

New Page

Human Resources Module

Holiday & Overtime Planning and Approval

Procedure Guide for NCompass

NCompass Versions 11.15 (and Above)

This guide covers your core system please keep it to hand for reference.

Rev. 1.0

Authors DP

The latest Version of this guide is available in the Calculus Knowledge Base

Need further help?

Call Support on 0845 125 9193

You can also email support@findesolutions.com

Your Calculus Software Solutions support cover:

Monday - Friday 9am-5pm	For the duration of your contract.
Outside the above hours, including weekends	£75 plus VAT per incident

For help using your system, please call 0845 125 9193

For out of hours Support 0845 833 9196

For sales enquiries such as till rolls or system upgrades, please call 0845 125 9192

For VeriFone queries, please call their Helpline on 08444 828222.

[Overview](#)

[Features](#)

[Holidays](#)

[Leave & Absence Types](#)

[Annual Leave Allowance](#)

[Rules & Validation](#)

[Staff Features](#)

[Manager Features](#)

[HR Features](#)

[Notifications](#)

[Reports](#)

[Calendar Integration](#)

[Staff Features](#)

[Manager Features](#)

[HR Features](#)

[Configuration Recommendations](#)

[Configuration options](#)

[Staff Setup](#)

[Setting up HR Rules and entitlements](#)

[Setting the Absence Types](#)

[Setting Blackouts](#)

[Setting Conflict rules](#)

[Setting Staff Holiday Entitlements](#)

[Holidays](#)

[HR Dashboard - Holiday Overview](#)

[View your holidays and requests](#)

[Requesting Time Off](#)

[Approving Leave Requests](#)

[Manager Approval](#)

[Request Approval](#)

[HR Approval](#)

[Team Calander View](#)

[Manage time off in Lieu.](#)

[Edit and existing entry.](#)

[Delete an Entry](#)

[Add a New Entry](#)

[Recording Absence not requested by Staff.](#)

[Overtime](#)

[My Overtime Requests](#)

[New Overtime Request](#)

[Cancel Request](#)

[Edit Request](#)

[Record Actual Time](#)

[Overtime Dashboard / overview](#)

[Managers overtime approval Queue](#)

[Request Approval](#)

[HR Approval](#)

[Request Approval](#)

Overview

This New Module from 11.15 onwards add the ability to NCompass to track your employees Holiday and overtime.

Your employees can request holidays and overtime directly through NCompass, look at pending requests and approvals, and see their holiday entitlement and bookings.

Managers and HR staff can approve or reject request, requests go to managers first before final approval by HR Staff

NCompass HR is a separate module and requires licensing in addition to your main system.

Features

Holidays

Leave & Absence Types

Annual Leave:

Staff can submit requests.

Follows **full approval workflow** (Manager + HR).

Added to calendar immediately with prefix:

REQUESTED - PENDING APPROVAL.

When fully approved, prefix removed and suffix added:

CONFIRMED.

Other Absence Types:

Controlled by managers (staff cannot request).

No multi-step approval workflow.

Calendar entry added once manager records absence.

Sickness:

Recorded by any manager.

HR notified automatically.

HR can later update the record to confirm receipt of a sick note.

Time in Lieu:

Added by HR only (with date and notes).

Annual Leave Allowance

Each staff member has:

Annual leave allowance in days.

Defined **hours per day** (to support hourly bookings).

Staff can request leave in **days or hours**.

HR controls and can **modify allowance**:

Changes apply to the **selected year and future years**.

Past years remain unchanged for historical accuracy.

Rules for booking:

Shortest leave duration allowed (e.g., minimum 1 hour).

Longest leave duration allowed (e.g., maximum 2 weeks).

Rules & Validation

Configurable **eligibility rules** for annual leave.

Conflict detection for overlapping leave or non-compliant requests.

Blackout dates:

Can be **global**, apply to a **specific cost centre**, or apply to an **individual person**.

Conflict Rules:

Rule Type 1: *At least X of these people must NOT be absent at the same time.*

Rule Type 2: *No more than X of these people can be absent at the same time.*

People can be defined as:

A **multi-selection list** of specific staff members.

A **cost centre** (department).

Each staff member is assigned to **exactly one cost centre**.

Staff Features

Can **only request annual leave.**

View:

Annual leave booked and remaining allowance.

Upcoming leave.

List of sickness and other absences for the year.

Receive warnings for conflicts before submitting annual leave.

See declined requests with reason/comments.

Manager Features

Managers can:

Approve/decline annual leave requests (with comments).

Record other absence types.

View:

Leave and absence details for staff in their cost centre.

Their own staff-level details.

List of sickness and other absences for staff in their department.

Declined requests for reference.

HR Features

HR can:

Act as staff and manager.

Override annual leave approvals if managers are unavailable.

Add Time in Lieu entries.

Configure absence types, rules, blackout dates, and conflict rules.

Modify annual leave allowance (affects current and future years only).

Update sickness records to confirm receipt of sick notes.

Approve/decline annual leave requests (with comments).

See declined requests for reference.

Notifications

Email alerts:

To manager(s) when annual leave is requested.

To staff when annual leave is approved, declined, or amended.

To HR when sickness is recorded.

Include summary of upcoming leave and remaining allowance in staff notifications.

Reports

Annual leave balances.

Absence trends (e.g., sickness frequency).

Upcoming leave schedules.

Conflict rule compliance.

Declined requests with reasons.

Calendar Integration

Immediate calendar entry for annual leave requests with status prefix.

Automatic update when approval status changes.

Removal of calendar entry if request is declined or cancelled.

Other absence types added to calendar upon manager entry.

Overtime

Overtime:

Staff can submit requests.

Requests include overtime rate

Overtime request can tag Projects

Follows **full approval workflow** (Manager + HR).

Staff Features

Can **request overtime**.

Update Overtime with actual time worked

View:

Overtime booked and approval status

Receive warnings for conflicts before submitting overtime.

See declined requests with reason/comments.

Manager Features

Managers can:

Approve/decline overtime requests (with comments).

View overtime requests of managed staff

HR Features

HR can:

Act as staff and manager.

Override overtime approvals if managers are unavailable.

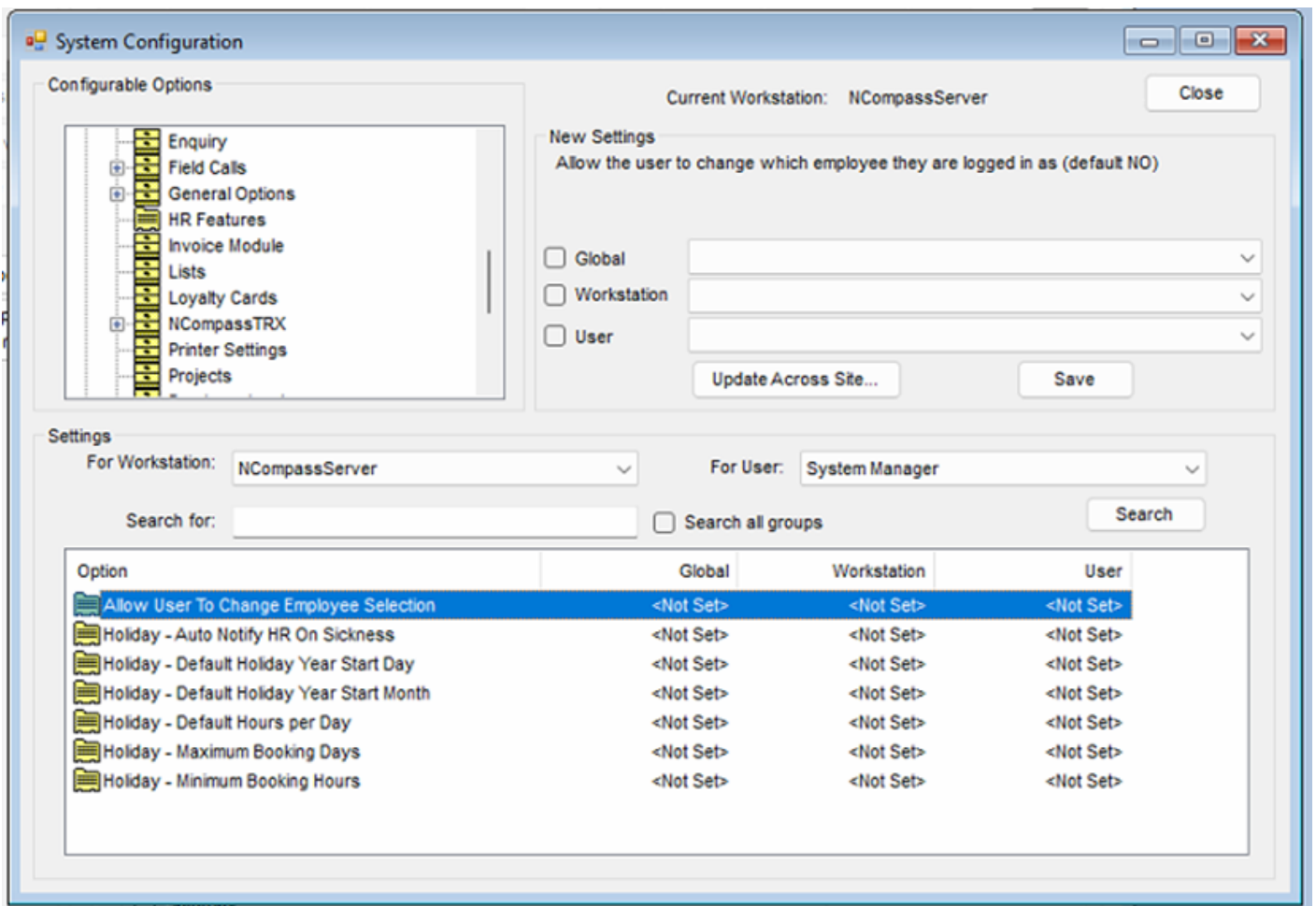
Run overtime reports.

