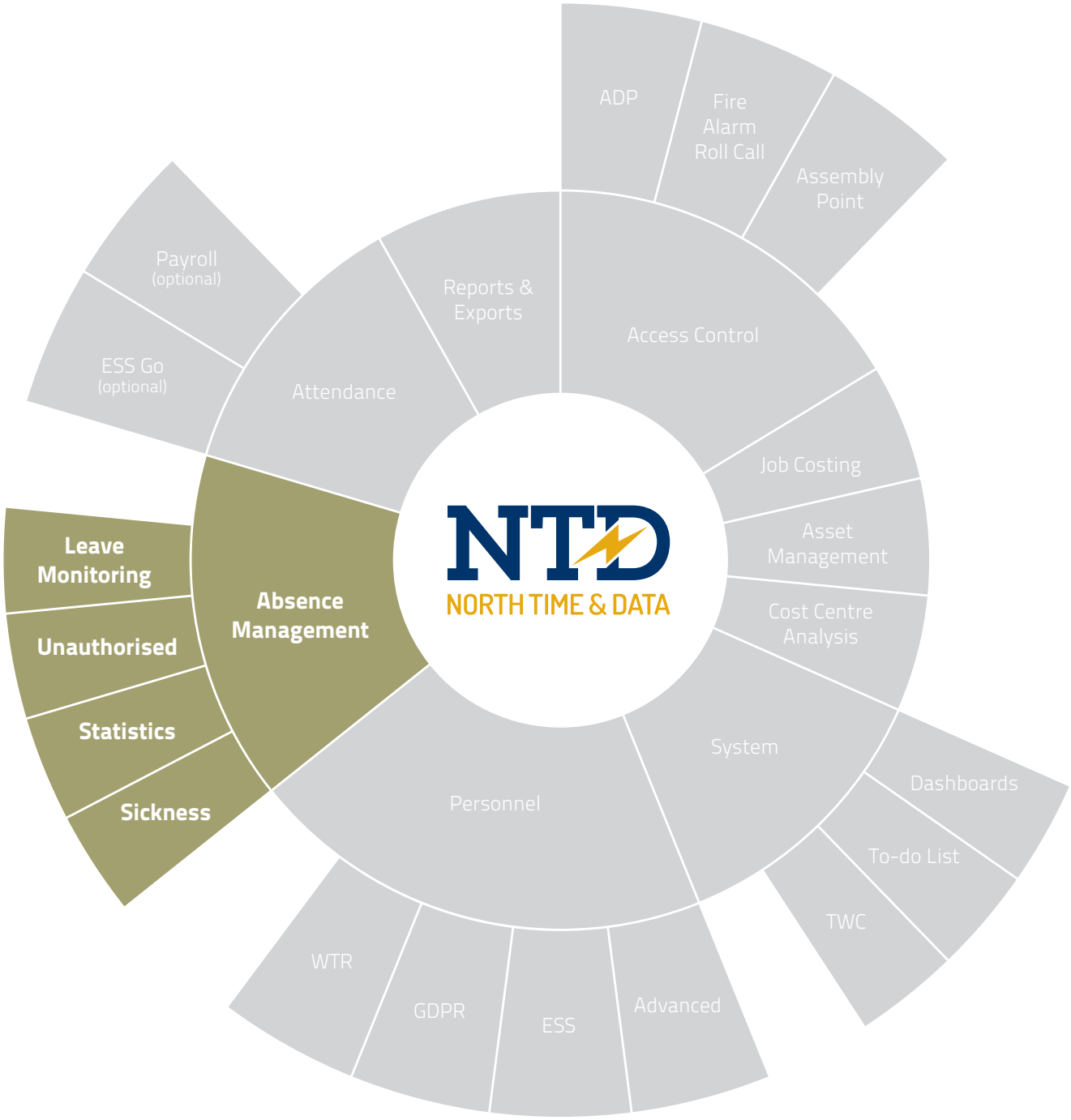
NORTH TIME & DATA

# Training guide:

# Absence Management





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# Contents

| Course | Duration |
|---|---|
| **tw21/op/abs001**<br>**An introduction to North Time Pro absence management** | Approximately 30 minutes |

Processing absence requests and monitoring absence statistics...


| Module | Description |
|---|---|
| m/03/101 | understanding absence management |
| m/03/110 | absence statistics |
| m/03/115 | adding an absence or holiday request |
| m/03/120 | amending an absence or holiday record |
| m/03/125 | Marking the absence as declined for tactical absence reasons |
| m/03/130 | absence and holidays on the 'To-Do' list |
| m/03/150 | viewing a person's absence and holiday entitlement |
| m/03/160 | awarding an absence entitlement credit in days and hours |


All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.

