



Absence Planning Module – Buttons & Controls



Display Selections: Filters, absence selection and other display settings.



View PLANNED absences.



View ACTUAL absences (i.e. absences from the DAILY Activity file).



View PLANNED Vs. Actual. This display is specifically designed to identify "irregularities" (e.g. refused vacation day that was taken as Sick leave).



View COVERAGE exceptions (understaffed days)



Calendar Selection



Absence Filter (Identical to "Absence Filter" in "Selections")



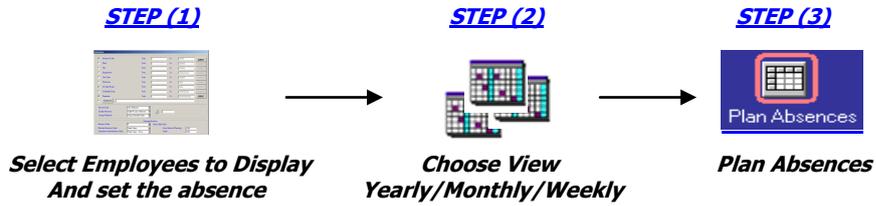
Plan Absences (Identical to "Right Click & Plan Absences")



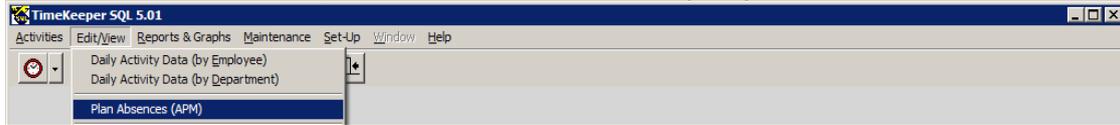
Show Absence Balance (Identical to "Right Click & absence Balance")



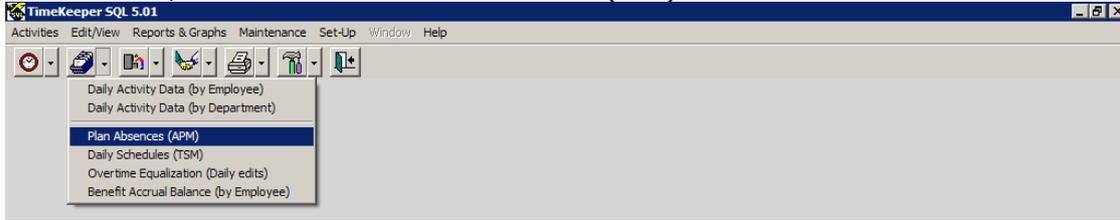
Plan absences in 3 easy Steps:



Load APM Browser via Edit/View Menu -> Plan Absences (APM)



or via the Edit/View TOOLMENU -> Plan Absences (APM)



Step 1: Select employees/absences to display

FILTERS

Selections

<input checked="" type="checkbox"/> Absence Code	From	<input type="text" value="0"/>	To	<input type="text" value="99999"/>	Select
<input type="checkbox"/> Plant	From	<input type="text" value="0"/>	To	<input type="text" value="999999"/>	Select
<input type="checkbox"/> Site	From	<input type="text" value="0"/>	To	<input type="text" value="999999"/>	Select
<input type="checkbox"/> Department	From	<input type="text" value="0"/>	To	<input type="text" value="9999999999"/>	Select
<input type="checkbox"/> Sort Code	From	<input type="text" value="0"/>	To	<input type="text" value="999999"/>	Select
<input type="checkbox"/> Profession	From	<input type="text" value="0"/>	To	<input type="text" value="9999"/>	Select
<input type="checkbox"/> Coverage Group	From	<input type="text" value="0"/>	To	<input type="text" value="9999"/>	Select
<input type="checkbox"/> Schedule Group	From	<input type="text" value="0"/>	To	<input type="text" value="9999999999"/>	Select
<input checked="" type="checkbox"/> Employee	From	<input type="text" value="0"/>	To	<input type="text" value="999999999999"/>	Select
<input type="checkbox"/> Expression	<input type="text"/>				

DISPLAY

Record Type:

Display Absence:

Sorting Profile No.:

PLAN ABSENCES

Planned Absence

Absence Code: VACATION PAID

Planned Absence Value: Hour Value for Planning:

Calculate Actual Absence Value: Value:



Upper section – Filters

Filter the employees and the absence codes to display in the Browser.

Employees are filtered based on Plant, Site, Department, Sort Code, Profession, Coverage Group, Schedule Group, individual employees and user-defined expressions (used for filtering based on additional employee-master fields that are not available in the above selection e.g. Rate Code, Seniority etc.

Absences are filtered based on the absence code selection. Users may (optionally) hide selected "system" absences as unauthorized absence/Not Scheduled and other (optional) absences as Late Entry and Early Exit.

Middle Section – Display

Record Type	Record Type selection loads the display i.e. View Planned, View Actual, View Planned vs. Actual & Coverage Exceptions.
Display absence	- <u>Table H color selection</u> : Retrieve the color from TableH - <u>User Color Selection</u> : Single color (user-defined) for all absences.
Sorting Profile number	Sort Employees based on pre-defined Sort Profile

Bottom Section – Plan Absences

Absence Code	Select the absence code for planning
Planned Absence Value (hours)	The number of hours taken per planned absence ("virtual usage") is taken into consideration when calculating the forecasted balance. The planned absence value can be either retrieved from the employee's daily standard or alternatively be set to a user-defined value as follows: - <u>Daily Standard</u> : The absence Value will be calculated according to the contract's Daily Standard - <u>Fixed Value</u> : The absence code Value is to be set in "Hour Value for planning".
Calculate Actual Absence Value	The ACTUAL absence value (hours) determines the total hours taken in the daily record (once the daily record is created). While normally the value for planning will be identical to the Actual value, APM enables specifying different values, for exceptional cases e.g. an employee was planned for half vacation day; If the does not arrive to work that day, he will be charged with a full day 8 hours ARIK SELF REMINDER CHECK EXAMPLE



Step 2: Choose view

APM Browser has four views and an easy to use [drill-down](#) between the views for zooming-in. The available views are [YEARLY VIEW](#), [MONTHLY VIEW](#), [WEEKLY VIEW](#) and [DAILY VIEW](#).

Yearly View (the supervisor views the entire year* on one screen)

* When multiple employees are selected, the supervisor must drill-down to the weekly level in order to view the employees and their associated absences.

Legend



Holidays and other non-standard days are highlighted (i.e. surrounded with a blue line) as an indication for the user according to the selected Calendars (in Calendar Selection). Holidays and non-standard days are day number 8 (and up) from TableB. In order to view the day-type, drill down to the MONTHLY view.



Additional Employees/Absences are available in this date. To view additional information, drill-down to the weekly /daily view.



In Monthly View: One of the planned absences (or more) in the specified date is not approved due to Negative Balance.

In Weekly View: The planned absence is not approved due to Negative Balance.



In Monthly View: One of the planned absences (or more) in the specified date has been approved (despite of the Negative Balance).

In Weekly View: The planned absence has been approved (despite of the Negative Balance).



There are multiple absences selected in the specified date. Some absences have been approved (despite of the Negative Balance) and some absences have not. (Available in the Monthly View only).



Monthly View (the supervisor views selected month* on one screen)

* When multiple employees are selected, the supervisor must drill-down to the weekly level in order to view the employees and the absences they are planned to.

