

# ABSENCE SYSTEM MAINTENANCE AND USE

## VIEWING ABSENCE CODES

- 1.1 Select the *Absence System, Master Maintenance* menu option and from that, select the *Absence Code Maintenance*.

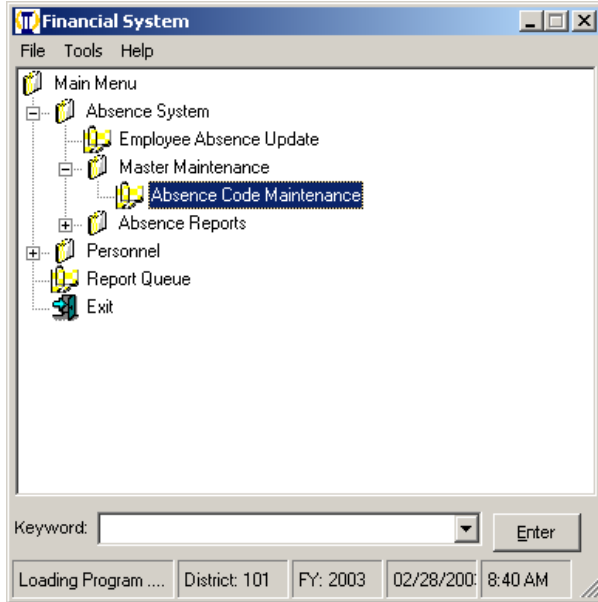


Illustration 1.1

- 1.2 Upon entering the program, the *Absence Code Master* Tab displays a listing of all Absence Codes in the tab's search grid, as shown in Illustration 1.2. You may use the scroll bar on the right to scroll through the grid in search of a particular Absence Code. Alternatively, to view a particular Absence Code you may type in the Number, Name or Partial Name of the code next to the field entitled *Enter Absence Code or name to search on*. To execute the search, hit the Enter key while the cursor is still inside the search field or click the **Search** button.

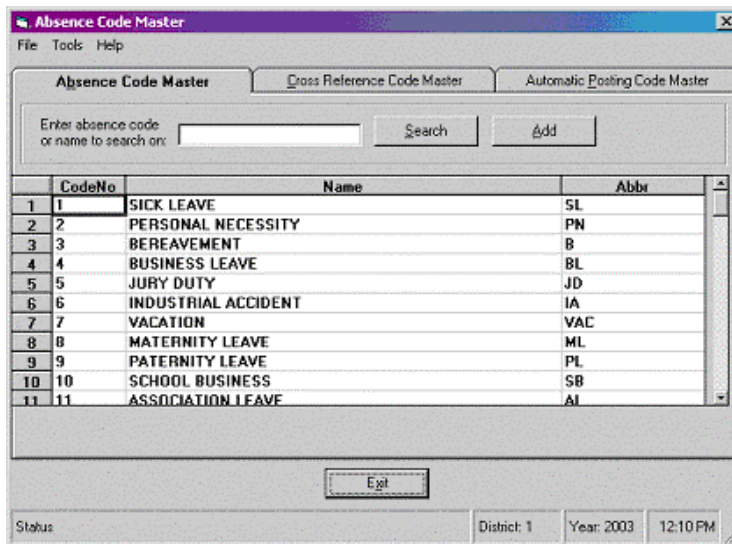


Illustration 1.2

## ABSENCE SYSTEM MAINTENANCE AND USE

- 1.3 The results of your search will display in the Search Grid, as shown in Illustration 1.3. If you are searching for a numeric code that does not exist, the program will ask if you want to add the code you are searching for. By default, the Absence Codes are ordered by Absence Code Number. To see the codes listed by Absence Code Name or Abbreviated Name, click the grid header entitled **Name** or **Abbr**, respectively. The items in the grid will resort by the selected header. To return to a numeric sort order, click the grid header entitled **CodeNo**.