Configuration Recommendations

It's recommended that your system be locked down, so that each member of staff has their own user login and that that login is tied to the salesperson.

Configuration options

The following options can be set under system configuration.



§ Allow Users to Change Employee Selections – this is defaulted to ‘No’, this prevents users from looking at other employees’ requests, its recommended that you lock you salesperson to the user login.

§ Holiday – Auto Notify HR on Sickness – this will email all staff marked in a HR roll automatically to make them aware of the sickness leave.

§ Holiday – Holiday Year Start Date – this sets the start date of your 12-month holiday period, it defaults to 1st.

§ Holiday – Holiday Year Start Month - this sets the start Month of your 12-month holiday period, it defaults to January.

§ Holiday – Default hours per day – this is set to a default of 8.5 hours

§ Holiday – Maximum booking days – this is the maximum a employee can book as a single block, defaults to 28 days

§ Holiday – Minimum booking Hours – the minimum time of request

Staff Setup

For each member of staff, you will need to set up the following.

§ HR role

§ Who they report to directly (manager / Line manager)

§ Their backup manager

§ Default working hours.

Administration > Salespersons Engineers > Edit

Salesperson / Engineer Administration

Salespeople / Engineers
 Salesperson Engineer
 Group:
 Carrier Type:

Ben Barter
Carrier 24 Hour Service
Carrier 48 Hour Service
CHRIS
Customer Collection
Customer Taken
David Pinder
Delivery Van 1 - SOUTH
Delivery Van 2 - SOUTH
Delivery Van 3 - NORTH
DPD Next Day
DPD Standard
Duncan Shaw
Jordan Lane
Rupert Woolger
Sam Newsome
Service Van 1 - SOUTH
Service Van 2 - NORTH
Website

Edit >
Create Using
Create New >
Delete

Print Label
Show GPS Location

Close Show Expired Expired To Do list Private Cancel Save

Sales Person Details
Screen Name: Ben Barter Print Name: Ben Barter
Job Title / Carrier Service Level Description: SALES PERSON

Carrier Carrier Customs Forms Carrier Integration HR Skills Advanced Marketplace IDs M365

HR Roles
 Staff
 Manager
 HR

Reports To: Rupert Woolger
 Reports To (2): David Pinder

Default Working Hours
 Monday From: 8:00 To: 17:00
 Tuesday From: 8:00 To: 17:00
 Wednesda From: 8:00 To: 17:00
 Thursday From: 8:00 To: 17:00S
 Friday From: To:
 Saturday
 Sunday

No Auto-Book Slots
 Monday
 Tuesday
 Wednesda
 Thursday
 Friday
 Saturday
 Sunday

- Set the HR roles.

§ All employees must be marked as Staff to be include in the HR system.

§ Managers that need to approve staff requests should be marked as managers.

§ At least one member of staff must have an HR role.

Rules are applied by cost centre, so you will need to ensure that each employee is in the correct cost centre.

- Click on the 'Contacts / Settings tag'
- Click 'Edit' (if not already in editing mode)
- Select the correct cost centre from the dropdown list
- Click 'Save'

You can Manage cost centres from

Administration > Accounting > Cost Centres

Setting up HR Rules and entitlements

You should now setup the following:

§ Absence types - List of reason for absence

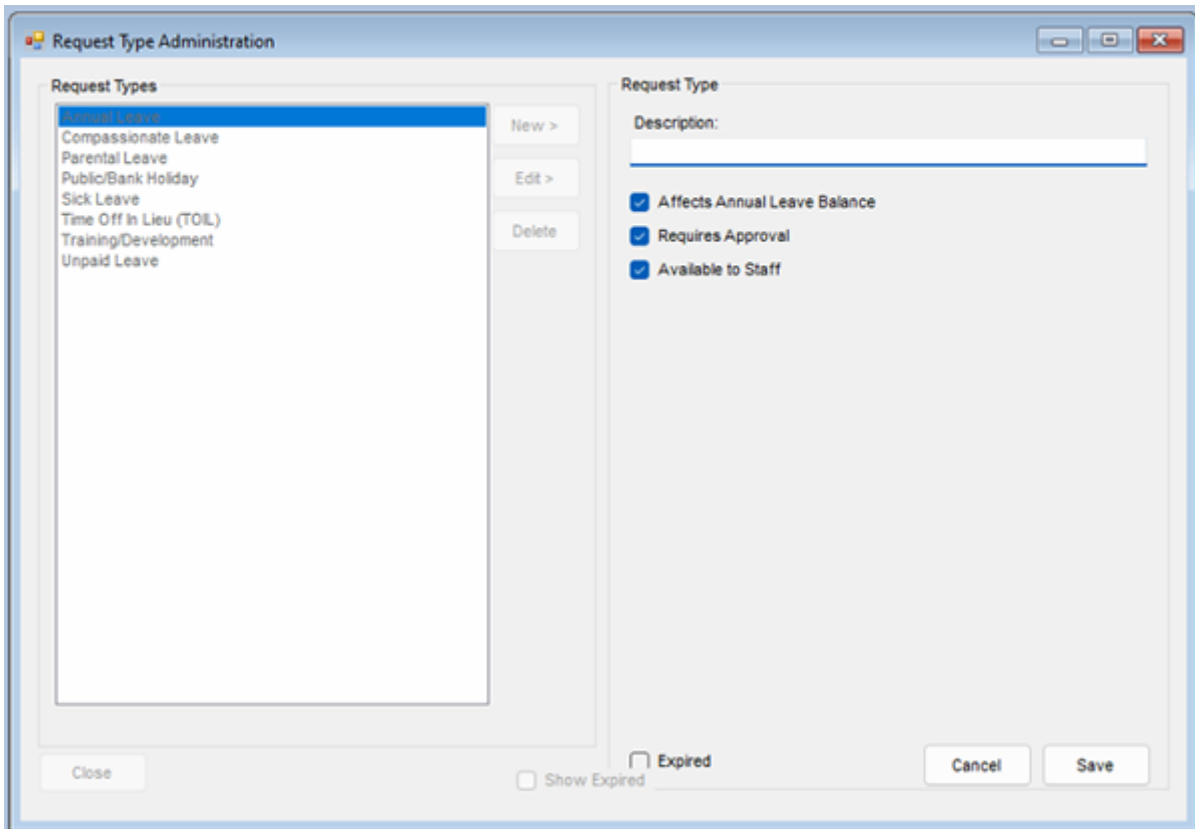
§ Blackout Dates - dates that holidays are blocked

§ Conflict Rules - allowing you to limit the number of staff off in a cost centre

§ Holiday Entitlement - set the default entitlement for each staff member

Setting the Absence Types

Administration > HR Manage Absence Types



There is a of standard Absence types you can edit or add to

For each absence type check the relevant option

§ Affects Annual Leave

§ Requires Approval

§ Available to Staff - this needs to be checked for staff to be able to request this type of leave

Setting Blackouts

Administration > HR > Manage Blackout Dates

Blackouts lets you set date ranges when no holiday should be booked, any member of staff that is in the cost centre to which the blackout applies will be warned at the point of booking annual leave that the dates are not available.

Blackout Date Administration

Blackout Periods

Blacked Out

New >

Edit >

Delete

Close

Blackout Period Details

Description:
Blacked Out

Start Date: 01/04/2026 End Date: 02/04/2026

Cost Centre:
Default Cost Centre
Default Cost Centre
Multimedia

All Depts

Cancel Save

§ Click 'New' or select an existing blackout and click 'Edit'.

§ Enter a description for this Blackout.

§ Set the start and end date.