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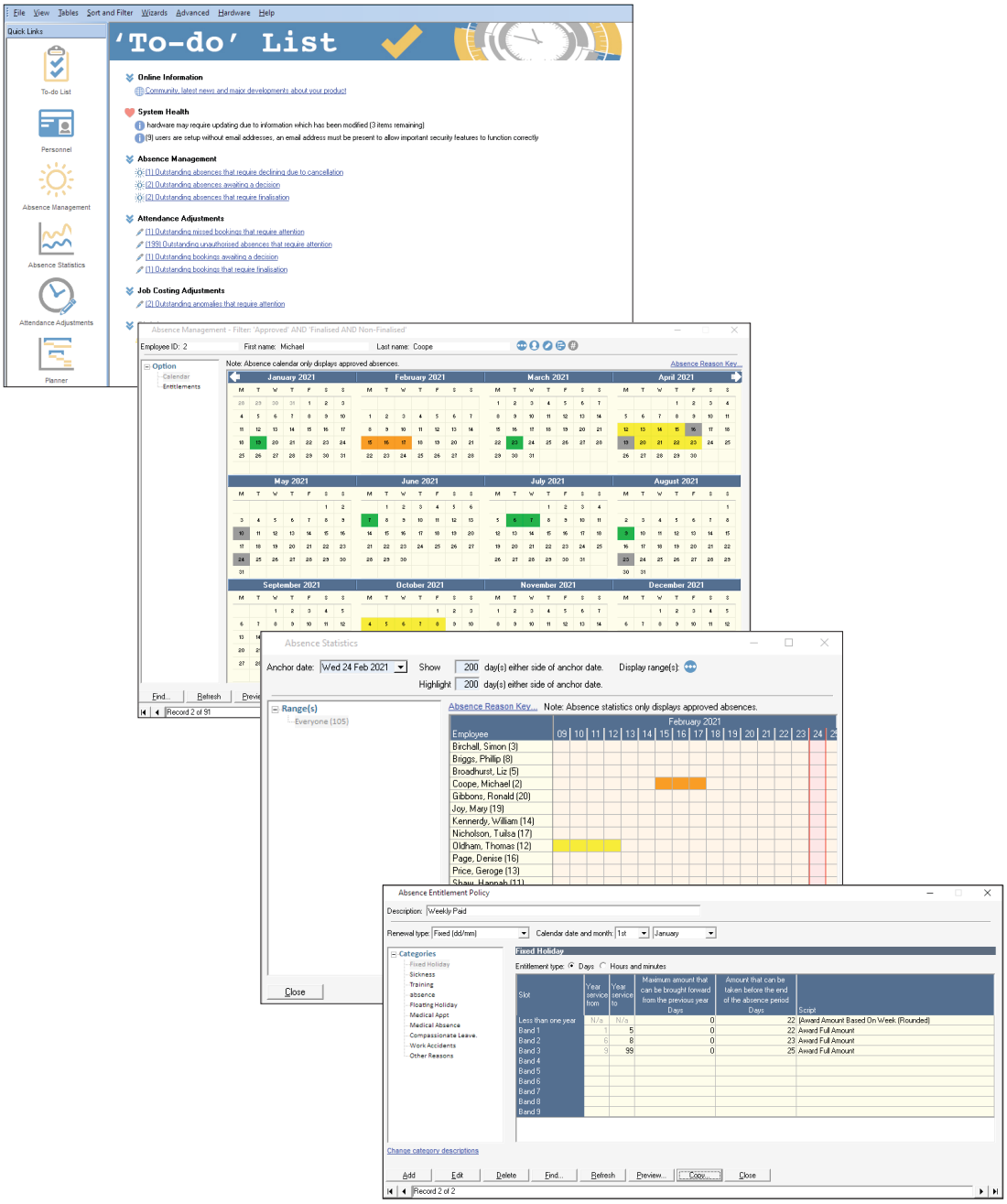
## Module:

# m/03/101
# Understanding absence management

North Time Pro absence management covers entitlements, company and individual statistics, absence tracking and trend reporting. Absence management may be used for all people in the company, not just those who clock-in at a terminal or the ESS.