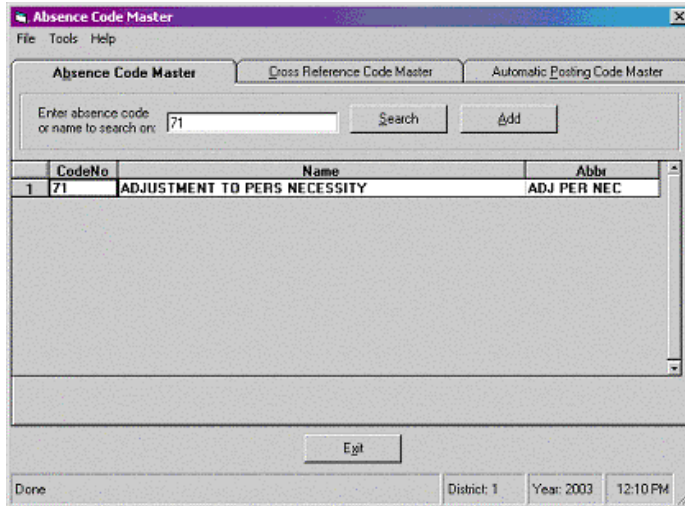


Illustration 1.3

- 1.4 You may print the contents of the search grid at any time by clicking on the **File** menu and selecting the **Print** option, or by using the hot keys, **Ctrl+P**.

### ADDING AND EDITING ABSENCE CODES

- 2.1 To add a new Absence Code, click the **Add** button (see Illustration 1.2); alternatively, if you try to search for an Absence Code that doesn't exist, a dialogue box will pop up informing you that the code you entered does not exist and asking you if you would like to add the code. If you click the **Yes** button in the dialogue box, it will have the same effect as selecting the **Add** button. In both cases a window will appear to accept information for the new Absence Code (see Illustration 2.2).

## ABSENCE SYSTEM MAINTENANCE AND USE

- 2.2 To add an Absence Code, enter a number for the code in the field entitled *Absence Code* (make sure the number you enter does not already exist). Type in a Name for the new code in the *Name* field and an abbreviated name in the field entitled *Abbr* - the abbreviated name must be 12 characters or less. To save the new Absence Code, click the **Add** button. To cancel the operation and return to the Absence Code Master Tab, click the **Cancel** button.

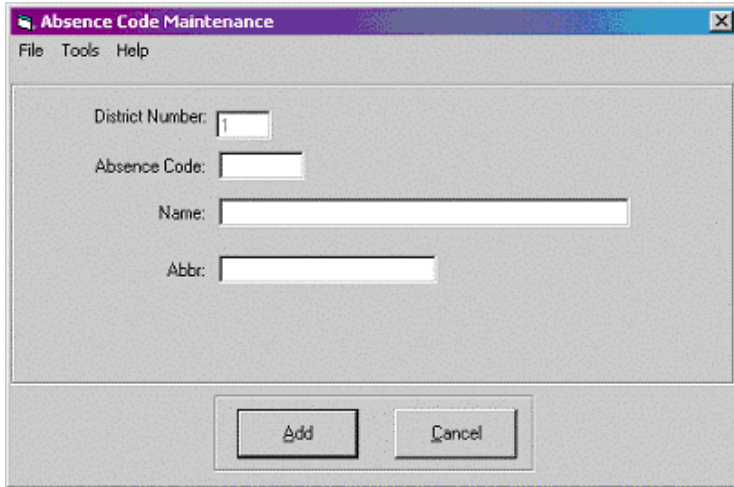
The image shows a software dialog box titled "Absence Code Maintenance". It features a standard menu bar with "File", "Tools", and "Help". The main area contains four text input fields: "District Number:", "Absence Code:", "Name:", and "Abbr:". At the bottom of the dialog, there are two buttons: "Add" and "Cancel".

