**edays configuration checklist**

To help you make sure that you have configured all the key aspects of the system we have created the checklist below. This will ensure you are on the right track through the implementation of your new edays system. The configuration from each session should be completed ahead of each subsequent training session.

 **Training 1**

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| **Checklist** | **Yes/No or N/A** | **Useful Article(s)** |
| **Global** |  |  |
| Have you configured the password complexity on the global system settings? |  | [Password settings](https://support.e-days.com/support/solutions/articles/77000492588-system-setup-password-settings) |
| Have you setup the correct visibility controls on global system settings? |  | [Admin](https://support.e-days.com/support/solutions/articles/77000230950-filters-views-changing-the-admin-user-view-global-level), [Staff records](https://support.e-days.com/support/solutions/articles/77000230948-filters-views-changing-the-staff-records-user-view-global-level), [Calendar](https://support.e-days.com/support/solutions/articles/77000230945-filters-views-changing-the-calendar-user-view-global-level), [Reports](https://support.e-days.com/support/solutions/articles/77000230943-filters-views-changing-the-reporting-user-view-global-level) |
| Have you created additional email notifications to be sent to administrators? |  | [email notifications](https://support.e-days.com/support/solutions/articles/77000449719-additional-email-notification-configuration-global-level-) |
| Have you configured the Bradford Factor? |  |  |
| Have you added a link to your benefits or ERP system? |  |  |
| Have you set a retention period on data being stored for your company leavers? |  |  |
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| **Public holidays / Custom holidays** |  |  |
| Have all your public holidays been set up and assigned to the global/template rota pattern? |  | [Public holiday groups](https://support.e-days.com/support/solutions/articles/77000230182-public-holiday-setup-adding-a-new-public-holiday-group), [importing dates](https://support.e-days.com/support/solutions/articles/77000230167-public-holiday-setup-adding-dates-via-import-feed), [adding a new date](https://support.e-days.com/support/solutions/articles/77000230164-public-holiday-setup-adding-a-new-public-holiday-date), [apply on templates](https://support.e-days.com/support/solutions/articles/77000230297-rota-calendar-applying-public-holidays-to-a-template-rota) |
| Have all your custom days been set up and assigned to the global/template rota pattern? |  | [Custom days group](https://support.e-days.com/support/solutions/articles/77000230013-custom-days-adding-a-new-custom-days-group), [adding dates](https://support.e-days.com/support/solutions/articles/77000229990-custom-days-adding-dates-to-a-custom-days-group), [apply globally](https://support.e-days.com/support/solutions/articles/77000230290-assigning-custom-days-to-the-global-rota) or [on a template](https://support.e-days.com/support/solutions/articles/77000230296-assigning-custom-days-to-a-template-rota) |
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| **Entitlements** |  |  |
| Have you created any additional entitlement pots required for your organisation e.g., Volunteering Leave? |  | [New entitlement pot](https://support.e-days.com/support/solutions/articles/77000493758-entitlement-setup-creating-a-new-entitlement-pot) |
| Have you created any policies required for your organisation for additional entitlement to be accrued e.g. long service awards? |  | [Accrual policy setup](https://support.e-days.com/support/solutions/articles/77000230590-entitlement-setup-accrual-policy-setup), [long service example and configuration](https://support.e-days.com/support/solutions/articles/77000492269-long-service-award-example-and-configuration) |
| Have you enabled carry over (transfer) functionality and set any maximum limits on the number of days that can be carried over and/or set an expiry date for carry over as required? |  | [Manual v Automatic Carryover](https://support.e-days.com/support/solutions/articles/77000492233),[Global level carryover configuration](https://support.e-days.com/en/support/solutions/articles/77000481348) and [Template level carryover configuration](https://support.e-days.com/en/support/solutions/articles/77000481350) |
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| **Absence types** |  |  |