Plan Absences
Table Display Display Mode Options Help

August 2005 Calendar

Absence Code 4 VACATION PAID , 5 VACATION UNPAID , 6 LEAVE OF ABSENCE , 7 SICK PAID , 8 SICK UNPAID , ...
 Department 5 Painting , 6 Assembly
 Employee 0 - 99999999999
 Planned Absence Code 4 VACATION PAID

Mo	Tu	We	Th	Fr	Sa	Su
1	2 + VACATION PAID	3 + VACATION PAID	4 + VACATION PAID	5 + VACATION PAID	6	7
8 + VACATION PAID	9 + VACATION PAID	10 + VACATION PAID	11 + VACATION PAID	12	13	14
15 + VACATION PAID	16 + VACATION PAID	17 + VACATION PAID	18 + VACATION PAID	19	20	21
22 + VACATION UNPAID	23 + VACATION PAID	24 + VACATION PAID	25 + VACATION PAID	26 + JURY DUTY PAID	27	28
29 + VACATION PAID	30 + VACATION PAID	31 + VACATION PAID				

Year Month Week Day

Weekly View (the supervisor views selected week on one screen)

The weekly view displays the selected employees and the planned absences. You may plan absences, delete planned absence(s), approve or disapprove absences for selected employees

Plan Absences
Table Display Display Mode Options Help

Week 35 22/08/2005 - 28/08/2005 Calendar

Planned Absence Code 4 VACATION PAID

	Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
Department 5 Painting							
1006 Burns Dave							
1016 MONROE JANICE		VACATION PAID	VACATION PAID	VACATION PAID			
1021 WATSON BRENDAN							
1036 SEINFELD TED	VACATION UNPAID	VACATION UNPAID					
1078 CLARK ARTHUR		VACATION PAID					
1129 CARTIER SHIRLEY	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID		
Department 6 Assembly							
1017 DOUGLAS TOWSEND							
1122 PERRICELLI JOANNE							
1138 MASTERS SAIRA							
1140 SWANSON NICHOLAS							

Year Month Week Day



Daily View (the supervisor views selected day on one screen)

The daily view displays the selected employees and the planned absences. Unlike the other views, this view does not allow to plan absences. It is strictly for display purposes only. The daily View provides the highest resolution (all possible details).

Department	Employee	Absence Code	Planned Absence Value	Hour Value for Planning	Calculate Actual Absence Value	Value	Planned Balance - Hours	Planned Balance - Days	Exceptions Planning
5 Painting	1016 MONROE JANICE	4 VACATION PAID	Daily		Fixed Value	0	25.00		
	1036 SEINFELD TED	5 VACATION UNPAID	Daily		Fixed Value	0			
	1078 CLARK ARTHUR	4 VACATION PAID	Daily		Fixed Value	0	76.52		
	1129 CARTIER SHIRLEY	18 JURY DUTY PAID	Daily		Fixed Value	0			

There are no values for "Jury Duty" and Unpaid Vacation" as both absences are not set for BA/Absence Tracking.



? Drill-Down between views (Optional):

Load the Yearly view and select August-25th (using the left click):

The screenshot shows the 'Plan Absences' application window. At the top, the year '2005' is selected in the 'From Month' dropdown and is circled. Below this, the user's profile information is displayed: Absence Code (4 VACATION PAID, 5 VACATION UNPAID, 6 LEAVE OF ABSENCE, 7 SICK PAID, 8 SICK UNPAID), Department (5 Painting, 6 Assembly), Employee (0 - 9999999999), and Planned Absence Code (4 VACATION PAID). The main area contains a grid of 12 monthly calendars. The August calendar is highlighted, and the date 25 is circled within it. The interface includes a sidebar with various icons for navigation and a bottom status bar with 'Year', 'Month', 'Week', and 'Day' options.

Now choose the "Monthly View" in order to drill-down to August:

The screenshot shows the 'Plan Absences' application window with the view set to 'Monthly'. The date 'August 2005' is selected in the top navigation bar and is circled. The main area displays a detailed calendar for August. The days are color-coded: days 1-7 are purple; days 8-14 are light blue with 'VACATION PAID' text; days 15-21 are light blue with 'VACATION PAID' text; days 22-28 are light blue with 'VACATION UNPAID' text; and day 26 is yellow with 'JURY DUTY PAID' text. The interface includes a sidebar with various icons for navigation and a bottom status bar with 'Year', 'Month', 'Week', and 'Day' options.



In order to drill-down to the weekly level, select the 25th:

The screenshot shows the 'Plan Absences' application window. The top menu bar includes 'Table', 'Display', 'Display Mode', 'Options', and 'Help'. The main area displays a calendar for August 2005. The date 25th is circled. The calendar shows various absence types: 'VACATION PAID' (cyan), 'VACATION UNPAID' (pink), and 'JURY DUTY PAID' (yellow). The left sidebar contains navigation options like 'View Planned', 'View Actual', and 'View Planned and Actual'. The bottom of the window has tabs for 'Year', 'Month', 'Week', and 'Day'.

Now choose the "Weekly View" in order to drill-down to the week of the 25th:

The screenshot shows the 'Plan Absences' application window in 'Weekly View'. The top menu bar is the same. The main area displays a weekly view for the week of 22/08/2005 to 28/08/2005. The date 25th is circled. The weekly view shows absence types for each day: 'VACATION PAID' (cyan), 'VACATION UNPAID' (pink), and 'JURY DUTY PAID' (yellow). The left sidebar contains navigation options like 'View Planned', 'View Actual', and 'View Planned and Actual'. The bottom of the window has tabs for 'Year', 'Month', 'Week', and 'Day'.



In order to drill-down to the DAILY level, select the 25th:

Plan Absences
Table Display Display Mode Options Help

Week 35 22/08/2005 - 28/08/2005 Calendar

Planned Absence Code 4 VACATION PAID

	Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
Department 5 Painting							
1006 Burns Dave							
1016 MONROE JANICE		VACATION PAID	VACATION PAID	VACATION PAID			
1021 WATSON BRENDAN							
1036 SEINFELD TED	VACATION UNPAID	VACATION UNPAID					
1078 CLARK ARTHUR		VACATION PAID					
1129 CARTIER SHIRLEY	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID		
Department 6 Assembly							
1017 DOUGLAS TOWSEND							
1122 PERRICELLI JOANNE							
1138 MASTERS SAIRA							
1140 SWANSON NICHOLAS							

Year Month Week Day

Now choose the "DAILY VIEW" in order to drill-down to August-25th:

Plan Absences
Table Display Display Mode Options Help

25/08/2005 Calendar

Department	Employee	Absence Code	Planned Absence Value	Hour Value for Planning	Calculate Actual Absence Value	Value	Planned Balance - Hours	Planned Balance - Days	Exceptions Planning
5 Painting	1016 MONROE JANICE	4 VACATION PAID	Daily		Fixed Value	0	25.00		
	1129 CARTIER SHIRLEY	18 JURY DUTY PAID	Daily		Fixed Value	0			



Important! While the above example illustrates full drill-down cycle Year/Month/Week/Day, you may dynamically drill-down from Yearly to Monthly/Weekly/Daily (directly) by selecting the day and choosing the required view.

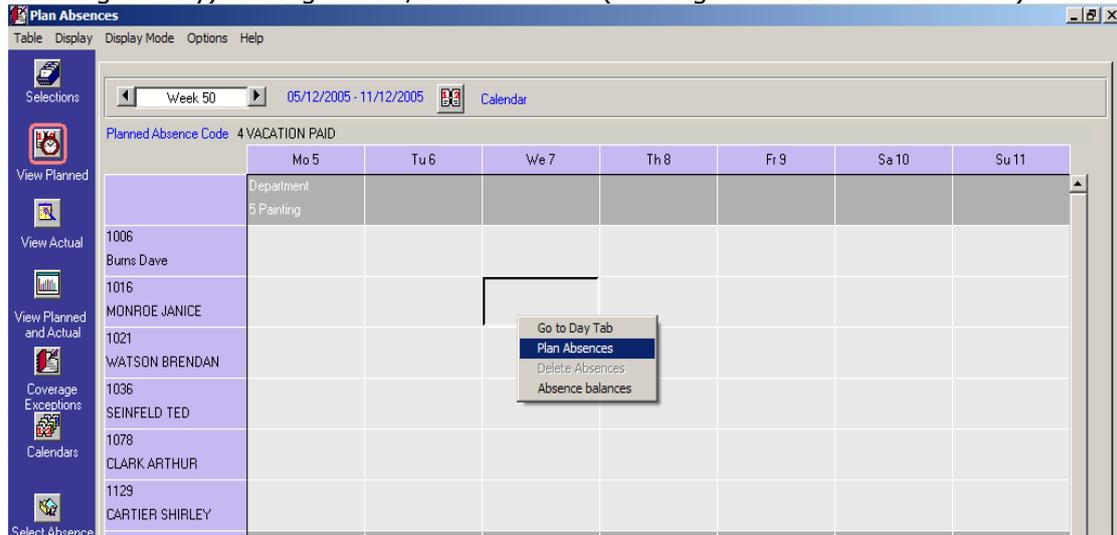


Step 3: Plan Absences

Using APM Browser you can [Plan Absence\(s\)](#), [Delete Planned Absences](#), [Approve & Disapprove absence\(s\)](#), [view forecasted balance](#) and [reschedule absence\(s\)](#).