Illustration 2.2

- 2.3 To edit an existing Absence Code, select one from the search grid and double-click the item. Once you have located the Absence Code and double-clicked it with your mouse, the screen shown in Illustration 2.2 will appear with each field already populated.
- 2.4 Change the Absence Code Number, Name or Abbreviated Name by navigating to the appropriate field and changing the information displayed.

*Note: If you are changing the Absence Code Number, be sure to change it to a number that does not already exist.*

- 2.5 To save the updated Absence Code, click the **Update** button; to cancel the operation and return to the Absence Code Master Tab, click the **Cancel** button.

### CROSS REFERENCE RELATIONSHIPS

- 3.1 Upon entering the program, the **Cross Reference Code Master** Tab displays a listing of all Cross Reference Relationships in the tab's grid, as shown in Illustration 3.1. You may use the scroll bar on the right to scroll through the grid in search of a particular Cross Reference Relationship.

# ABSENCE SYSTEM MAINTENANCE AND USE

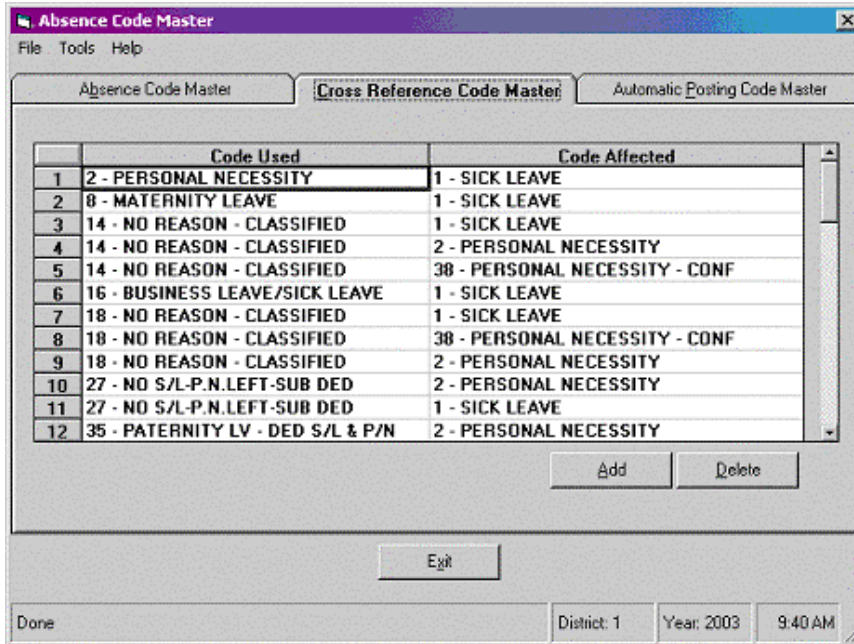


Illustration 3.1

One side of the grid displays the **Code Used** and the other side displays the **Code Affected**. What this means is that when leave hours are assigned to or deducted from the **Code Used**, the same number of hours is automatically applied to the **Code Affected**.

By default, the Cross Reference Relationships are ordered by the **Code Used**. If you would like to see the codes listed by the **Code Affected**, click the grid header entitled “Code Affected”. The items in the grid will resort; to return to the original sort order, click the grid header entitled **Code Used**.

- 3.2 To add a Cross Reference Relationship, click the **Add** button near the bottom of the tab. This will open a new frame and allow you to select items to link from drop down menus.
- 3.3 To save the updated Cross Reference Relationship, click the **Add** button. To cancel the operation and return to the Cross Reference Code Master Tab, click the **Cancel** button.
- 3.4 To delete a Cross Reference Relationship, find the relationship you want to delete on the grid in the Cross Reference Code Master Tab. Select the row and hit the delete button. This will cause a dialogue box to appear that will verify that you meant to delete the row.