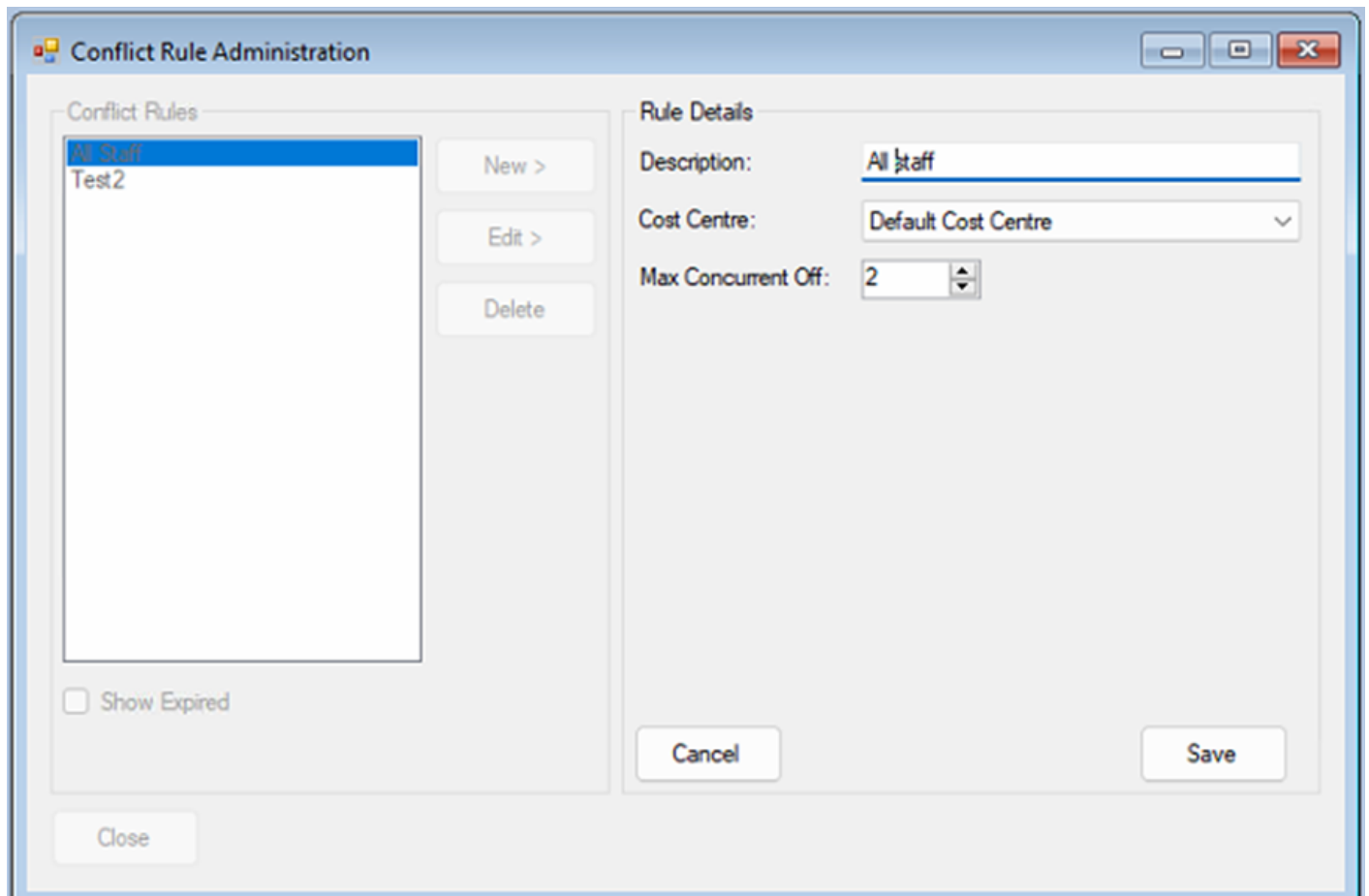
By default the blackout will be for all departments (cost centres), if this entry only applies to a specific cost centre, uncheck the 'All Depts' checkbox, you will then be able to select a specific cost centre

Click 'Save'

Setting Conflict rules

Administration > HR > Manage Conflict Rules

Conflict rules allow you to set the maximum number of staff that can be absent at any one time for that a cost centre



The screenshot shows the 'Conflict Rule Administration' window. On the left, there is a list of conflict rules with 'All Staff' selected. To the right of the list are buttons for 'New >', 'Edit >', and 'Delete'. Below the list is a checkbox for 'Show Expired'. On the right side of the window, the 'Rule Details' section contains a text field for 'Description' with the value 'All Staff', a dropdown menu for 'Cost Centre' with the value 'Default Cost Centre', and a spinner control for 'Max Concurrent Off' with the value '2'. At the bottom of the window are buttons for 'Cancel', 'Save', and 'Close'.

§ Click 'New' or select an existing conflict entry and click 'Edit'.

§ Enter a description for this conflict.

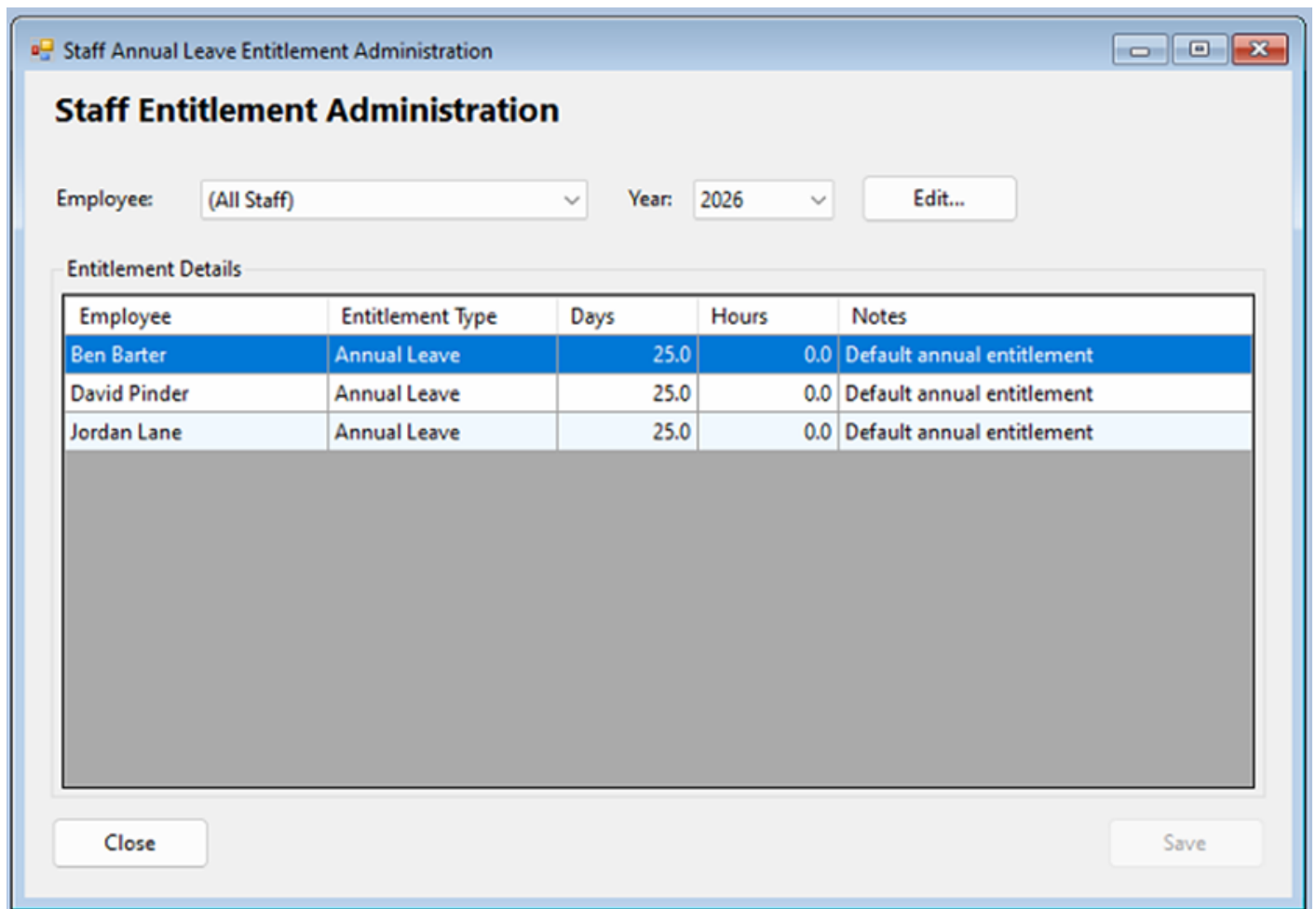
§ Set the cost centre from the drop-down list.

§ Set the total number of staff for this cost centre conflict rule.

§ Click 'Save'

Setting Staff Holiday Entitlements

Administration > HR > Manage Entitlements



The screenshot shows a software window titled "Staff Annual Leave Entitlement Administration". At the top, there is a header "Staff Entitlement Administration". Below the header, there are two dropdown menus: "Employee:" with the value "(All Staff)" and "Year:" with the value "2026". To the right of these is an "Edit..." button. Below the dropdowns is a section titled "Entitlement Details" containing a table with five columns: "Employee", "Entitlement Type", "Days", "Hours", and "Notes". The table lists three employees: Ben Barter, David Pinder, and Jordan Lane, all with "Annual Leave" entitlement, 25.0 days, 0.0 hours, and the note "Default annual entitlement". At the bottom of the window, there are "Close" and "Save" buttons.

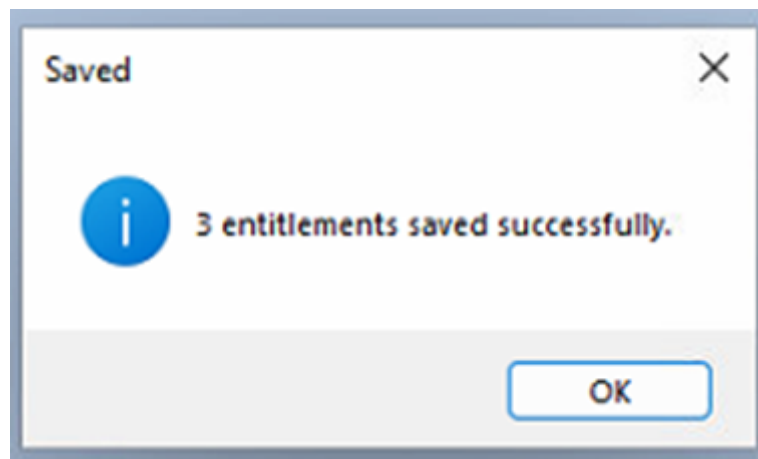
Employee	Entitlement Type	Days	Hours	Notes
Ben Barter	Annual Leave	25.0	0.0	Default annual entitlement
David Pinder	Annual Leave	25.0	0.0	Default annual entitlement
Jordan Lane	Annual Leave	25.0	0.0	Default annual entitlement

Your employees will initially have the default entitlement, to change.

§ Click 'Edit'

§ Click into any of the Cells for any Employee and make your adjustments.

§ Click 'Save'



All entries in the grid will be updated.

The entitlement screen will also show any additional time added in addition to the staff member's annual leave.