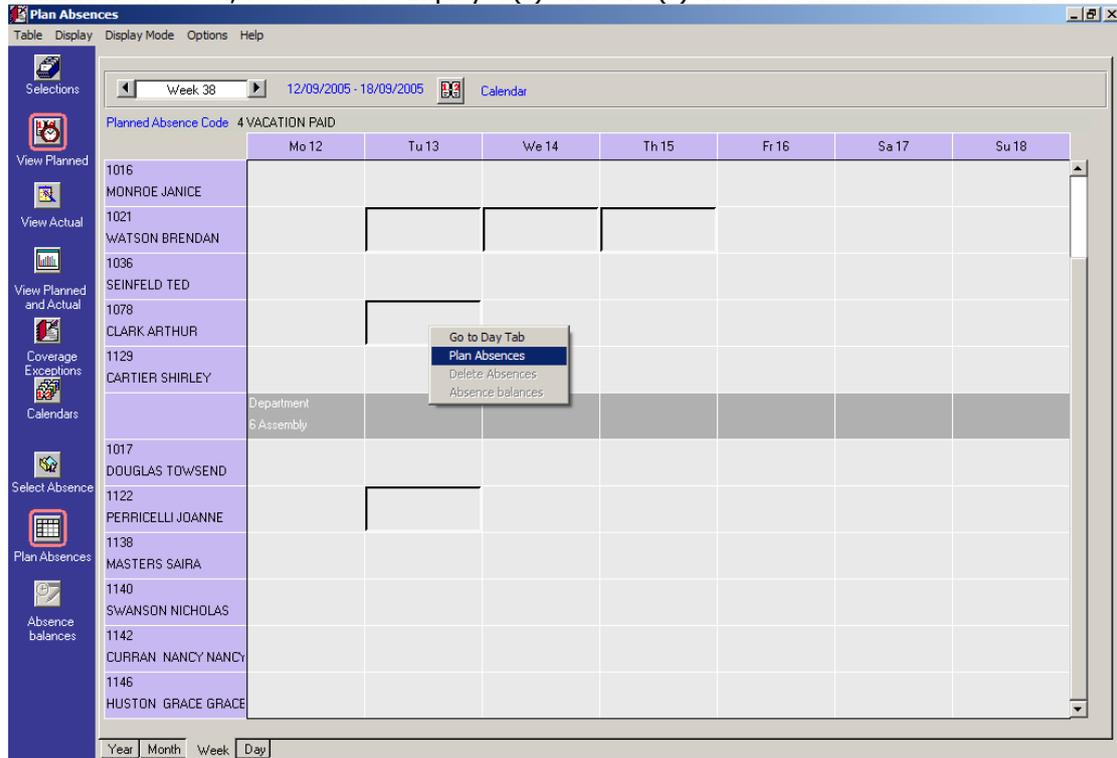
3.1 Plan Absence(s) for a single employee

Planning Absences is available from ALL VIEWS (excluding the DAILY view) by Left Click (for selecting the day) and Right click / Plan Absences (or using the Plan Absences button):



3.2 Plan Absence(s) for multiple employees

Multiple records selection (i.e. multiple days for multiple employees) is available only in the weekly screen. Multiple selections are available by individual-selection or group-selection. For individual selection, left-click the employee(s) and date(s) and choose "Plan Absences":

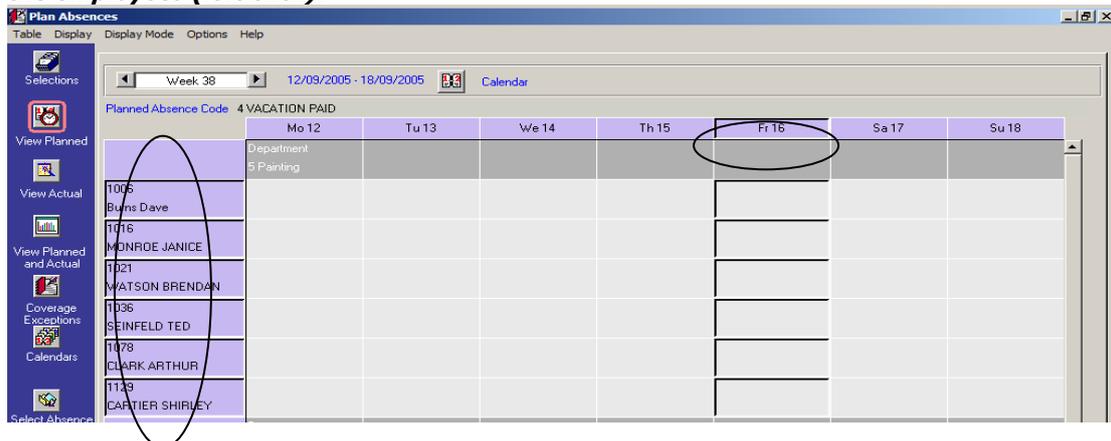




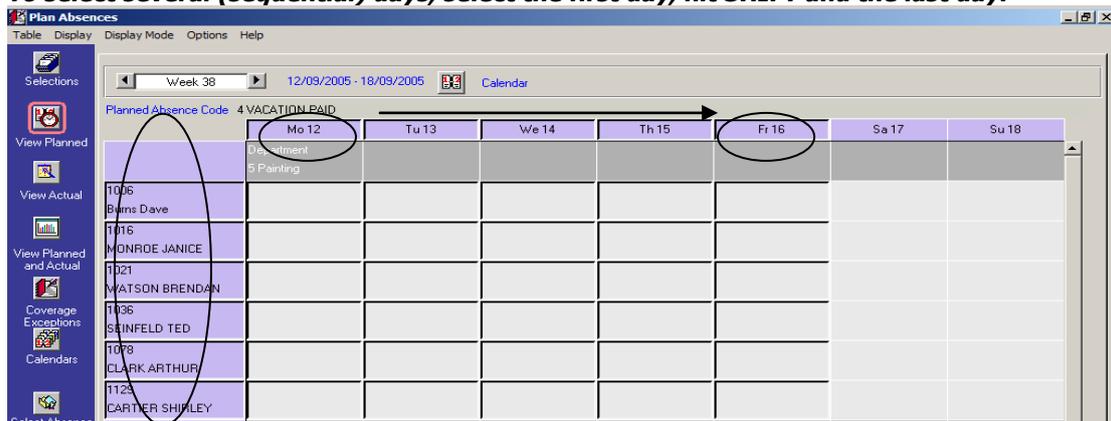
Group Selection:

Group selection allows selecting a specific day (or multiple days) for selected employees i.e. Friday September-16th for all selected employees, Wednesday September-14th & Friday September-16th for Janice (Employee 1006), Douglas (Employee 1017) and Nicholas (Employee 1140) etc.