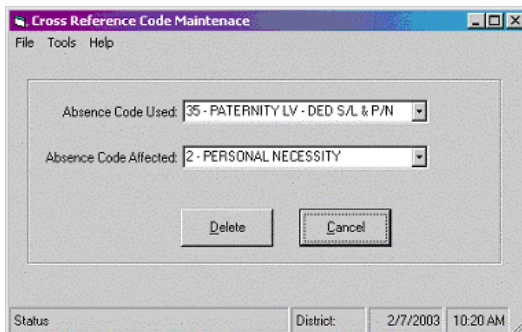


Illustration 3.6

You may select the **Delete** button from this screen and remove the relationship.

# ABSENCE SYSTEM MAINTENANCE AND USE

## AUTOMATIC POSTING CODES

4.1 Upon entering the **Automatic Posting Code Master** Tab, the program displays a listing of all Automatic Posting Relationships in the tab's grid, as shown in the following illustration.

|    | Type | Type Description                 | Code | Code Description          |
|----|------|----------------------------------|------|---------------------------|
| 1  | APN  | Adjustment to Personal Necessity | 97   | AUTOMATIC PN ADJUSTMENT   |
| 2  | AVC  | Adjustment to Vacation           | 93   | VACATION ADDED            |
| 3  | BH   | Birthday Holiday                 | 95   | BIRTHDAY HOLIDAY ADDED    |
| 4  | MSL  | Monthly Sick Leave               | 90   | SICK LEAVE ADDED          |
| 5  | MVC  | Monthly Vacation                 | 93   | VACATION ADDED            |
| 6  | PN   | Personal Necessity               | 2    | PERSONAL NECESSITY        |
| 7  | PNH  | Per. Nec. Holding Code           | 100  | YEARLY PN ABOVE ACCRUED S |
| 8  | SL   | Sick Leave                       | 1    | SICK LEAVE                |
| 9  | Vac  | Vacation                         | 7    | VACATION                  |
| 10 | YPN  | Yearly Personal Necessity        | 91   | PERSONAL NECESSITY ADDED  |
| 11 | YSL  | Yearly Sick Leave                | 90   | SICK LEAVE ADDED          |
| 12 | YVC  | Yearly Vacation                  | 93   | VACATION ADDED            |

Illustration 4.1

4.2 You may add or delete Automatic Posting Codes in much the same way as Cross Reference codes. These codes are triggered by Payroll events or in the case of annual codes, are caused to post by an annual rollover. The employee must also be set up to accrue automatically as well. Sick leave (SL), Vacation (Vac) and Personal Necessity (PN) codes must be present if you wish to print these on the payroll checks.