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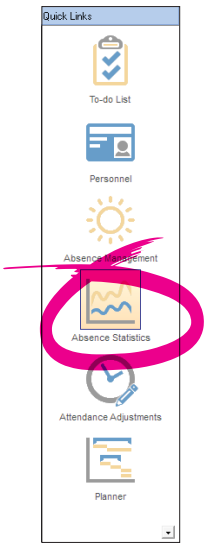
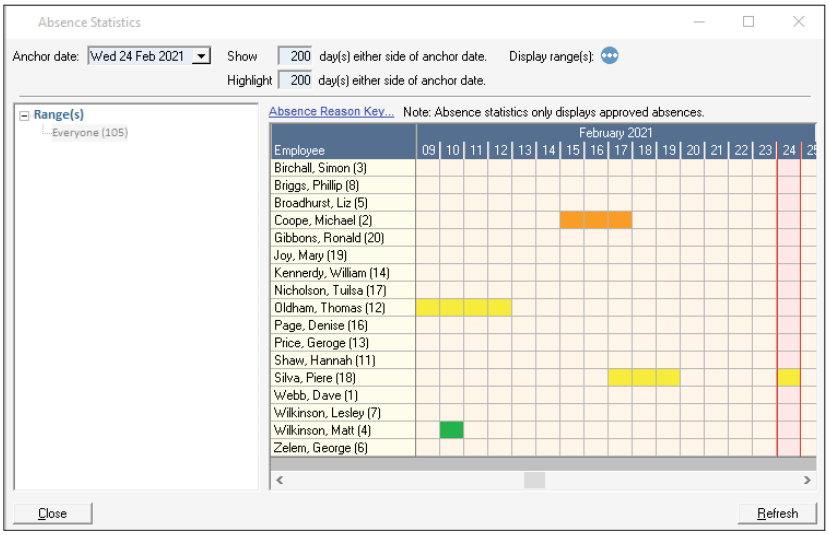
## Module:

# m/03/110
# Absence statistics

**1.** Click on the Absence Statistics Quick Link.




**2.** The statistics screen will then appear, utilising the parameters defined on your last session. Select 'Absence Reason Key' to display the descriptions of each absence colour.



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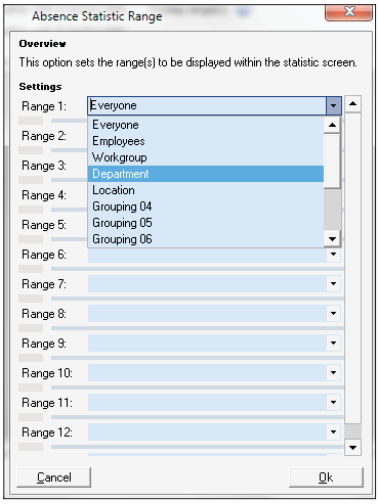
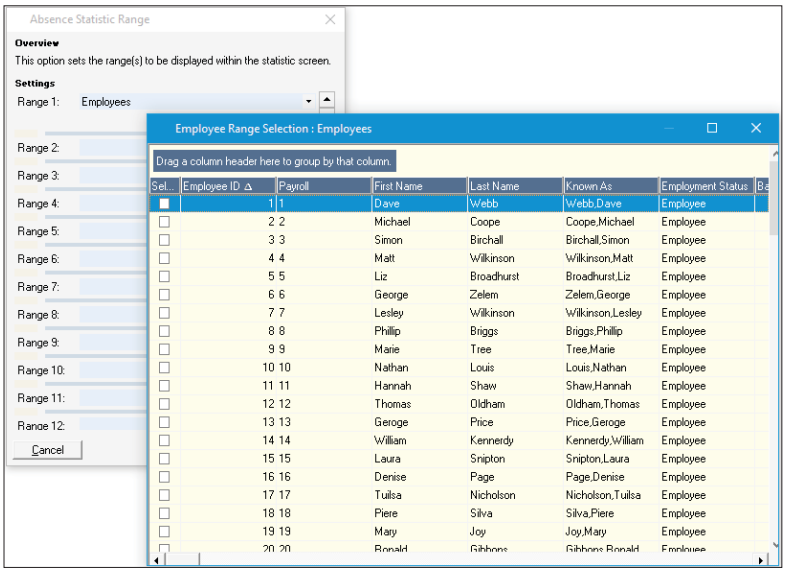
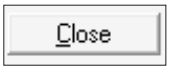
**3.** Select 'Display Range(s)' to modify the range of people displayed.