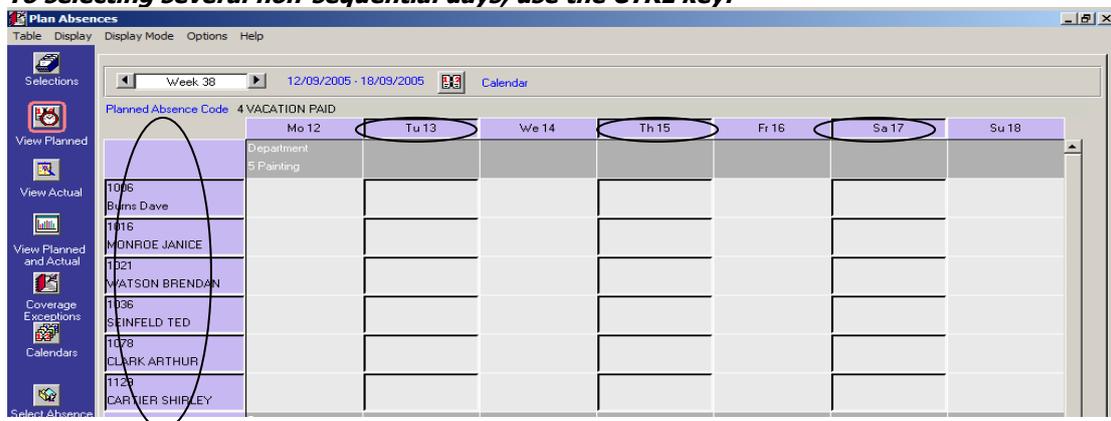
To select a specific day for multiple employees, choose the day (by left click) and the select the employees (left click):



To select several (sequential) days, select the first day, hit SHIFT and the last day:



To selecting several non-sequential days, use the CTRL key:



ONCE THE EMPLOYEES/DATES WERE SELECTED – RIGHT CLICK & PLAN ABSENCES (OR USE THE PLAN ABSENCE BUTTON)



3.3 Group Scheduling via MONTHLY and YEARLY views

Unlike the WEEKLY display that displays selected employees for a group of dates, the Yearly and the monthly views display the entire group for one day. In order to plan an absence for the selected group (i.e. previously selected in "Selections"), select the day (left click) and choose right click – Plan Absences (or use the Plan Absences Button):

The screenshot shows the 'Plan Absences' application window. At the top, there are menu options: Table, Display, Display Mode, Options, Help. Below the menu is a toolbar with a year selector set to 2005 and buttons for 'From Month', 'Year Back', and 'Year Forward'. The main area displays a grid of months from January to December. A context menu is open over the 17th of November, with 'Plan Absences' highlighted. The sidebar on the left contains icons for 'Selections', 'View Planned', 'View Actual', 'View Planned and Actual', 'Coverage Exceptions', 'Calendars', 'Select Absence', 'Plan Absences', and 'Absence balances'.

Or (using the MONTHLY view):

The screenshot shows the 'Plan Absences' application window in 'Calendar' view for October 2005. The main area displays a grid of days for the month. Two days, the 11th and 21st, are marked with a blue box and labeled 'VACATION PAID'. A context menu is open over the 11th, with 'Plan Absences' highlighted. The sidebar on the left contains icons for 'Selections', 'View Planned', 'View Actual', 'View Planned and Actual', 'Coverage Exceptions', 'Calendars', 'Select Absence', 'Plan Absences', and 'Absence balances'.



Getting Results

Plan Absences

Table Display Display Mode Options Help

Week 41 03/10/2005 - 09/10/2005 Calendar

Planned Absence Code 4 VACATION PAID

	Mo 3	Tu 4	We 5	Th 6	Fr 7	Sa 8	Su 9
Department	5 Painting						
1006 Burns Dave					VACATION PAID		
1016 MONROE JANICE					VACATION PAID		
1021 WATSON BRENDAN					VACATION PAID		
1036 SEINFELD TED					VACATION PAID		
1078 CLARK ARTHUR					VACATION PAID		
1129 CARTIER SHIRLEY					VACATION PAID		
Department	6 Assembly						
1017 DOUGLAS TOWSEND					VACATION PAID		
1122 PERRICELLI JOANNE					VACATION PAID		
1138 MASTERS SAIRA					VACATION PAID		
1140 SWANSON NICHOLAS					VACATION PAID		

Year Month Week Day



Planning Absence(s) for Multiple Dates using APM's DRAG & DROP functionality

Date range Selection is available by Drag-and-Drop in both* YEARLY and MONTHLY view as follows:

(a) Select the start date (By left Click)

The screenshot shows the 'Plan Absences' window for the year 2005. The interface includes a menu bar (Table, Display, Display Mode, Options, Help), a toolbar with navigation buttons (From Month, Year Back, Year Forward), and a sidebar with various function icons. The main area displays a 12-month calendar grid. The employee information is: Absence Code: 4 VACATION PAID, 5 VACATION UNPAID, 6 LEAVE OF ABSENCE, 7 SICK PAID, 8 SICK UNPAID; Department: 5 Painting, 6 Assembly; Employee: 0 - 9999999999; Planned Absence Code: 4 VACATION PAID. In the November calendar, the date '21' is circled in red, indicating it has been selected as the start date.

(b) "Drag" your selection and "Drop" it on the End date (By left Click)

This screenshot is identical to the one above, but with a red oval drawn around the date range from November 21 to November 25. This indicates that the user has dragged the selection from the start date to the end date to define a range of absences.

(c) Right Click and Select Plan Absences

* The Drag & Drop Functionality is the WEEKLY view is used for [rescheduling absence\(s\)](#). For further details on Planning absence(s) for a date-range in the weekly view, [see section 3.2 under Group selection](#).



Important!

-  The YEARLY and the MONTHLY view display multiple employees in one date. Since a day is represented in a single cell, the display can "only" flag when there is an occurrence (one or more). In order to identify which employees are associated with the absence, drill-down to WEEKLY (or DAILY) level.

-  The YEARLY and the MONTHLY views may reflect specific single employee data, as long as a single employee is selected under "Selections".

-  Absence Planning enables planning future absence only. APM does not allow planning absences for previous dates (dates prior to the current server-system date).



3.4 Real-time alerts in APM

APM Browser provides real-time alerts in the following scenarios:

3.4.1 Insufficient forecasted balance

APM performs "virtual" calculation of employees' forecasted balance as in accordance with requested future dates. The forecasted Balances are calculated based on actual corporate Benefit Policies (Absence Tracking Module and/or Benefit Accrual Module).

When the forecasted balance is insufficient, APM Browser provides real-time alert. The real-time alerts are prompted only for absences that are set to BA, where the absence code is set to alert upon negative balances.

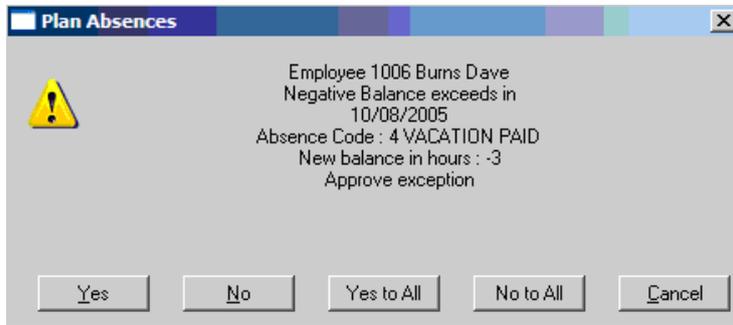
Step-by-step illustration

According to Dave's Policy (i.e. seniority based policy), Dave is entitled to 5 Vacation hours per pay-period (Bi-Weekly). Hence, by August 8th, Dave's forecasted Balance will be 21 hours as follows:

*Current Balance (based on period #15): 11.00 Hours +
Forecasted Accrual for period #16/2005: 5.00 Hours +
Forecasted Accrual for period #17/2005: 5.00 Hours*

Total forecasted for Period #18/2005: 21.00 Hours

Dave has requested a 3-day Vacation from his supervisor (August 8th, 9th and 10th). When planning the 3-day vacation, the system will alert on Aug-10th as the employee "hits" negative balance (3 days require 24.00 vacation hours. Dave has only 21.00 available; hence he is 3.00 hours short):



Approve & Disapprove absences:

- Approve VACATION PAID for 10/8/2005 (despite the negative balance).
- Do not approve VACATION PAID for 10/8/2005 (because of the negative balance)
- Approve VACATION PAID for ALL SELECTED DATES (despite the negative balance).
- Do not approve VACATION PAID ALL SELECTED DATES
- Cancel the planned absences



Absences that have been approved will be flagged as an approved exception



Absences that have not been approved will be flagged as NOT APPROVED



Once the absence has been approved (or left unapproved), the supervisor can change the status (Approve to Disapprove vice versa) by right click & Disapprove (or approve if the absence is not approved).