# ABSENCE SYSTEM MAINTENANCE AND USE

## ENTERING AND MODIFYING EMPLOYEE TOTALS

5.1 Select the **Employee Absence Update** menu option from the main screen. (See Illustration 5.1)

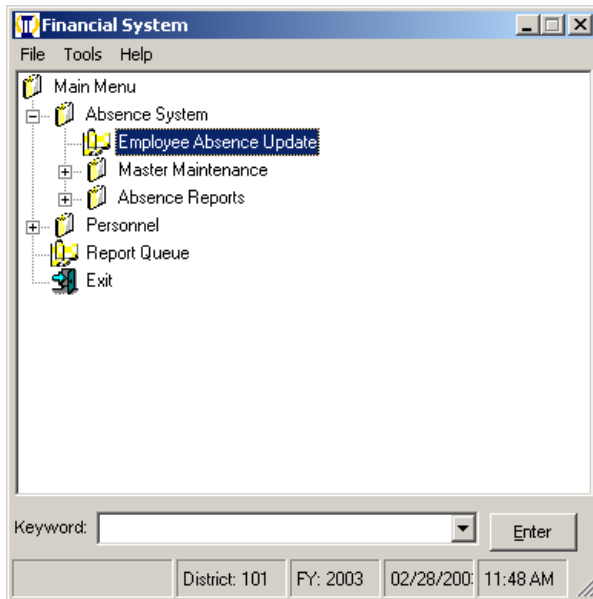


Illustration 5.1

5.2 Upon entering the Employee Absence Update, a selection screen will appear.

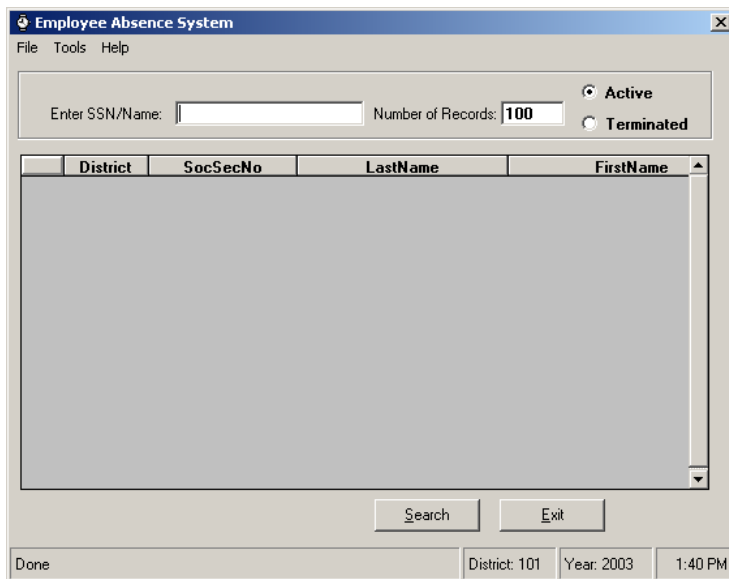


Illustration 6.2

5.3 If you wish to search the database you may leave the *SSN/Name* field blank and click the **Search** button. This will fill the grid with records up to the number requested in the *Number of Records* field. Alternately, if you have a specific individual in mind you may enter their SSN or last name in the *SSN/Name* field and search for them. Where only one individual exists the screen will automatically change to the **Log** screen. Double click a name in the grid when there are multiple entries in order to move to the **Log** screen.

## ABSENCE SYSTEM MAINTENANCE AND USE

5.4 If the employee does not yet exist in the Absence system, the user will be prompted to add them. At this point, the screen will change to the initial entry screen and will display the **Employee Absence Information** tab.

The screenshot shows a software window titled "Employee Absence Information" with a menu bar containing "File" and "Help". The form contains the following fields and sections:

- Employee Information:** SocSecNo: 123-45-6789, Name: JANE DOE
- Sick Leave Rates:** Radio buttons for "Annual" (selected) and "Monthly". SL Per Yr/Mo: 0
- Personal Necessity / Employee Information:** PN Per Yr: 0, Hrs Per Day: 8, Hire Date: 01/01/2002, Seniority Date: / /, Report Code: 2-Classified Employees
- Beginning Balances:** Sick Leave Balance Fwd: [ ], Vacation Balance Fwd: [ ]
- Vacation Rates:** Radio buttons for "Annual" (selected) and "Monthly".
  - Vacation Max: 0
  - Rate 1: 0, Date: / /
  - Rate 2: 0, Date: / /
  - Rate 3: 0, Date: / /
  - Rate 4: 0, Date: / /
  - Rate 5: 0, Date: / /
  - Rate 6: 0, Date: / /
  - Rate 7: 0, Date: / /
  - Rate 8: 0, Date: / /

At the bottom, there are "Add" and "Cancel" buttons. The status bar at the bottom right shows "District: 101", "Year: 2003", and "3:04 PM".

Illustration 5.4

5.5 Complete the required information: Sick Leave Rates, PN Per year, and Vacation Rates. If this employee will be carrying some Sick Leave or Vacation balances forward from the HP system these balances must be input before saving the employee. Click the **Add** button to save this information.