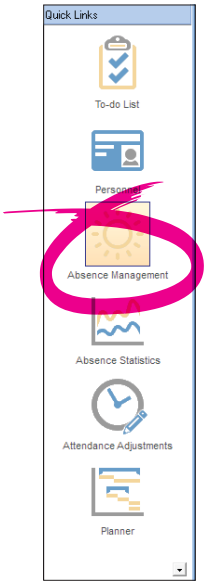

**4.** <Close> to leave the Absence and Holiday statistics screen.



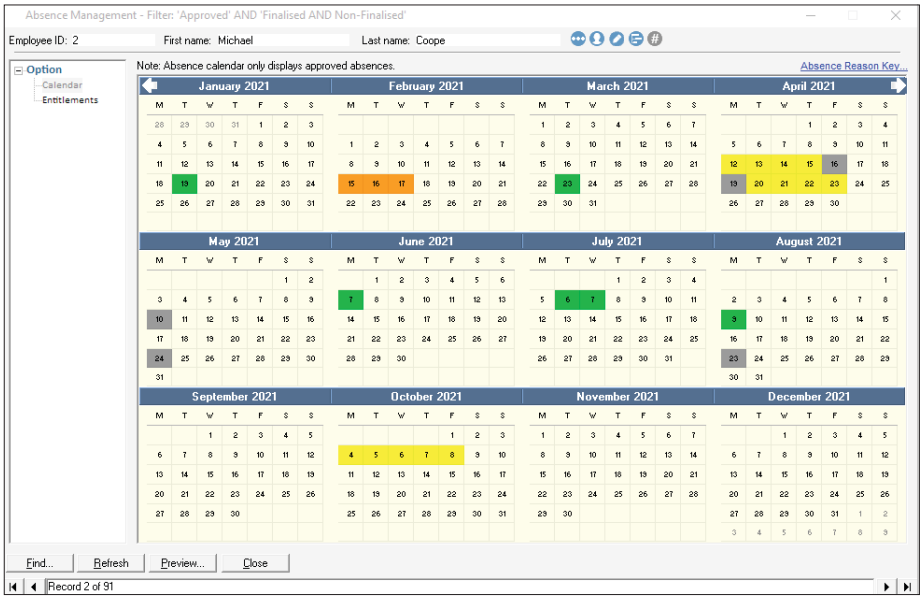
## Module:

# m/03/115
# Adding an absence or holiday request

**1.** Click on the Absence Management Quick Link.




**2.** The Absence Management screen appears at the person last viewed by the user



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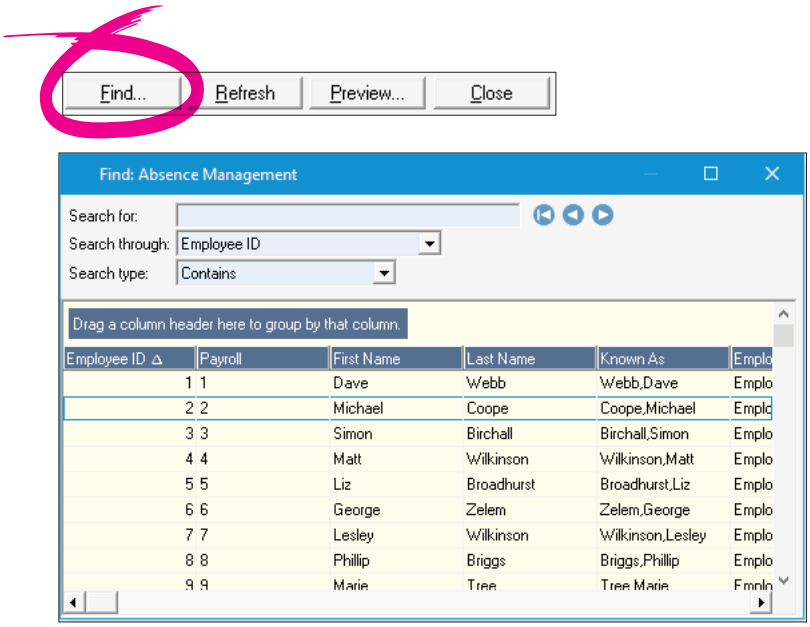
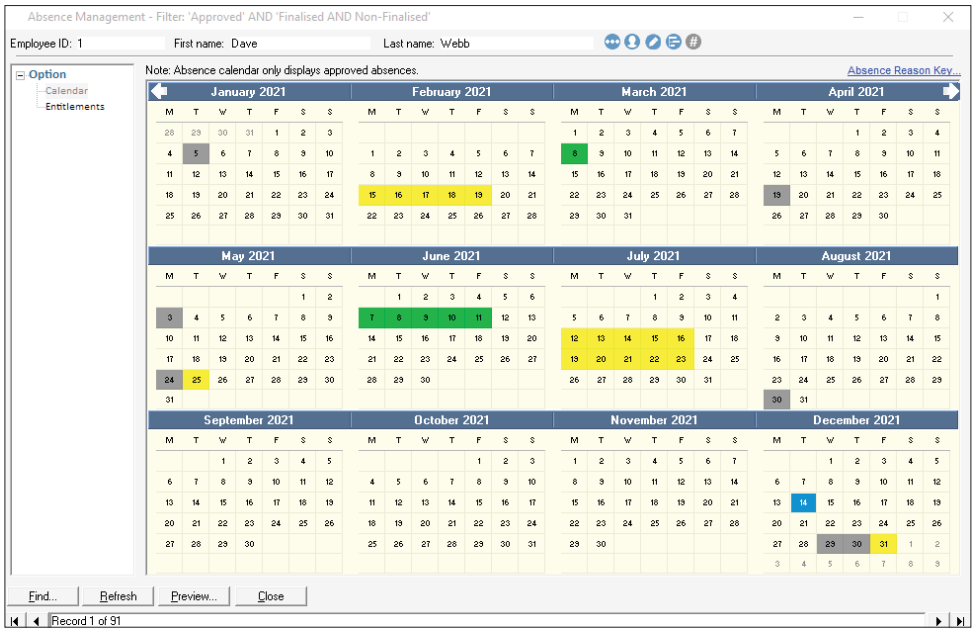
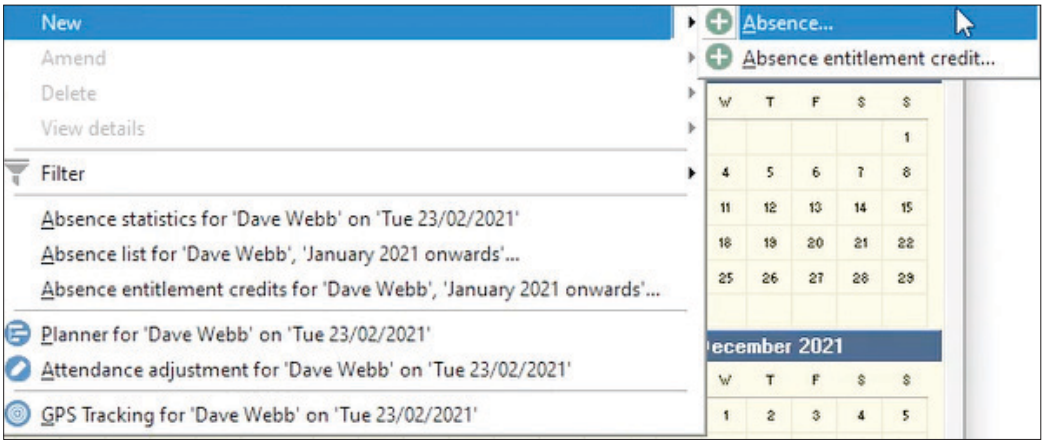
**3.** Click <Find> and search for the person whose absence you wish to book.