Planned Absence Code	Mo 8	Tu 9	We 10	Th 11	Fr 12	Sa 13	Su 14
Department 5 Painting							
1006 Burns Dave	VACATION PAID	VACATION PAID	VACATION PAID				
1016 MONROE JANICE							
1021 WATSON BRENDAN							
1036 SEINFELD TED							
1078 CLARK ARTHUR							
1129 CARTIER SHIRLEY							
Department 6 Assembly							
1017 DOUGLAS TOWSEND							
1122 PERRICELLI JOANNE							
1138 MASTERS SAIRA							
1140 SWANSON NICHOLAS							



3.4.2 Under coverage

The Coverage functionality has been designed to alert the supervisor that s/he is understaffed (on a specific day) and s/he may need to reconsider planning the absence and suggest alternate dates.

The coverage can be based on department, profession, team or even individuals (from separate departments) with a certain field of expertise.

Step-by-Step illustration

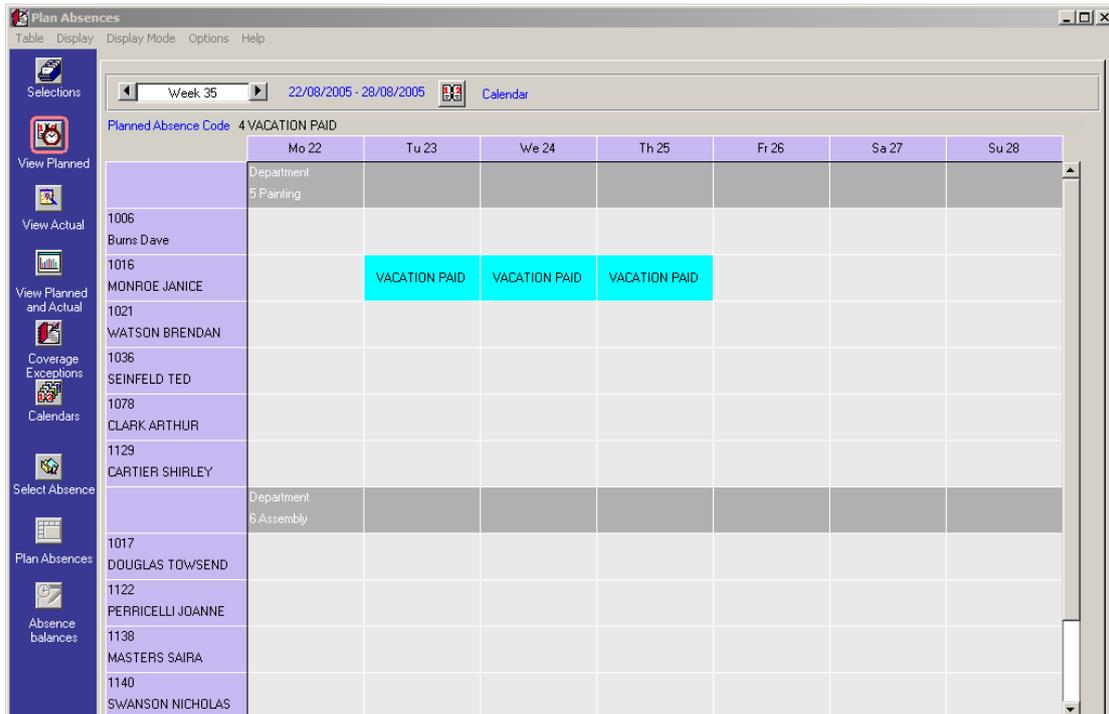
ABC Corporation has recently purchased APM. In ABC Corporation, coverage groups are set to department (hence every department has its own staffing standards).

John (one of the supervisors in the company) has three departments under his supervision: Electrical, Painting and Assembly. There are (6) employees in the Electrical Department, (5) employees in the Painting Department and (6) employees in Assembly.

From an operational perspective, the company requires at least (2) employees in the Electrical Department, (2) employees in the Painting Department and (4) employees in Assembly:

Department	Total Employees	Minimum employees Required (per day)
Dept 3 – Electrical	6	2
Dept 5 – Painting	5	2
Dept 6 – Assembly	6	4

(1) In January-2005, Janice (Employee #1016) requested 3 vacation days in August. John (her supervisor) approved her Vacation and updated the system accordingly:





(2) During March-2005, Shirley (Employee #1129) was selected for Jury-Duty for the entire week of August-22nd. John (Shirley's supervisor) approved the absence and entered the required information into the APM Browser:

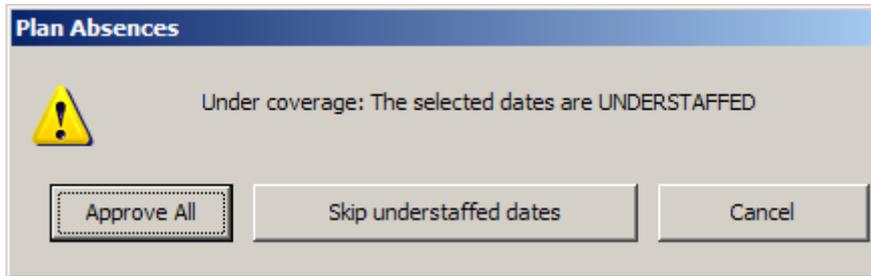
Planned Absence Code 18 JURY DUTY PAID		Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
Department	5 Painting							
1006	Burns Dave							
1016	MONROE JANICE		VACATION PAID	VACATION PAID	VACATION PAID			
1021	WATSON BRENDAN							
1036	SEINFELD TED							
1078	CLARK ARTHUR							
1129	CARTIER SHIRLEY	JURY DUTY PAID						
Department	6 Assembly							
1017	DOUGLAS TOWSEND							
1122	PERRICELLI JOANNE							
1138	MASTERS SAIRA							
1140	SWANSON NICHOLAS							

(3) In the beginning of July, Ted asked to take two days off (Monday August 22nd and Tuesday August-23rd). Since Ted cashed-out his vacation hours, he requested taking Unpaid Vacation on these dates. John (Ted's supervisor) approved his Vacation and updated the system accordingly:

Planned Absence Code 5 VACATION UNPAID		Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
Department	5 Painting							
1006	Burns Dave							
1016	MONROE JANICE		VACATION PAID	VACATION PAID	VACATION PAID			
1021	WATSON BRENDAN							
1036	SEINFELD TED	VACATION UNPAID	VACATION UNPAID					
1078	CLARK ARTHUR							
1129	CARTIER SHIRLEY	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID		
Department	6 Assembly							
1017	DOUGLAS TOWSEND							
1122	PERRICELLI JOANNE							
1138	MASTERS SAIRA							
1140	SWANSON NICHOLAS							



(4) On July-14th, Arthur requested taking Monday (August-23^d) off. Under normal circumstances (i.e. without having the APM) John would have approved his vacation. The APM Browser however, alerts the supervisor that he is understaffed that day:



The Supervisor therefore has three options:

APPROVE ALL Approve the day off anyway i.e. regardless of the fact that he is understaffed that day.

SKIP UNDERSTAFFED DATES When planning an absence for several days and/or several employees; this option enables planning absences without causing coverage/staffing problem.