*Note: If the District will be using annual or monthly automatic accruals for Vacation and Sick Leave, these must be set up in **Absence Code Maintenance** on the **Automatic Posting Code Master** tab.*

## ABSENCE SYSTEM MAINTENANCE AND USE

5.6 Once the information has been saved, the application will forward the user to the **Add Log Record** tab. This is where the day-to-day entries are made that record Sick Leave, Vacation and Personal Necessity days/hours taken.

**Requested Date(s):**

From: // To: // Hours Used: 60.00 Absence Code: Reason:

|    | Abs Codes       | Hours  | Abs Codes        | Hours | Abs Codes       | Hours |
|----|-----------------|--------|------------------|-------|-----------------|-------|
| 1  | 1 SL            | 60.00  | 2 PN             | 0     | 3 B             | 0     |
| 2  | 4 BL            | 0      | 5 JD             | 0     | 6 IA            | 0     |
| 3  | 7 VAC           | 184.00 | 8 ML             | 0     | 9 PL            | 0     |
| 4  | 10 SB           | 0      | 11 AL            | 0     | 12 MIL          | 0     |
| 5  | 13 OL           | 0      | 14 NO REAS-CLSS  | 0     | 15 SAL DED PN/B | 0     |
| 6  | 16 BUS LV/SICK  | 0      | 17 FLOAT HOLIDAY | 0     | 18 NO REAS-CLSS | 0     |
| 7  | 19 NO REAS-CERT | 0      | 20 NON-DUTY-DAY  | 0     | 21 SUB/HRS.     | 0     |
| 8  | 22 GL           | 0      | 23 NO S.L. SUB   | 0     | 24 NO SL NO SUB | 0     |
| 9  | 25 NO S.L. S.D. | 0      | 26 J.A.          | 0     | 27 NO S.L.W/P.N | 0     |
| 10 | 28 COMP TIME    | 0      | 29 OUT SL DED    | 0     | 30 NO VAC SD    | 0     |

Buttons: Add, Cancel

Status: District: 101 Year: 2003 1:58 PM

Illustration 5.6

5.7 Several fields must be completed in order to record a new entry. In order to add annual hours to an employee, the *From* and *To* date fields would be filled out with dates that encompass the entire fiscal year (7/1/xx to 6/30/xy); where hours accrue monthly the dates would be solely for the month to be added. When adding hours, the amount put in the *Hours Used* field should be negative. (ex. -96) The *Absence Code* that will be used should be input along with any comments in the *Reason* field. After the entry has been completed, the Enter key may be used or the **Add** button should be clicked.

5.8 To deduct hours (as they are used) the *From* and *To* dates should be the date range that the employee took the time off. *Hours Used* would be input as positive numbers, and comments would be input in the *Reason* field. The totals will show in the grid below.

*Note: Information may also be viewed through the use of the Absence Information Report. (See section 6 of this document.)*

# ABSENCE SYSTEM MAINTENANCE AND USE

## ABSENCE INFORMATION REPORT

6.1 One of the primary analytical tools available for Personnel is the *Absence Information Report*. This report can provide detail on an individual or a group of individuals depending on the criteria used to select it. From the main menu select the report. (See Illustration 6.1)

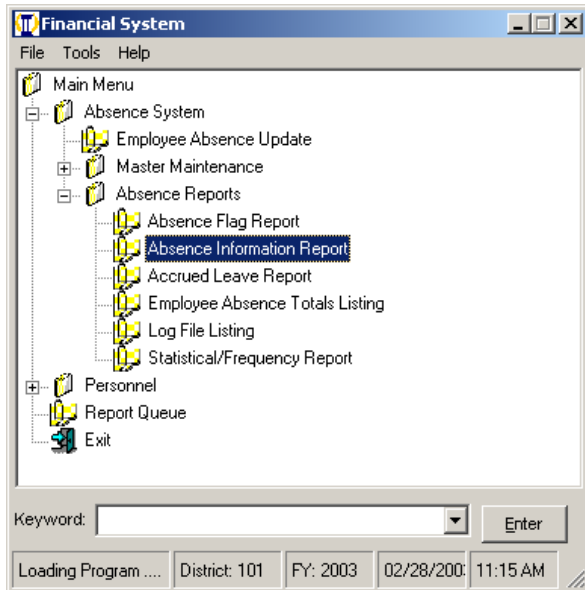


Illustration 6.1

6.2 Choose from either the **One Employee** or the **Multiple Employees** options to select your sample. *Note: If you choose the **One Employee** option you will be required to input a Social Security Number for the employee.*