Staff Annual Leave Entitlement Administration

Staff Entitlement Administration

Employee: (All Staff) Year: 2026 Edit...

Entitlement Details

Employee	Entitlement Type	Days	Hours	Notes
Ben Barter	Annual Leave	20.0	4.0	Standard annual entitlement
David Pinder	Annual Leave	25.0	0.0	Default annual entitlement
Jordan Lane	Annual Leave	25.0	0.0	Default annual entitlement
Duncan Shaw	TOIL	1.0	0.0	Rollover
David Pinder	TOIL	0.1	0.0	Test
Rupert Woolger	TOIL	1.0	0.0	Been Working Too Hard
Ben Barter	TOIL	2.0	0.0	Works Hard For His Money
Ben Barter	TOIL	6.0	0.0	Bonus
Sam Newsome	Annual Leave	25.0	0.0	Default annual entitlement

Close Save

Holidays

HR Dashboard – Holiday Overview

HR > Holidays > Dashboard/Overview

This screen allows staff to see all upcoming leave, pending requests and recent decisions.

Note The view presented here will change depend in your job Role.

Staff - will only see their overview.

Managers - will see entries for all staff that they manage.

HR - will see all entries.

HR Holiday Dashboard - All Staff

Filters

Year: 2026 Cost Centre: Default Cost Centre Show Declined
Date From: Salesperson: Show Cancelled
Date To: Show Expired

Statistics

Pending Approvals: **2**
Staff Off Today: **1**
Staff Off This Week: **2**

Upcoming Leave

Employee	Type	Start	End	Days	Status
David Pinder	Annual Leave	31/03/2026	31/03/2026	1.00	Pending HR Approval
Duncan Shaw	Annual Leave	03/04/2026	10/04/2026	6.00	Pending Manager Approval

Recent Decisions

Employee	Type	Start	End	Days	Status	Decision	By
Duncan Shaw	Annual Leave	01/04/2026	02/04/2026	2.00	Declined by HR	31/03/2026	David Pinder
David Pinder	Annual Leave	27/03/2026	27/03/2026	1.00	Approved	26/03/2026	David Pinder
David Pinder	Annual Leave	31/03/2026	31/03/2026	1.00	Pending HR Approval	26/03/2026	Rupert Woolger
Duncan Shaw	Annual Leave	03/04/2026	10/04/2026	6.00	Pending Manager Approval	31/03/2026	David Pinder

[View Calendar](#) [Refresh](#) [Close](#)

The dashboard can be filtered by

§ Year

§ Date from

§ Date to

§ Salesperson

§ Cost Centre

You can hide or show.

§ Declined Requests

§ Cancelled Requests

§ Expired Requests

You will only be able to see the HR Dashboard if you are tagged as a member of the HR

View your holidays and requests

HR > Holidays My Holiday Entitlement /View

This will show you all your holiday Requests and approvals, along with your free and used entitlement.

My Holidays

Salesperson:

Holiday Year:

Entitlement Summary

Annual Entitlement: Used: Pending: Remaining:

Carried Forward: Time In Lieu:

Upcoming Leave & Pending Requests

Type	Start Date	End Date	Days	Status	Notes
Annual Leave	03/04/2026	10/04/2026	6.00	Approved	
Annual Leave	01/05/2026	08/05/2026	5.50	Pending HR Appr...	Holiday

Request History

Type	Start Date	End Date	Days	Status	Decision Date	Approved By
Annual Leave	01/04/2026	02/04/2026	2.00	Declined by HR	01/01/0001	

New Cancel Refresh Close

Note: your requests may need approval by both your line manager and HR before its fully approved

Type	Start Date	End Date	Days	Status	Notes
Annual Leave	03/04/2026	10/04/2026	6.00	Approved	
Annual Leave	01/05/2026	08/05/2026	5.50	Pending HR Appr...	Holiday

Requesting Time Off

HR > Holidays > Submit new Request

New Holiday Request ✕

Salesperson: ▾

Request Type: ▾

Start Date: ▾ Half Day

End Date: ▾ Half Day ▾

Notes:

Request Summary

Total Days Requested: Remaining After:

Team Conflicts:

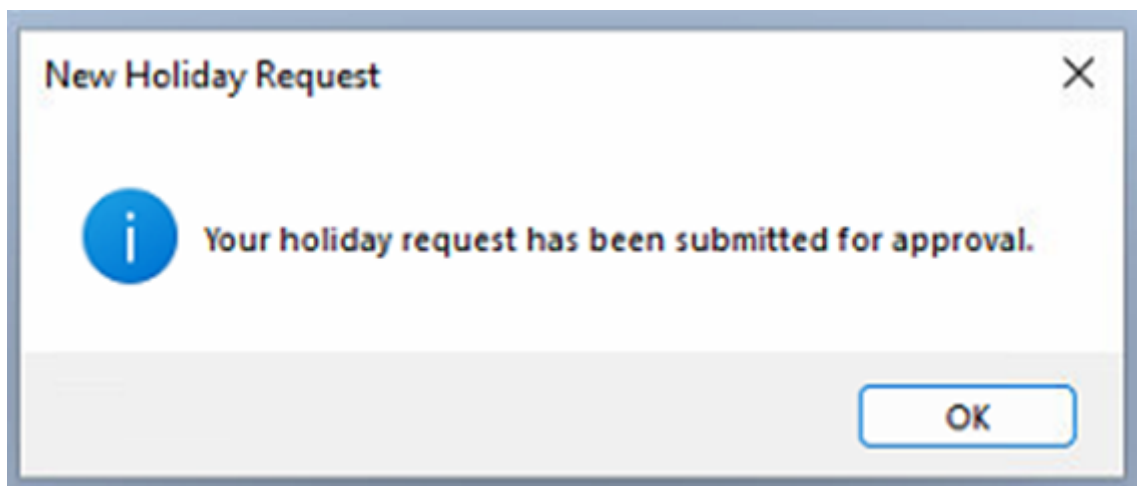
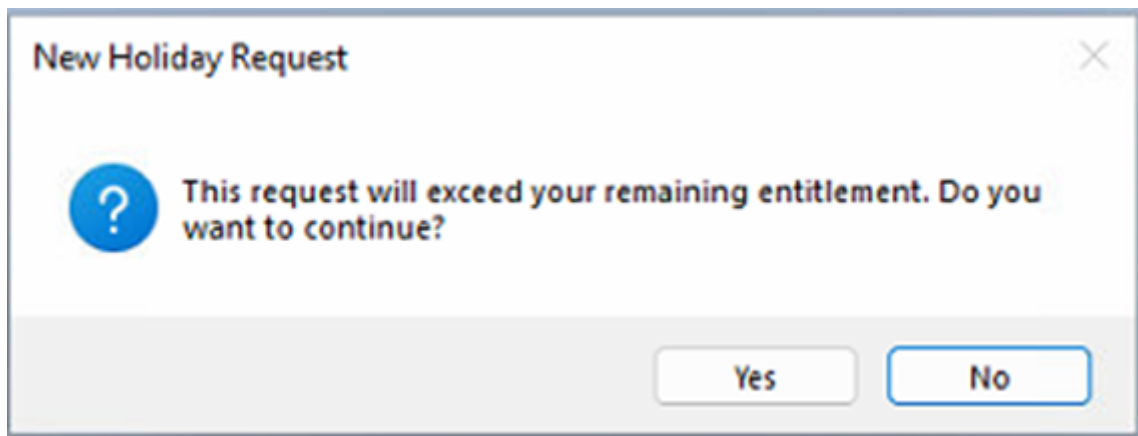
- Select the request type from the drop-down list (annual leave)
- Select the start date of your leave request.
- Select the last day of your leave request.

Note: you can select half days by clicking the half day check box, select AM or PM for the Half Day

It will calculate the number of days requested based on your working days, as well as your entitlement, if your request clashes with other team members or a blackout day, this will be shown

Click Confirm

if your request does not clash, the request will be sent for approval. If it does clash the request can still be submitted, although it may not be approved, you will be asked if you want to continue



Approving Leave Requests

The normal process for approval is...

Staff Member Submits Request >> Manger Approves >> HR approves.

However, HR staff can directly Approve requests if required.

Manager Approval

HR >Holidays > Managers Approval Queue

Holiday Approval - Manager

Manager:

Pending Requests

Employee	Type	Start	End	Days	Submitted
Sam Newsome	Annual Leave	20/04/2026	24/04/2026	5.00	02/04/2026
Duncan Shaw	Annual Leave	20/04/2026	20/04/2026	1.00	02/04/2026
Ben Barter	Annual Leave	27/04/2026	01/05/2026	5.00	02/04/2026
Ben Barter	Annual Leave	02/07/2026	16/07/2026	11.00	02/04/2026

Request Details

Employee: Type:

Dates: Total Days: Remaining:

Request Notes:

Conflicts:

Manager Notes:

Team Calendar (same period)

Employee	Type	Start	End	Status
Ben Barter	Annual Leave	20/04/2026	24/04/2026	Approved
Duncan Shaw	Annual Leave	20/04/2026	20/04/2026	Pending App...
Sam Newsome	Annual Leave	20/04/2026	24/04/2026	Pending App...

You will see the pending requests for all the staff you manage.

- Select one of the requests from this list.

The request details will be shown along with any notes and the remaining entitlement days.

Request Approval

- Highlight the request you want to approve or decline.

the request details will update to show the leave type, requested dates, total days and the days the staff member has left after this approval.