| Have all the absence types you need been added into the system and configured to your requirements, with the correct permissions? *Note that if you have created additional entitlement pots, you will need to set up an absence type for employees to spend that entitlement.* |  | [New absence type](https://support.e-days.com/support/solutions/articles/77000229974-absence-setup-adding-a-new-absence-type), [Visibility settings](https://support.e-days.com/support/solutions/articles/77000229959-changing-the-global-visibility-settings-for-an-absence-type), [Booking settings](https://support.e-days.com/support/solutions/articles/77000229940-absence-types-changing-the-global-booking-settings-for-an-absence-type), [Enable absence types on certain templates only](https://support.e-days.com/support/solutions/articles/77000229885-absence-types-global-absence-type-set-to-no-template-set-to-yes), [Min/Max notice period,](https://support.e-days.com/support/solutions/articles/77000229918-absence-setup-global-level-minimum-maximum-notice-period-restrictions) [Min/Max length](https://support.e-days.com/support/solutions/articles/77000229920-absence-types-setting-global-minimum-maximum-length-restrictions-for-an-absence-type), [Enable file attachments](https://support.e-days.com/support/solutions/articles/77000229922-absence-setup-global-level-file-attachment-settings), [adding](https://support.e-days.com/support/solutions/articles/77000229964-adding-new-defined-reasons-for-absence-types) and [assigning defined reasons](https://support.e-days.com/support/solutions/articles/77000229962-assigning-defined-reasons-to-an-absence-type) |
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| **Rotas** |  |  |
| Have all the rota patterns been configured for your staff?  |  | [Days rotas](https://support.e-days.com/support/solutions/articles/77000230295-rota-setup-adding-a-new-days-rota-pattern), [Hours rotas](https://support.e-days.com/support/solutions/articles/77000230294-rota-setup-adding-a-new-hours-rota-pattern), [Nights rotas](https://support.e-days.com/support/solutions/articles/77000230293-rota-setup-adding-a-new-nights-rota-pattern) |
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| **Overtime and TOIL** |  |  |
| Have all the Overtime and TOIL types required for your organisation been enabled/disabled for employees to record as needed? |  | [Adding a new type](https://support.e-days.com/support/solutions/articles/77000230145-overtime-toil-setup-adding-a-new-overtime-or-toil-type), [Booking settings](https://support.e-days.com/support/solutions/articles/77000230140-changing-the-global-booking-settings-for-an-overtime-and-toil-type), [Visibility settings](https://support.e-days.com/support/solutions/articles/77000230138-changing-the-global-visibility-settings-for-an-overtime-and-toil-type) |
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| **Buy and Sell Leave (if applicable)** |  |  |
| Are the relevant entitlement buy/sell request types set up and enabled as required for your organisation? |  | [Configuring Buying and Selling Holiday (Flex Leave)](https://support.e-days.com/support/solutions/articles/77000477027-configuring-buying-and-selling-holiday-flex-leave-) |
| Are any maximum limits you have on the number of days that can be bought/sold set on the system? |  |  |
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| **Alert groups** |  |  |
| Have you created all the alerts you would like to use in the system? |  | [Option Summary](https://support.e-days.com/support/solutions/articles/77000492071-alert-group-types-option-summary), [Adding a new alert group](https://support.e-days.com/support/solutions/articles/77000230041-adding-a-new-alert-group), [Adding a new absence alert](https://support.e-days.com/support/solutions/articles/77000230021-adding-a-new-absence-alert), [Assigning alert groups to an absence type](https://support.e-days.com/support/solutions/articles/77000230015-assigning-alert-groups-to-an-absence-type-global) |
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| **Templates** |  |  |
| Have you created all the user templates you require in edays? *Note: it is recommended that you have templates for each group of users that have different requirements from other users in the system e.g. a template for different countries or if some user groups have different long service rules to others.* |  | [New Template](https://support.e-days.com/support/solutions/articles/77000230587-user-templates-adding-a-new-template) |