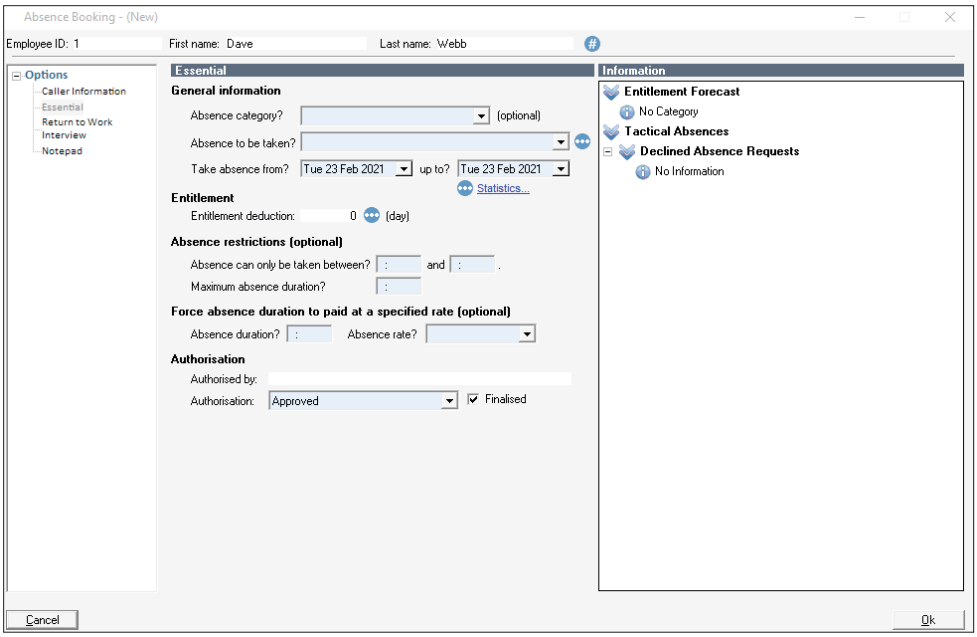


**4.** To request the absence or holiday, <Right-click> on the required date and select New...




**5.** Next, the Absence Booking form will appear.



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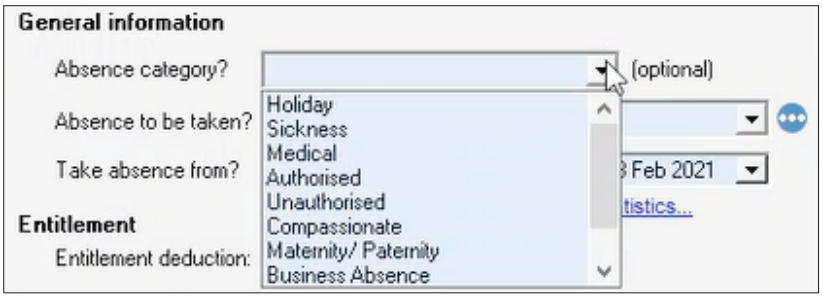
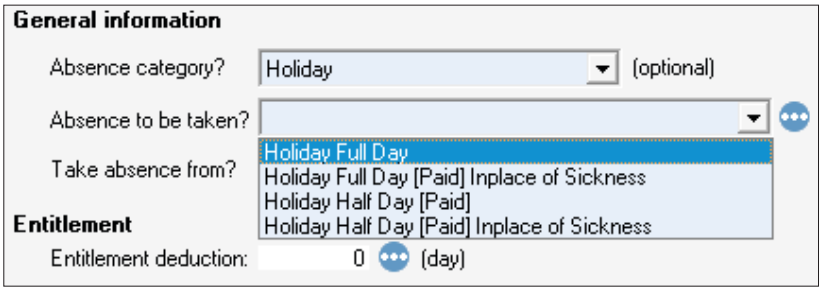
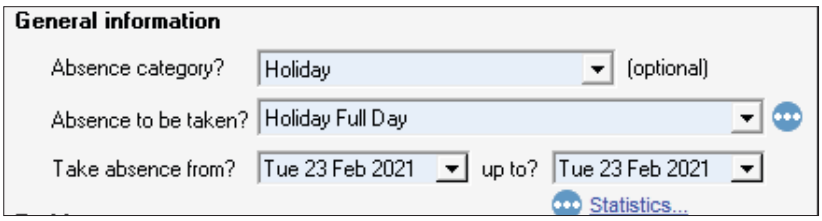
**6.** Select one of the Absence categories. This entry is optional.