- Click Approve or Decline

HR Approval

HR >Holidays > HR Approval Queue

Holiday Approval - HR

HR User:

Pending Requests

Employee	Type	Start	End	Days	Submitted
David Pinder	Annual Leave	31/03/2026	31/03/2026	1.00	26/03/2026
Sam Newsome	Annual Leave	20/04/2026	24/04/2026	5.00	02/04/2026
Duncan Shaw	Annual Leave	20/04/2026	20/04/2026	1.00	02/04/2026
Ben Barter	Annual Leave	27/04/2026	01/05/2026	5.00	02/04/2026
Duncan Shaw	Annual Leave	01/05/2026	08/05/2026	5.50	31/03/2026
Ben Barter	Annual Leave	02/07/2026	16/07/2026	11.00	02/04/2026

Request Details

Employee: Type:

Dates: Total Days: Remaining:

Request Notes:

Conflicts:

HR Notes:

Team Calendar (same period)

Employee	Type	Start	End	Status
Ben Barter	Annual Leave	27/04/2026	01/05/2026	Pending App...
Duncan Shaw	Annual Leave	01/05/2026	08/05/2026	Pending HR ...

You will see the pending requests for all the staff.

- Select one of the requests from this list.

The request details will be shown along with any notes and the remaining entitlement days.

Request Approval

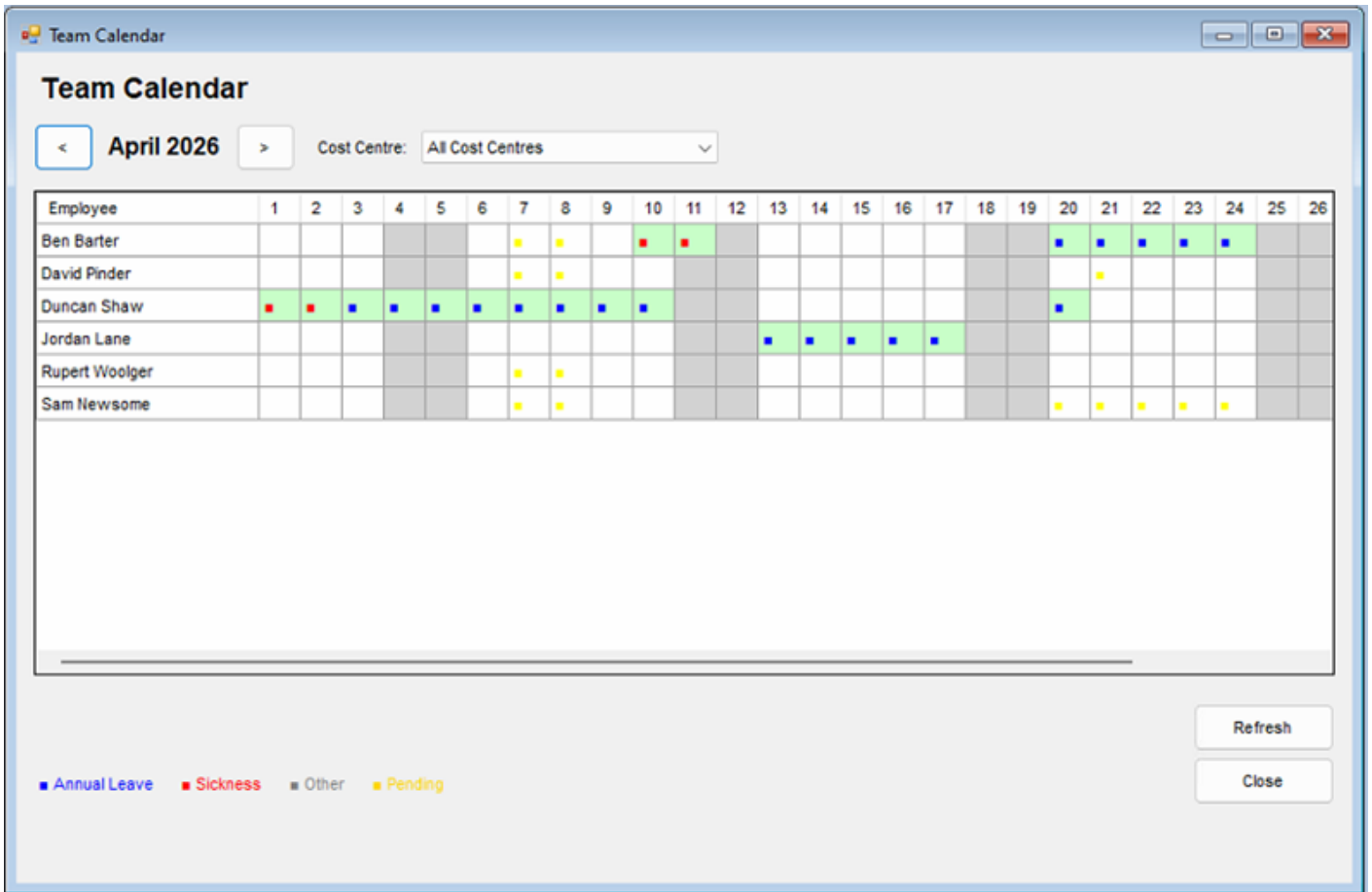
- Highlight the request you want to approve or decline.

the request details will update to show the leave type, requested dates, total days and the days the staff member has left after this approval.

- Click Approve or Decline

Team Calander View

The team calendar view will allow you to see all annual leave, pending requests, Sick leave and any other absences in a monthly calendar grid.



The left and right buttons will advance or retard the monthly view.

You can apply a cost centre filter from the drop down list.

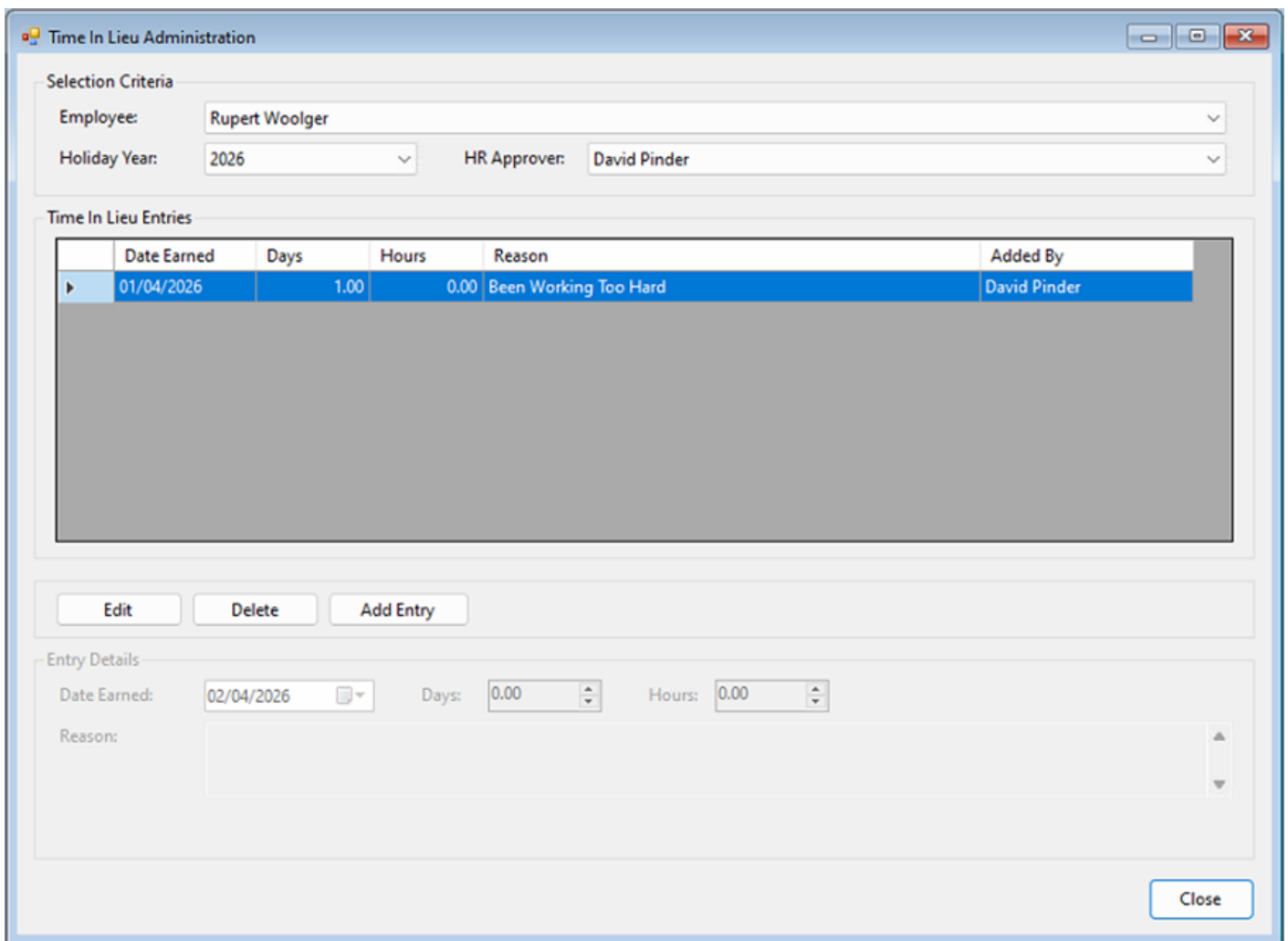
The entries are colour coded as per the legend on screen.

- Blue - Annual Leave
- Red - Sickness
- Grey - Other leave Types
- Orange - Pending approvals.

Manage time off in Lieu.

Time Off in Lieu can only be managed by HR staff.