In this case, since the supervisor planned Vacation "only" for a single employee for a one day – choosing this option will cancel the planning.

CANCEL Cancel planning for the selected employee(s) and Date/(s)

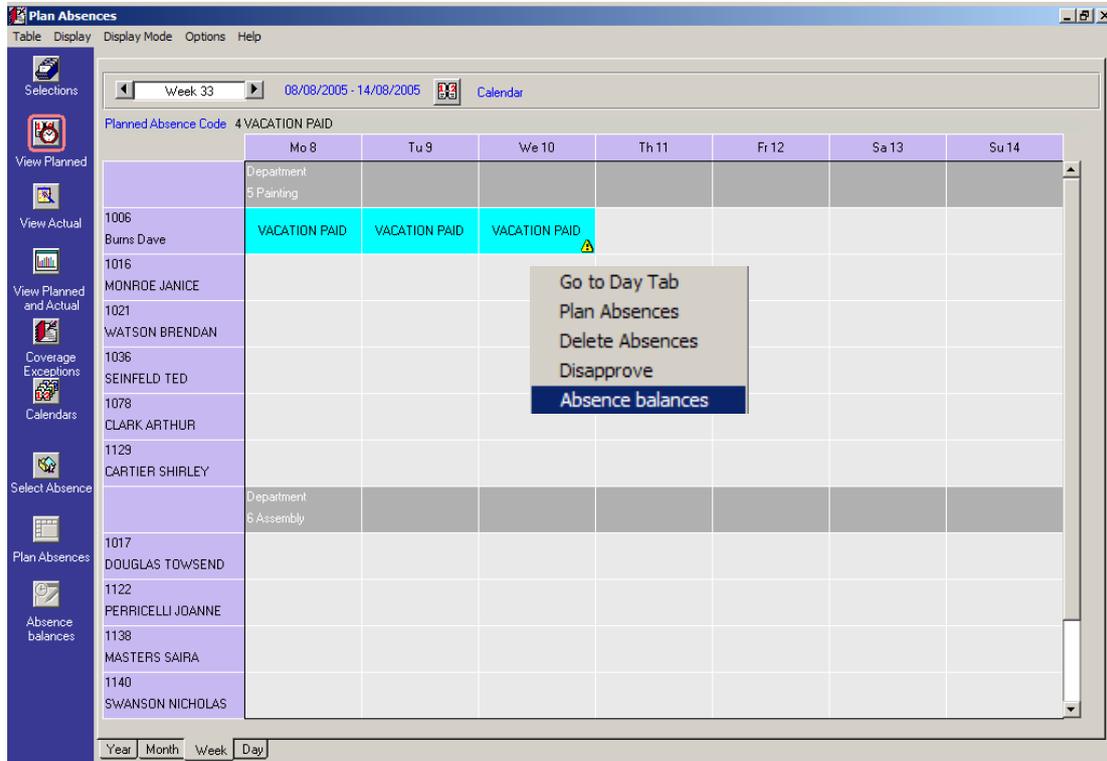
Once "Approve All" is selected the Vacation day is scheduled in the Browser:

Planned Absence Code 4 VACATION PAID		Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
1006	Department 5 Painting							
Burns Dave								
1016			VACATION PAID	VACATION PAID	VACATION PAID			
MONROE JANICE								
1021								
WATSON BRENDAN								
1036								
SEINFELD TED		VACATION UNPAID	VACATION UNPAID					
1078								
CLARK ARTHUR			VACATION PAID					
1129								
CARTIER SHIRLEY		JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID	JURY DUTY PAID		
Department 6 Assembly								
1017								
DOUGLAS TOWSEND								
1122								
PERRICELLI JOANNE								
1138								
MASTERS SAIRA								
1140								
SWANSON NICHOLAS								



3.5 View the forecasted Absence Balance

Viewing the forecasted absence balance is available by Right Click & Absence Balances or using the Absence Balance icon. Absence Balance functionality is available ONLY in the WEEKLY view.



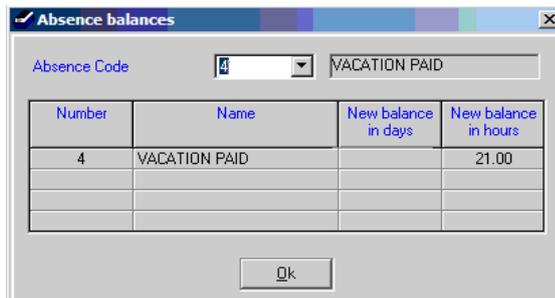
How does the "Virtual" calculation works?

According to Dave's Policy (seniority based policy), Dave is entitled to 5 Vacation hours per pay-period (Bi-Weekly). Hence, by August 8th, Dave's forecasted Balance will be 21 hours as follows:

*Current Balance (based on period #15): 11.00 Hours +
Forecasted Accrual for period #16/2005: 5.00 Hours +
Forecasted Accrual for period #17/2005: 5.00 Hours*

Total forecasted for Period #18/2005: 21.00 Hours

The APM Browser shows that on August 8th the employee's forecasted balance is 21 hours.





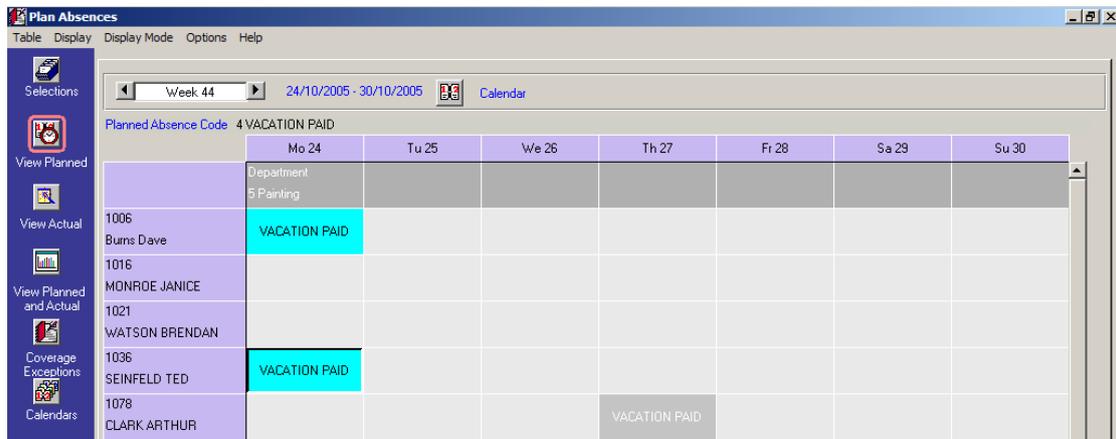
3.6 Reschedule Planned Absence

Reschedule Planned Absence is available by Drag & Drop (i.e. Weekly View only) or simply by deleting the absence and rescheduling it to a different date.

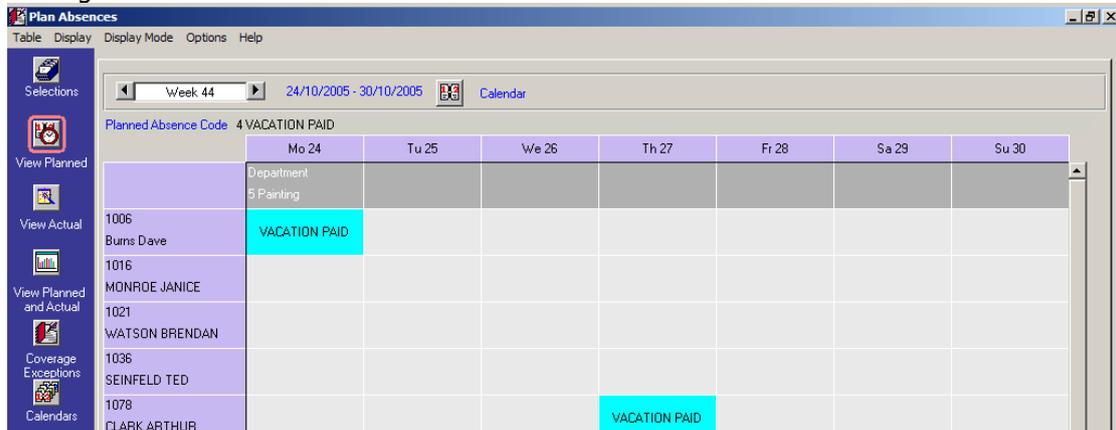
In order to use the Drag & Drop feature in the weekly view, Load the APM Browser, select the Weekly view and choose the absence that needs to be rescheduled:



Once the Absence is selected, simply "drag" the absence and drop it in a different date (or even a different employee!):



Getting results:





3.7 Delete Planned absence(s)

Deleting Planned Absence is available by Right click & Delete absence(s) (Available in both MONTHLY & WEEKLY views) or simply by rescheduling a different absence in the same date (or date-range).

