business Central Job Queue.

- Weekly, Monthly, Annual and Anniversary policies are processed according to their configured earning model.
- Cycle policies process initial accrual, remaining cycle entitlement, cycle expiry and new-cycle entitlement according to Employment Date and cycle settings.
- Period-end processing applies the configured carry-forward limit and expiry logic to applicable non-cycle policies.
- Closed periods are not modified by normal processing.

The processing routines check existing postings so that scheduled processing can be run repeatedly without intentionally duplicating the same due earning transaction.

14. Putting the scenarios together

Business environment	Suggested configuration pattern
Office workforce with annual leave earned monthly	Default Mon-Fri work calendar; Annual Leave = Monthly; employee entitlements; carry-forward as policy requires; manager approval.
Shift/weekend workforce	Separate Work Calendars with actual daily hours; employee-specific calendar assignment; team staffing rules where simultaneous absence matters.
Multi-region workforce	Shared or separate Work Calendars plus region-specific Holiday Calendars assigned per employee.
Employment-based multi-year sick leave	Cycle type; cycle length; initial accrual months; work-days-per-accrual-day; employee Employment Date; employee entitlement.
Small business with no manager hierarchy	Approval Required can remain policy-driven; requests with no approval route are automatically approved.
Department with temporary manager cover	Normal employee/team manager plus dated Approval Delegation to the temporary delegate.

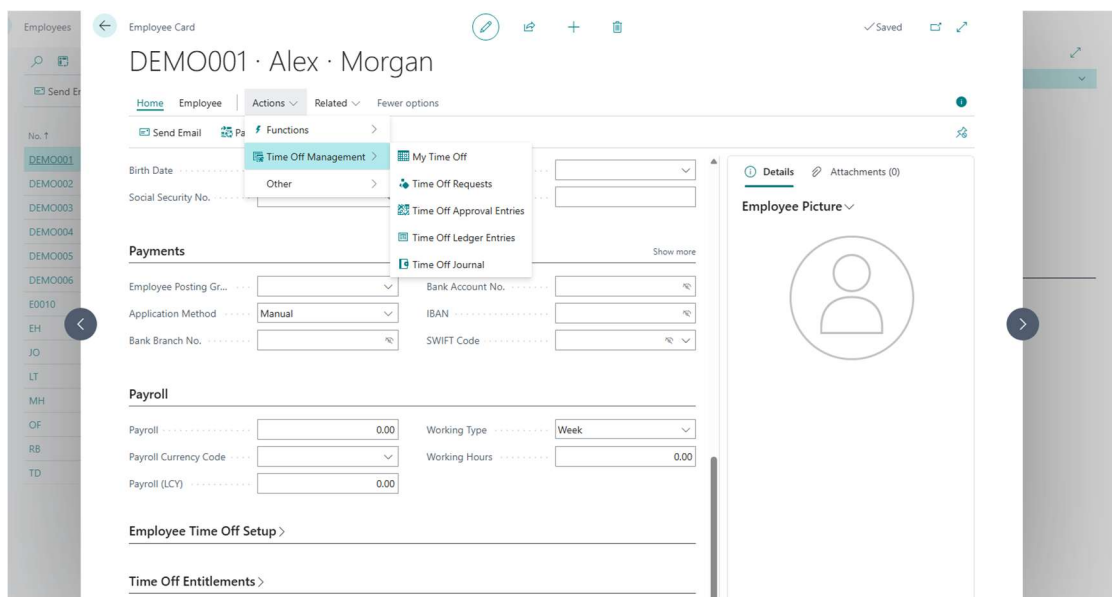


Peak-season operation	Teams + Minimum Available/Staffing Action + dated Blackout Periods targeted by team/type.
HR needs standard BC absence records	Enable Post to Employee Absence on the type and configure a valid Cause of Absence Code.
Policy requires supporting evidence	Enable Require Attachment; optionally Require Reason as well.
Policy allows borrowing against future balance	Enable Allow Negative Balance for that Time Off Type.

The application is deliberately policy-based: different Time Off Types can use different earning, approval, evidence, balance and carry-forward rules within the same company.

15. Recommended implementation sequence

- Create Work Calendars that represent the real working patterns in the business.
- Create Holiday Calendars and maintain the holiday dates for each population.
- Set the default Work Calendar and Holiday Calendar in Time Off Setup.
- Create Time Off Periods for period-based entitlements and processing.
- Create Time Off Types and select the earning model and policy controls for each type.
- Create Time Off Teams where team management or staffing rules are required.
- Create Employee Time Off Setup records and assign managers, calendars and teams as applicable.
- Create Employee Time Off Entitlements for the relevant types and periods.
- Create Approval Delegations for temporary approval cover where required.
- Create Blackout Periods for known date restrictions or warnings.
- Configure notification options and verify employee/company email information used by your BC environment.
- Test representative requests: normal day, holiday/weekend, insufficient balance, required reason/attachment, approval, return, rejection, cancellation and any Employee Absence posting used by the business.
- Run Process Time Off in a test company and verify ledger entries for each earning model before scheduling the Job Queue.



Employee Card integration gives HR visibility of Time Off Management information in the employee context.

Create Demo Setup is useful for evaluating the application and seeing example configurations. Production configuration should be based on the organization's actual policy rather than copied from demo values without review.



16. Configuration principles

A successful Time Off Management implementation starts with the policy, not the screen. Define when entitlement becomes available, which calendar determines workable time, whether unused balance survives a period boundary, who approves a request, what evidence is required and whether the absence must also be represented in standard Business Central. Then map those decisions to the configuration described in this manual.

Where a policy is jurisdiction-specific, the organization remains responsible for confirming the policy with its HR/legal advisers. Time Off Management provides configurable mechanisms for implementing the organization's chosen rules; it does not determine statutory entitlement on the organization's behalf.

For support, implementation or extension enquiries, contact Binary Lab (Pty) Ltd.

Version Information

Detail	Information
Add-on Name	Time Off Management
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