HR > Holidays > Manage Time Off in Lieu



The screenshot shows a software window titled "Time In Lieu Administration". It contains several sections:

- Selection Criteria:** Includes dropdown menus for "Employee" (Rupert Woolger), "Holiday Year" (2026), and "HR Approver" (David Pinder).
- Time In Lieu Entries:** A table with columns: Date Earned, Days, Hours, Reason, and Added By. One entry is visible: Date Earned: 01/04/2026, Days: 1.00, Hours: 0.00, Reason: Been Working Too Hard, Added By: David Pinder.
- Buttons:** "Edit", "Delete", and "Add Entry" are located below the table.
- Entry Details:** A section for editing an entry with fields for "Date Earned" (02/04/2026), "Days" (0.00), and "Hours" (0.00), and a "Reason" text area.
- Close Button:** Located at the bottom right of the window.

Selecting the staff member from the drop-down list of employees will show all additional time off allowances that have already been added.

You can

Edit and existing entry.

- Highlight the entry and click 'Edit'.
- Update the required information, date entered, days and hours.
- Click 'Save'

Delete an Entry

- Highlight the entry and click 'Delete'.

Time In Lieu Administration

Selection Criteria

Employee: Rupert Woolger

Holiday Year: 2026 HR Approver: David Pinder

Time In Lieu Entries

	Date Earned	Days	Hours	Reason	Added By
▶	01/04/2026	1.00	0.00	Been Working Too Hard	David Pinder

Edit Delete Add Entry

Entry Details

Date Earned: 02/04/2026 Days: 0.00 Hours: 0.00

Reason:

Close

You will be asked to confirm this deletion

Add a New Entry

- Click 'Add Entry'
- Enter the number of days, and hours, the entry date will automatically set to the current date.
- Click 'Save'
-

Recording Absence not requested by Staff.

Both Manager and HR staff can record any type of absence, even if it has not been requested by a staff member

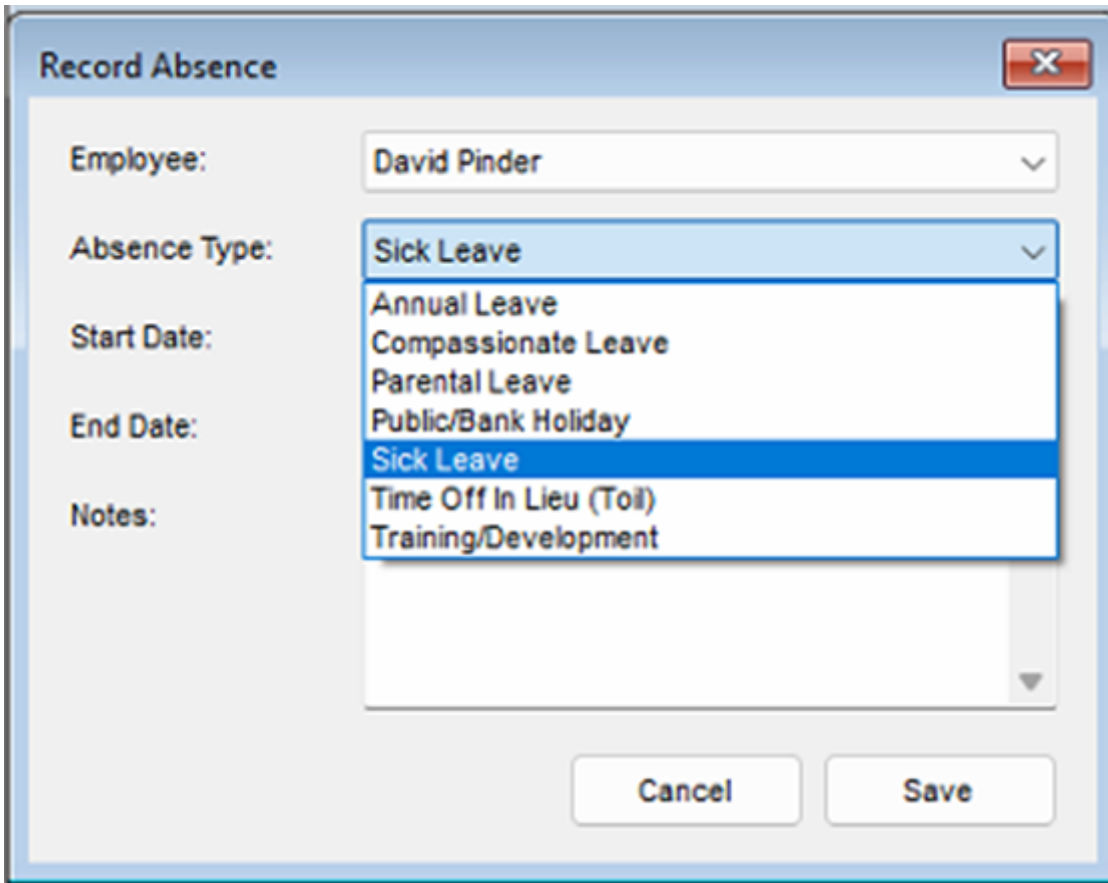
HR > Holidays > Managers Approval Queue

HR > Holidays HR Approval Queue

At the bottom of both these screens you will see a 'Record Absence' Button



Click 'Record Absence'

A screenshot of a software dialog box titled "Record Absence". The dialog has a light blue header with a close button (X) in the top right corner. Below the header, there are several fields: "Employee:" with a dropdown menu showing "David Pinder"; "Absence Type:" with a dropdown menu showing "Sick Leave" and a list of other options: "Annual Leave", "Compassionate Leave", "Parental Leave", "Public/Bank Holiday", "Sick Leave" (highlighted in blue), "Time Off In Lieu (Toil)", and "Training/Development"; "Start Date:" and "End Date:" with empty input fields; and "Notes:" with a large empty text area. At the bottom of the dialog, there are two buttons: "Cancel" and "Save".

Record Absence

Employee: David Pinder

Absence Type: Sick Leave

Start Date:

End Date:

Notes:

Annual Leave
Compassionate Leave
Parental Leave
Public/Bank Holiday
Sick Leave
Time Off In Lieu (Toil)
Training/Development

Cancel Save

- Select the Staff Member
- Select the reason from the Absence type dropdown list.
- Select the start date and end date.
- Add any notes.
- Click Save

The Absence still need to be approved by Mangers and HR

Overtime

My Overtime Requests

HR > Overtime > My Overtime View

My Overtime Requests

My Overtime Requests

Salesperson: Only My Requests

Year: Show Cancelled
 Show Declined

Pending & Upcoming Requests

Requested	Start Date	Time	Hours	Actual Hrs	Project	Rate	Manage
31/03/2026	31/03/2026	14:26	1.5		[Default Project]	Default Rate	Pending

Request History

Requested	Start Date	Time	Hours	Actual Hrs	Project	Manager	Mgr Decision	Manager
01/04/2026	01/04/2026	14:16	1.25	1.30	[Default Project]	N/A - Cancel...	01/04/2026	David Pinder

This will show you all your overtime requests and your request history.

New Overtime Request

Click the 'New Request' button.

The screenshot shows a software window titled "Overtime Request". It contains several input fields and a text area. The "Salesperson" field is set to "Rupert Woolger". The "Overtime Rate" is set to "Default Rate". The "Project" is set to "[Default Project]". The "Start Date" is "02/04/2026" and the "Start Time" is "11:38". The "Duration (hours)" is "1.00" and the "End Time" is "12:38". The "Notes" text area contains the text "working late on S project". The "Conflicts" field is set to "None". At the bottom left is a "Cancel" button and at the bottom right is a "Submit" button.

Your Name will be pre-selected.

Update the request with the following information.

§ Overtime rate – if your organisation has more than one rate, please select it from the dropdown list.

§ Project – if you use NCompass Project Tracking, select the project, if not leave it set to default

§ Enter the start date and time.

§ Enter the duration of the overtime- the end time will be calculated automatically.

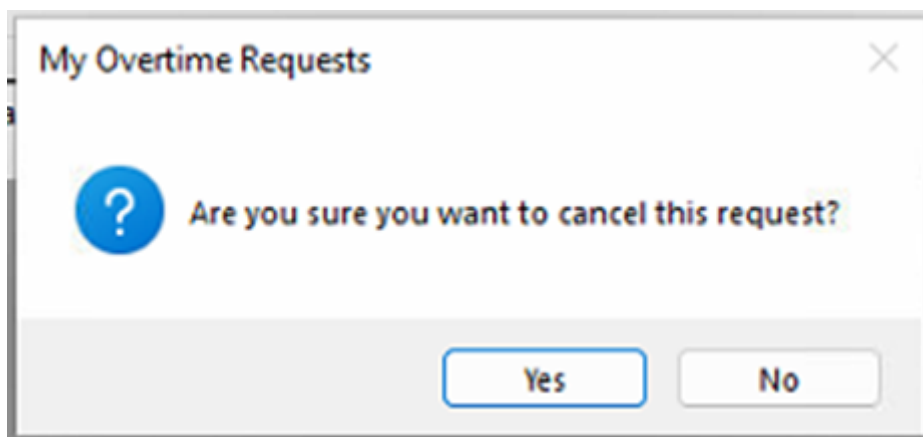
§ Add any notes.

Click 'Submit'

Your request will be submitted for approval by your manager or the HR Team

Cancel Request

- Highlight the request you want to cancel.
- Click the 'Cancel Request' button.