The screenshot shows the 'Plan Absences' application window. The interface includes a menu bar (Table, Display, Display Mode, Options, Help), a toolbar with icons for Selections, View Planned, View Actual, View Planned and Actual, Coverage Exceptions, Calendars, Select Absence, Plan Absences, and Absence balances. The main area displays a weekly calendar for Week 44, starting on Monday, October 24, 2005, and ending on Sunday, October 30, 2005. The calendar is organized into rows by employee and columns by day. A 'VACATION PAID' entry is highlighted in cyan for employee CLARK ARTHUR on Thursday, October 27th. A context menu is open over this entry, showing options: 'Go to Day Tab', 'Plan Absences', 'Delete Absences', and 'Absence balances'. The 'Delete Absences' option is highlighted in blue. The employee list on the left includes: Burns Dave (1006), MONROE JANICE (1016), WATSON BRENDAN (1021), SEINFELD TED (1036), CLARK ARTHUR (1078), CARTIER SHIRLEY (1129), DOUGLAS TOWSEND (1017), PERRICELLI JOANNE (1122), MASTERS SAIRA (1138), and SWANSON NICHOLAS (1140). The department for Burns Dave is '5 Painting' and for Cartier Shirley is '6 Assembly'.

Planned Absence Code	Mo 24	Tu 25	We 26	Th 27	Fr 28	Sa 29	Su 30
Department 5 Painting							
1006 Burns Dave	VACATION PAID						
1016 MONROE JANICE							
1021 WATSON BRENDAN							
1036 SEINFELD TED							
1078 CLARK ARTHUR				VACATION PAID			
1129 CARTIER SHIRLEY							
Department 6 Assembly							
1017 DOUGLAS TOWSEND							
1122 PERRICELLI JOANNE							
1138 MASTERS SAIRA							
1140 SWANSON NICHOLAS							



4. View Actual Absences

The ACTUAL Absences option has (i.e. absences from the DAILY Activity file) has been designed to allow supervisors viewing actual absences using the same drill-down views, tools & filters.

5. View Planned Vs. Actual

View Planned vs. Actual display is specifically designed to identify "irregularities" (e.g. refused vacation day that was taken as Sick leave).

Example

- Dave has requested 5 days off, from November 21st to November 25th.
- His Supervisor has decided to approve "only" 3 vacation days due to Dave's forecasted negative Balance, and therefore the supervisor scheduled 3 days @ Vacation Paid and 2 days @ Vacation unpaid

Planned Absence Code	Mo 21	Tu 22	We 23	Th 24	Fr 25	Sa 26	Su 27
Department	5 Painting						
1006 Burns Dave	VACATION PAID	VACATION PAID	VACATION PAID	VACATION UNPAID	VACATION UNPAID		
1016 MONROE JANICE							
1021 WATSON BRENDAN							
1036 SEINFELD TED							

- In November, Dave took the 3 Vacation days and called-in sick on the 24th and the 25th

Date	Day Type	Absence Code	Contract	In 1	Out 1	In 2	Out 2	Paid Attn	Paid Abs.	Over Time	REG HRS	O/T 150%	O/T 200%	Banked OT	Pay OT	Unpaid O/T	Unpaid Abs
21/11/2005	1 Mc	4 VACATION PAID	10 Hourly I	:	:	:	:		8.00		8.00						
22/11/2005	2 Tu	4 VACATION PAID	10 Hourly I	:	:	:	:		8.00		8.00						
23/11/2005	3 Wi	4 VACATION PAID	10 Hourly I	:	:	:	:		8.00		8.00						
24/11/2005	4 Th	7 SICK PAID	10 Hourly I	:	:	:	:		8.00		8.00						
25/11/2005	5 Fr	7 SICK PAID	10 Hourly I	:	:	:	:		8.00		8.00						

- Using the Planned Vs. Actual display, the supervisor can identify these irregularities:

Planned Absence Code	Mo 21	Tu 22	We 23	Th 24	Fr 25	Sa 26	Su 27
Department	5 Painting						
1006 Burns Dave	VACATION PAID	VACATION PAID	VACATION PAID	SICK PAID	SICK PAID		
1016 MONROE JANICE							
1021 WATSON BRENDAN							
1036 SEINFELD TED							



6. Coverage Exceptions

In addition to the real-time under-coverage alerts engine, APM's "Coverage Exceptions" screen is specifically designed to easily identify coverage exceptions, using the same drill-down views, tools & filters:

Yearly View (the supervisor can see all the under-coverage exceptions on one screen)

Plan Absences
Table Display Display Mode Options Help

2005 From Month Year Back Year Forward

Absence Code: 4 VACATION PAID, 5 VACATION UNPAID, 6 LEAVE OF ABSENCE, 7 SICK PAID, 8 SICK UNPAID, ...
 Department: 5 Painting, 6 Assembly
 Employee: 0 - 99999999999
 Planned Absence Code: 4 VACATION PAID

Month	Mo	Tu	We	Th	Fr	Sa	Su
January						1	2
February	1	2	3	4	5	6	
March	1	2	3	4	5	6	
April	4	5	6	7	8	9	10
May	2	3	4	5	6	7	8
June	6	7	8	9	10	11	12
July	4	5	6	7	8	9	10
August	1	2	3	4	5	6	7
September	5	6	7	8	9	10	11
October	3	4	5	6	7	8	9
November	7	8	9	10	11	12	13
December	5	6	7	8	9	10	11

Year Month Week Day

(Drill-down to) Monthly View

Plan Absences
Table Display Display Mode Options Help

August 2005 Calendar

Absence Code: 4 VACATION PAID, 5 VACATION UNPAID, 6 LEAVE OF ABSENCE, 7 SICK PAID, 8 SICK UNPAID, ...
 Department: 5 Painting, 6 Assembly
 Employee: 0 - 99999999999
 Planned Absence Code: 4 VACATION PAID

Mo	Tu	We	Th	Fr	Sa	Su
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				

Year Month Week Day



The monthly view (similar to the yearly view) enables identifying the understaffed days. In order to identify by how many employees the coverage is short (by coverage group), drill-down to the weekly (or the daily) view:

(Drill-down to) Weekly View

Planned Absence Code	4 VACATION PAID						
	Mo 22	Tu 23	We 24	Th 25	Fr 26	Sa 27	Su 28
Department 5 Painting	1	-1	1	1	2		
Department 6 Assembly	2	2	2	2	2		

The weekly view displays the coverage-exceptions in Yellow. It also specifies the number of people missing per day in Red (i.e. on August 23rd, we are one employee short). The rest of the days (where there are no coverage exceptions) show how many employees can (potentially) be planned without being understaffed.

(Drill-down to) Daily View

Department	Total Employees in Group	Minimal Coverage	Total Employees Planned	Employees "Left" for Planning
5 Painting	6	3	4	-1
6 Assembly	6	4	0	2

The Daily View displays more details than the Yearly/Monthly and Weekly views: It shows the coverage groups, how many employees are assigned to each group, what is the minimal coverage required, how many employees were planned and how many employees are "left" for planning (how many absences can be scheduled without causing under-coverage problem).