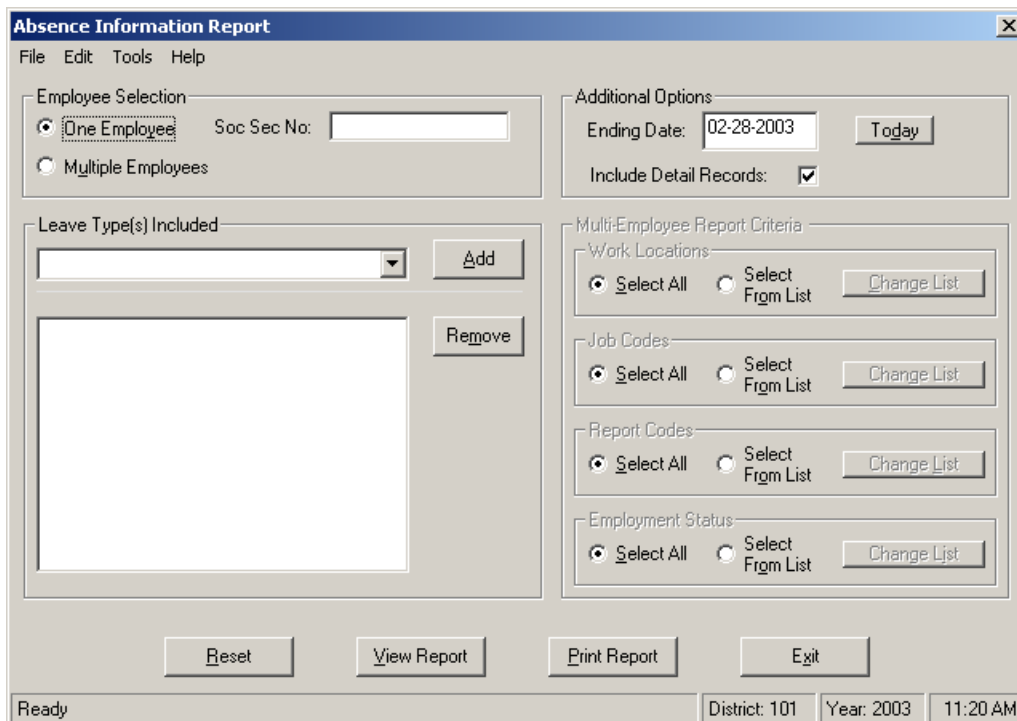


Illustration 6.2

## ABSENCE SYSTEM MAINTENANCE AND USE

- 6.3 Select a Leave type from the drop down menu under the *Leave Types(s) Included* frame. Once you have selected the appropriate type, click the **Add** button. This places the type into the larger box below it. Continue selecting Leave types until you have the combinations that you desire for the report.
- 6.4 Complete the *Additional Options* frame if you wish to apply the listed options of *Ending Date* and *Detail*.
- 6.5 If you chose the **Multiple Employees** selection, you will now have some additional criteria to apply in the *Multiple Employee Report Criteria* frame. For each section you may choose either all or a specific item or items from the list that appears by clicking the *Select From List* radio button. This list may be modified once created through the use of the **Change List** button.
- 6.6 Click the **View Report** button to preview it or the **Print Report** button to send it to a printer. If you wish to create a new report, you may click the **Reset** button. *Note: Using the **Reset** button will return all of the settings to their default and all information previously entered will be lost.*