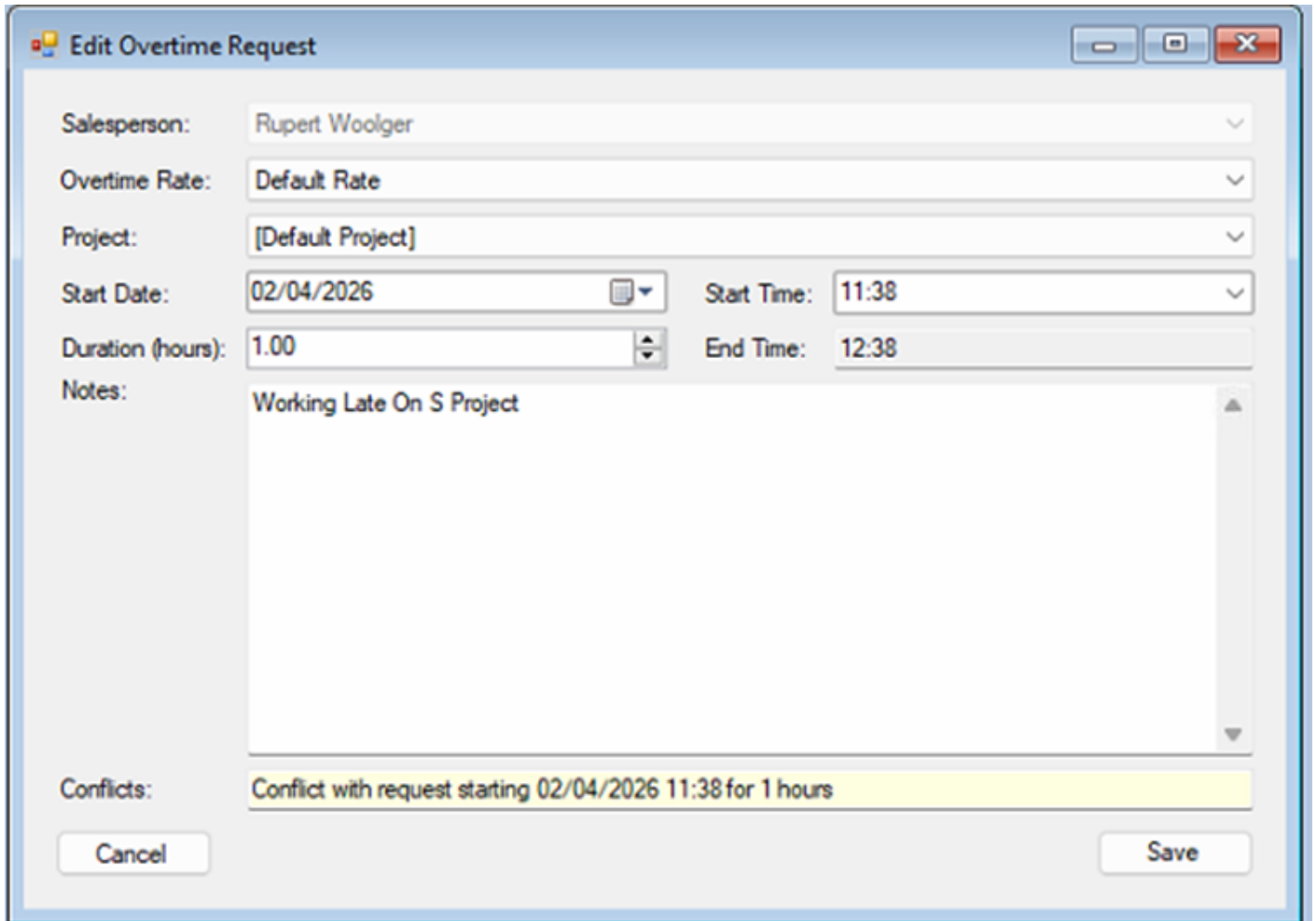


- Confirm the cancellation.

Edit Request

- Highlight the request you want to Edit.

- Click the 'Edit Request' button.

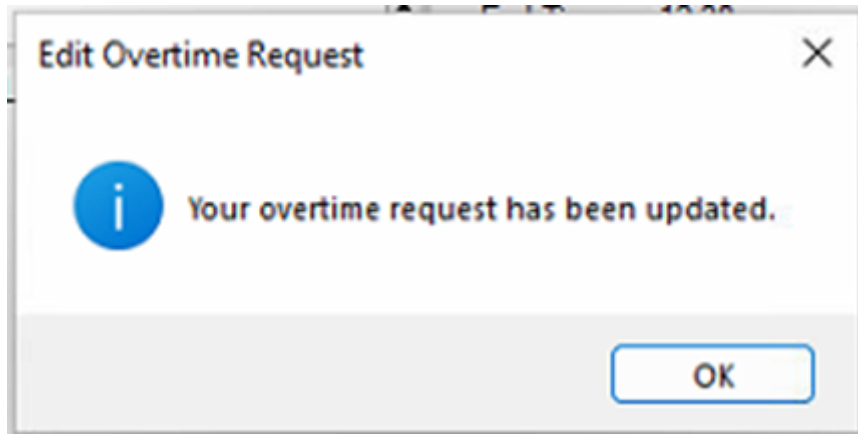


The screenshot shows a dialog box titled "Edit Overtime Request" with standard window controls (minimize, maximize, close) in the top right corner. The dialog contains several input fields and a text area:

- Salesperson:** A dropdown menu with "Rupert Woolger" selected.
- Overtime Rate:** A dropdown menu with "Default Rate" selected.
- Project:** A dropdown menu with "[Default Project]" selected.
- Start Date:** A date input field containing "02/04/2026" with a calendar icon to its right.
- Start Time:** A time input field containing "11:38" with a dropdown arrow to its right.
- Duration (hours):** A numeric input field containing "1.00" with a spinner icon to its right.
- End Time:** A time input field containing "12:38" with a dropdown arrow to its right.
- Notes:** A text area containing the text "Working Late On S Project".
- Conflicts:** A yellow highlighted text box containing the message "Conflict with request starting 02/04/2026 11:38 for 1 hours".

At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.

- Update the request details.
- Click 'Save'



Record Actual Time

Once your request has been approved, you can update the request with the actual overtime worked.

Click 'Record Actual Time'

Record Actual Overtime

Record Actual Overtime

Request Details (Read-Only)

Project: [Default Project] Date: 02/04/2026

Estimated: 1.00 hours Rate: Default Rate

Actual Time Worked

Start Date: 02/04/2026 Start Time: 11:38

End Date: 02/04/2026 End Time: 12:38

Duration (hours): 1.00 vs Estimated (hrs): +0.00

Calculated (auto): 1.00

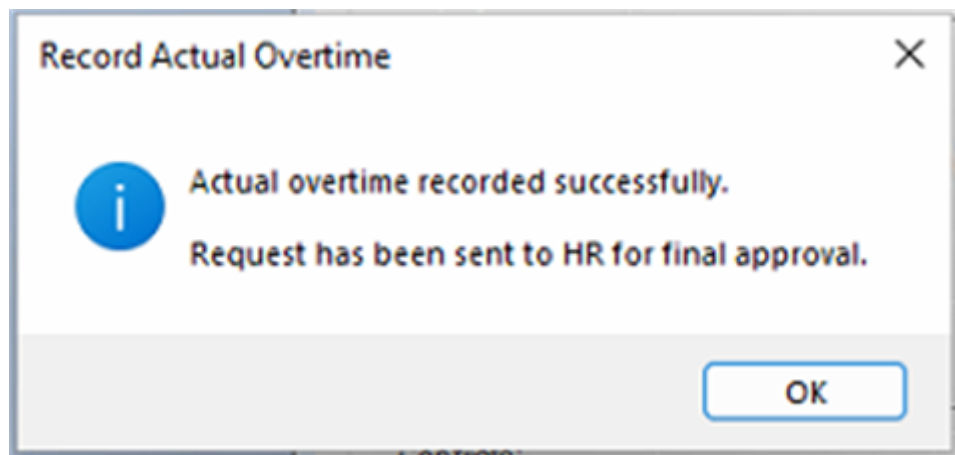
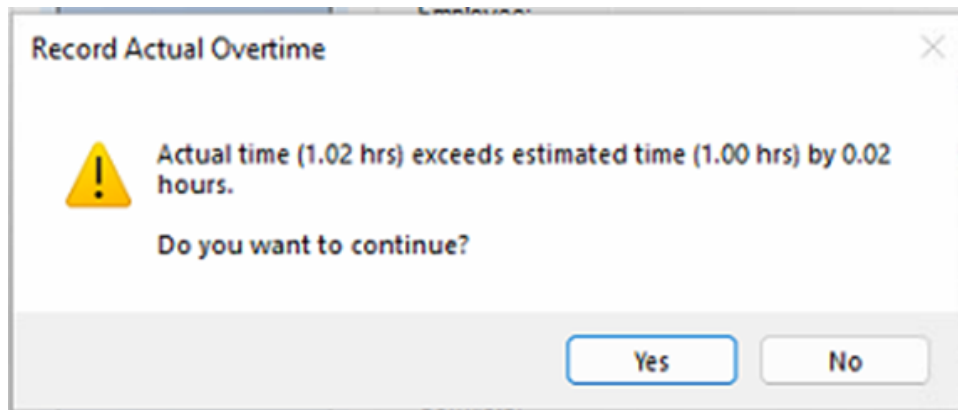
Actual Notes:

Cancel Save

Update your timings.

- Click 'Save'

If your timings exceed your initial request, you will be warned, please check your timings or proceed.



Overtime Dashboard / overview

HR > Overtime > Overtime Dashboard/Overview

Note The view presented here will change depend in your job Roll.

staff - will only see their overview.

Managers - will see entries for all staff that they manage.

HR - will see all entries.