7. Module Reports

7.1 Planned Absences by employee (Menu entry: RAPMEMP)

Purpose: Displays planned absences by employee sorted by date

Report Layout:

DEMO SYSTEM							
APM - Scheduled Absences Report from 01.05.2005 till 31.05.2005				Page No. 1 Production Date.. 01/06/2005 Production Time.. 17:06			
Plant: 1 TimeTECH		Site: 1 *		Department: 1 Management			
Employee: 1119 SHEPPERD MATT MATT							
Date	Day	Absence Code	Absence Value For Scheduling	Hours For Sched.	Actual Absence Value Calculation	Value For Actual Calc.	Schedule Code
24/05/2005	We	28 STAT HOLIDAY	Daily Standard		Based on Contract		Valid
28/05/2005	Su	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
Department: 3 Electrical Employee: 1023 JORDAN ANDREW ANDREW							
24/05/2005	We	28 STAT HOLIDAY	Daily Standard		Based on Contract		Valid
27/05/2005	Sa	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
28/05/2005	Su	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
Employee: 1043 PARRA LUISA LUISA							
24/05/2005	We	28 STAT HOLIDAY	Daily Standard		Based on Contract		Valid
27/05/2005	Sa	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
28/05/2005	Su	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
Employee: 1133 SMITH JOSEPH JOSEPH							
24/05/2005	We	28 STAT HOLIDAY	Daily Standard		Based on Contract		Valid
28/05/2005	Su	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid
Employee: 1141 HILLMAN JAKE JAKE							
24/05/2005	We	28 STAT HOLIDAY	Daily Standard		Based on Contract		Valid
28/05/2005	Su	4 VACATION PAID	Fixed Value	4.00	Fixed Value - Hours	8.00	Valid

Report Selections:

APM - Planned Absences by Employee

File Date Plant Site Department Employee Sort Code Profession Absence Code Coverage Group Output Options Start Report

Date From 14/08/2005 To 14/08/2005

Plant 1 - 999999	Scheduled Absence Code All
Site 1 - 999999	Employees Sort By Number
Department 1 - 9999999999	Page Break on Plant
Employee 1 - 999999999999	Send Report To Screen
Sort Code 1 - 999999	
Profession 1 - 9999	
Absence Code 0 - 999	
Coverage Group 0 - 9999	

Number Of Copies 1



7.2 Planned Absences by Date (Menu entry: RAPMDATE)

Purpose: Displays planned absences by date (Day-Type)

Report Layout:

DEMO SYSTEM						
Scheduled Absences Report for 02/05/2005			Page No. 2		Production Date.. 01/06/2005	
Week Day: 1 Day Type: Monday			Production Time.. 17:36			
Plant: 1 TimeTECH		Site: 1 *		Department: 5 Painting		
Employee	Absence Code	Absence Value For Scheduling	Hours For Sched.	Actual Absence Value Calculation	Value For Actual Calc.	Schedule Code
1036 SEINFELD TED TED	4 VACATION	Daily Standard		Based on Contract		Valid
Department: 6 Assembly						
1017 DOUGLAS BOGD: BOGDAN	96 PAID WORK			Based on Contract		
1017 DOUGLAS BOGD: BOGDAN	4 VACATION	Daily Standard		Based on Contract		Valid

Report Selections:

APM - Planned Absences by Date

File Date Plant Site Department Employee Sort Code Profession Absence Code Coverage Group

Output Options Start Report

Date From 14/08/2005 To 14/08/2005

Plant 1 - 999999	Scheduled Absence Code All
Site 1 - 999999	Employees Sort By Number
Department 1 - 9999999999	Page Break on Date
Employee 1 - 999999999999	Send Report To Screen
Sort Code 1 - 999999	
Profession 1 - 9999	
Absence Code 0 - 999	
Coverage Group 0 - 9999	

Number Of Copies 1



7.3 Monthly Planned and actual Absences (Menu Entry: RAPMONTH)

Purpose: Displays Planned and Actual absences on a monthly view by Department

Report Layout:

DEMO SYSTEM																								
Monthly Scheduled & Actual Absences Report for March 2005																								
Plant: 1 TimeTECH		Site: 1 *		Department: 5 Painting																				
Employee	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
1016 MONROE JANICE JA			VAP																					
1036 SEINFELD TED TEI		JDP	VAP																					
Absence Codes:		4	VAP-VACATION PAID		18	JDP-JURY DUTY PAID		96	PWD-PAID WORKDAY															
<p>Legend: For Every Month: 1st Line - Scheduled; 2nd Line - Actual + More than one Scheduled/Used Absence Exists ! Authorized Scheduled Exceptions x Unauthorized Scheduled Exceptions</p>																								

Report selections:

Additional Information

- The report displays ONLY employees that have at least one planned absence in the selected calendar month
- The report displays the short description of the absence on a given day with a detailed legend at the bottom
- When there is more then one absence during a day, the day is flagged with the description of the first absence with "+"
- Unauthorized absences are flagged with "X"
- Authorized absences are flagged with "!"



7.4 Annual Planned and actual Absences (Menu Entry: RAPMYEAR)

Purpose: Displays Planned and Actual absences on an annual calendar by Department

Report Layout:

Annual Scheduled Absences Report for		2005		DEMO SYSTEM																							
Employee: 1119 SHEPPERD MATT MATT																											
Plant: 1 TimeTECH						Site: 1 *						Department: 1 Management															
	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	
January			SH									VAP	VAP	VAP			VAP	VAP	VAU								
February								JDP		VAP																	
March																											
April				VAP																							VA
May																								SH			
June																											
July	VAP																										
August																											
September					SH																						
October																											
November																		SH	SH								
December																											
Absence Codes:		1	UA-Unauthorized Absence				4	VAP-VACATION PAID				5	VAU-VACATION UNPAID				18	JDP-JURY DUTY PAID				28	SH-STAT HOLID.				
Legend:		+ More than one Scheduled/Used Absence Exists																									
		! Authorized Scheduled Exceptions												x Unauthorized Scheduled Exceptions													

Report Selections

APM - Annual Planned & Actual Absences

File Year Plant Site Department Employee Sort Code Profession Absence Code Coverage Group

Output Options Start Report

? [Icons]

Year <u>2005</u>	
Plant <u>1 - 999999</u>	Start Month- <u>1</u>
Site <u>1 - 999999</u>	Month Display Order <u>Fixed</u>
Department <u>1 - 9999999999</u>	Display Type <u>Scheduled</u>
Employee <u>1 - 999999999999</u>	Scheduled Absence Code <u>All</u>
Sort Code <u>1 - 999999</u>	Employees Sort <u>By Number</u>
Profession <u>1 - 9999</u>	Send Report To <u>Screen</u>
Absence Code <u>0 - 999</u>	
Coverge Group <u>0 - 9999</u>	
Number Of Copies <u>1</u>	



7.5 APM Coverage Report (Menu Entry: RAPMCOVE)

Purpose: Displays the coverage Status

Report Layout:

DEMO SYSTEM																										
Annual Coverage Exception Report for 2005																										
Coverage Group: 1 Management												Profession: 1 *														
	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
January			-1									-1	-1	-1				-1	-1	-1						
February								-1		-1																
March																										
April					-1																		-1			-1
May																									-1	
June																										
July	-1																									
August																										
September					-1																					
October																										
November																		-1	-1							
December																										

Report Selection:

APM - Coverage Report

File Year Coverage Group Profession Output Options Start Report

Year 2005

Coverage Group <u>0 - 9999</u>	Start Month- <u>1</u>
Profession <u>1 - 9999</u>	Month Display Order <u>Fixed</u>
	Summary Levels <u>Coverage Exceptions Only</u>
	Send Report To <u>Screen</u>
	Use Parameters File <u>RAPMCOVE Parameter file for RAPMCOVE</u>

Number Of Copies 1