**Training 2**

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| **Checklist** | **Yes/No or N/A** | **Useful Article(s)** |
| **Groups** |  |  |
| Have all your groups been created in the system and minimum staffing levels applied as required? |  | [New group type](https://support.e-days.com/support/solutions/articles/77000230090-groups-adding-a-new-group-type), [new group](https://support.e-days.com/support/solutions/articles/77000230097-groups-adding-a-new-group), [minimum staffing levels](https://support.e-days.com/support/solutions/articles/77000230090-groups-adding-a-new-group-type) |
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| **Custom filters** |  |  |
| For any staff who require user visibility outside of the standard options (my record, reportees, everyone, my team, direct reportees), have you created the relevant custom filters? |  | [Custom filter configuration](https://support.e-days.com/support/solutions/articles/77000230599-filters-views-custom-filter-configuration) |
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| **Users** |  |  |
| Have all the staff that will be using edays been added as users in the system? |  | [Adding a new User](https://support.e-days.com/support/solutions/articles/77000230905-users-adding-a-new-user) |
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| **Licenses** |  |  |
| Do you have sufficient user and leaver licenses in your edays system? |  | [User licenses](https://support.e-days.com/support/solutions/articles/77000230104-licenses-adding-user-licenses) and [leaver licenses](https://support.e-days.com/support/solutions/articles/77000230103-licenses-adding-leaver-licenses) |
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| **Entitlement balances** |  |  |
| Is the annual entitlement balance correct for all staff? |  | [Reviewing holiday entitlements](https://support.e-days.com/support/solutions/articles/77000230810-reviewing-holiday-entitlements),  |
| If using TOIL, do employees have the correct amount of days/hours book as time off?  |  | [Adding an overtime and TOIL record via the admin panel](https://support.e-days.com/support/solutions/articles/77000230209-overtime-toil-adding-an-overtime-and-toil-record) |
| Are the entitlement balances for any additional pots correct for your staff? |  | [Entitlement reports](https://support.e-days.com/support/solutions/articles/77000434384-reports-running-an-entitlement-report) , [Bulk updating Users' entitlement](https://support.e-days.com/support/solutions/articles/77000230863-import-entitlement-bulk-updating-users-entitlement), [Updating a user’s entitlement](https://support.e-days.com/support/solutions/articles/77000230858-updating-a-users-holiday-entitlement-advanced-entitlement) |
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| **Records** |  |  |
| Have you added all the absence data records you require for employees in the system? |  | [Adding](https://support.e-days.com/support/solutions/articles/77000230216-absences-adding-an-absence-record) and [updating](https://support.e-days.com/support/solutions/articles/77000230213-absences-updating-an-absence-record) absence records |
| Have you created all the carry over records you require for employees in the system? |  | [Adding](https://support.e-days.com/support/solutions/articles/77000230191-carryover-transfers-adding-a-transfer-carryover-record) and [updating](https://support.e-days.com/support/solutions/articles/77000230189-carryover-transfers-updating-a-transfer-carryover-record) carryover records |
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| **Employee directory (if applicable)** |  | [Configuring the Employee Directory](https://support.e-days.com/support/solutions/articles/77000488782-configuring-the-employee-directory) |
| Have you configured the user view for the employee directory as required? |  | [Changing the Directory User View - User level](https://support.e-days.com/support/solutions/articles/77000481172-filters-views-changing-the-directory-user-view-user-level) |
| Have you created the user document categories? |  |  |
| Have the role permissions been updated for the employee directory? |  |  |
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| **Document portal (if applicable)** |  | [Configuring the Document Portal](https://support.e-days.com/support/solutions/articles/77000486027-configuring-the-document-portal) |
| Have the role permissions been updated for the document portal? |  |  |
| Have you created the document portal document categories? |  |  |
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| **Time submission (if applicable)** |  |  |
| Have you configured the time submission settings based on your organisations’ needs? |  | [Time Submission](https://support.e-days.com/support/solutions/articles/77000472469-time-submission) |
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| **Working locations (if applicable)** |  |  |
| Have you created the list of all potential working locations in your edays system? |  | [Creating Working Locations](https://support.e-days.com/support/solutions/articles/77000523172-creating-working-locations) |
| Have you enabled the working locations feature globally for all staff or on the relevant template(s)? |  |  |
| Has the default working location been set globally or on the relevant template(s) as appropriate? |  |  |