HR Overtime Dashboard - All Staff

Filters

Year: 2026 Cost Centre: Show Declined

Date From: Salesperson: David Pinder Show Cancelled

Date To: Show Expired

Statistics

Pending Approvals: 3

Approved Total Hours: 0.00

Approved Month Hours: 0.0

Overtime

Employee	Date	Time	Req Hours	Act Hours	Project	Rate	Manager	Manager	Manager Comments
David Pinder	31/03/2026	12:49	1.25		[Default Project]	Default Rate	Pending	Ben Barter	

Recent Decisions

Employee	Date	Hours	Actual	Project	Rate	Manager Decision	Mgr Decision Date	Manager	Manager Comments
----------	------	-------	--------	---------	------	------------------	-------------------	---------	------------------

View Reports Refresh Close

This Will give you an overview of your overtime booked, and any recent decisions.

The information can be filtered by

§ Date Range

§ Cost Centre

§ Salesperson

And declined, cancelled and expired can be shown or hidden.

Managers overtime approval Queue

HR >Holidays > Managers Approval Queue

Overtime Approval - Manager

Manager:

Pending Requests

Employee	Requested	Date	Time	Est. Hours	Actual Hours	Project	Rate
David Pinder	31/03/2026	31/03/2026	12:49	1.25		[Default Project]	Default Rate
Duncan Shaw	31/03/2026	31/03/2026	14:26	1.5		[Default Project]	Default Rate

Request Details

Employee: Project:

Date: Start Time: Rate:

Duration (hrs): End Time: YTD Hours:

Request Notes:

Conflicts:

Manager Notes:

You will see the pending requests for all the staff you manage.

Select one of the requests from this list.

The request details will be shown along with any notes and the remaining entitlement days.

Request Approval

- Highlight the request you want to approve or decline.

the request details will update to show the leave type, requested dates, total days and the days the staff member has left after this approval.

- Click Approve or Decline

HR Approval

HR >Overtime > HR Approval Queue

Overtime Approval - HR

HR User:

Pending Requests

Employee	Requested	Date	Time	Est. Hours	Actual Hours	Project	Rate	Manager Notes	HR Notes	Actual Time Notes
Rupert Woolger	08/04/2026	08/04/2026	15:00	1	1.00	[Default Project]	Default Rate			

Request Details

Employee: Project:

Date: Start Time: Rate:

Duration (hrs): End Time: YTD Hours:

Actual Hours: Actual Variance:

Request Notes:

Conflicts:

HR Notes:

You will see the pending requests for all the staff.

- Select one of the requests from this list.

The request details will be shown along with any notes and the remaining entitlement days.

Request Approval

- Highlight the request you want to approve or decline.

the request details will update to show the Project, rate, start time, end time, actual hours and the Variance from the original request

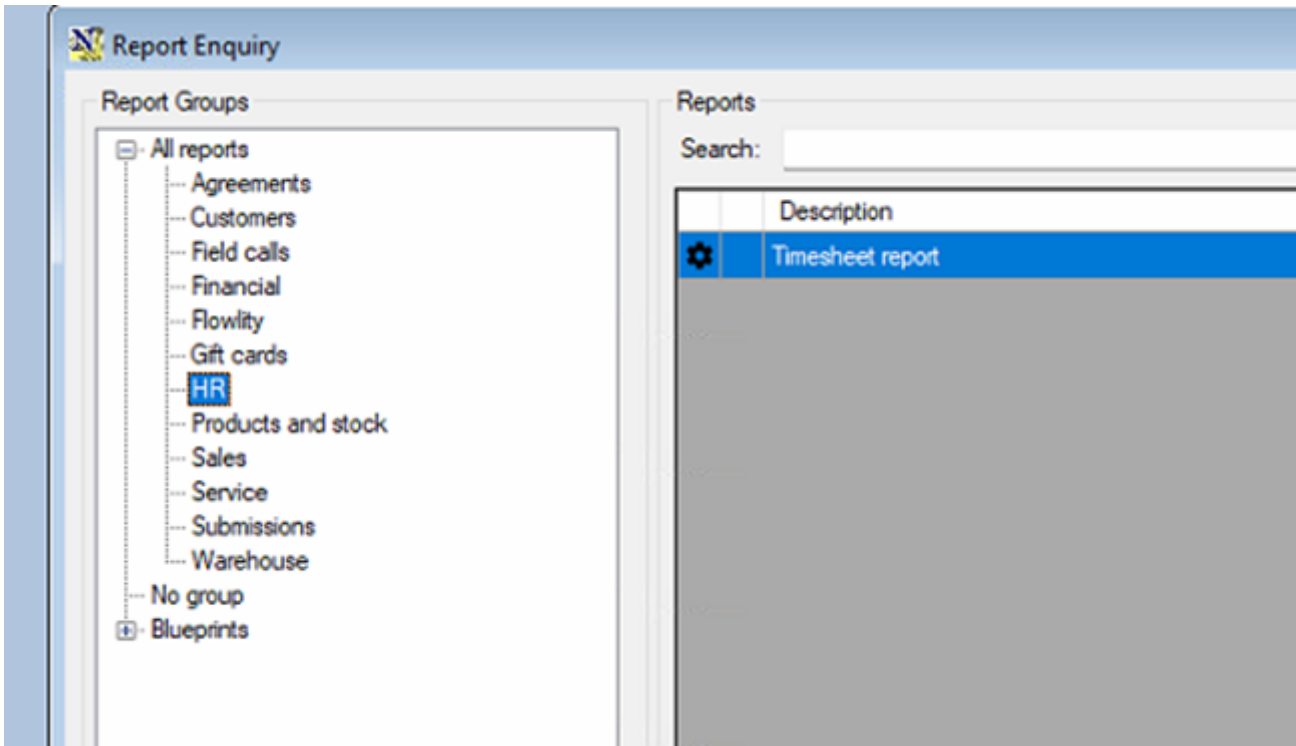
- Click Approve or Decline

Select one of the requests from this list.

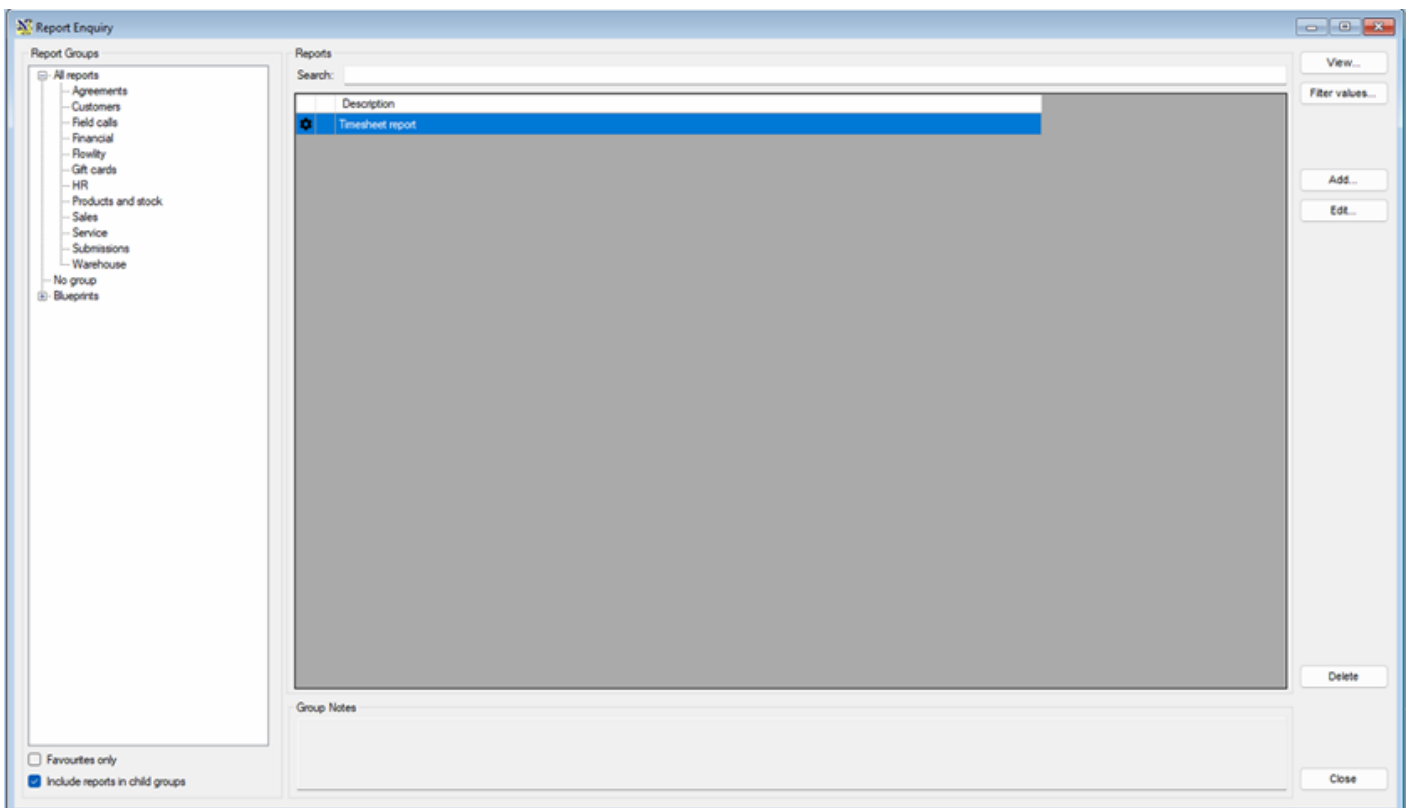
Reporting

You will find all reports for the HR Module in Under.

Reports > Additional Reports



Click on HR on the reports tree.



Created 2026-04-09 15:05:28 UTC by David Pinder
Updated 2026-04-09 15:28:04 UTC by David Pinder