**7.** Next, select the Absence to be taken.

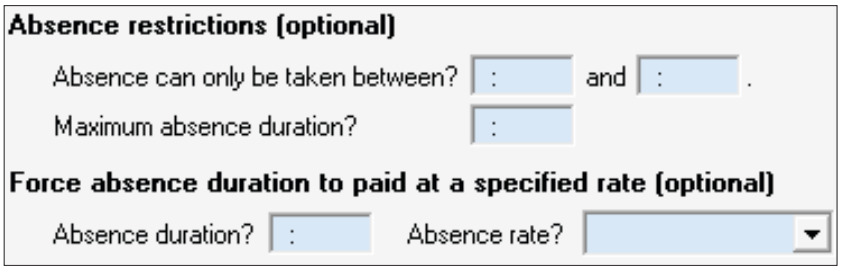



**8.** Now confirm the date range of the absence.

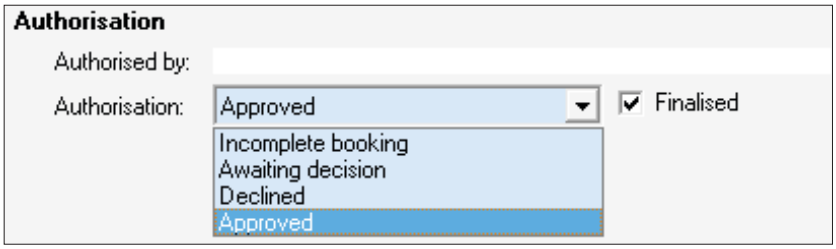


**9.** The Absence restrictions enable the user to specify what part of the day (and for how long), the absence can be taken. This entry is optional.

**Explanation: The doctor's appointment is sometime before lunch and cannot exceed 3 hours.**




**10.** Finally, select the Authorisation type. You may find that you cannot change this entry if your permissions do not allow. Only when an absence is finalised will an email be sent to the person confirming the status of the absence or holiday request.




**11.** Click <Ok> to save the absence request and return to the Absence Management screen.

**12.** Finally, click <Close> to leave the Absence Management screen.

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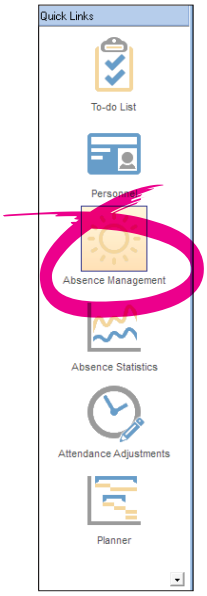
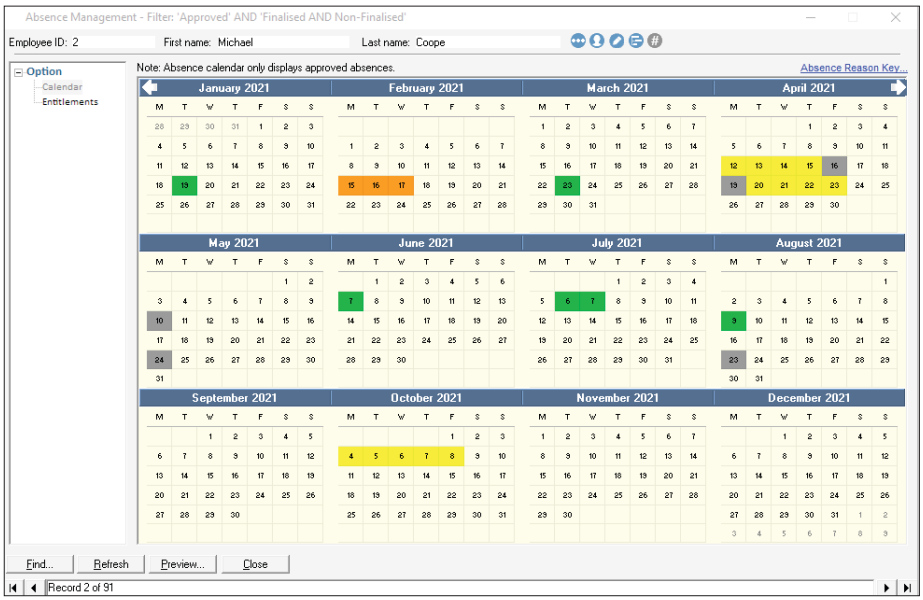
## Module:

# m/03/120
# Amending an absence or holiday record

**1.** Click on the Absence Management Quick Link.




**2.** The Absence Management screen appears at the record last viewed by the user



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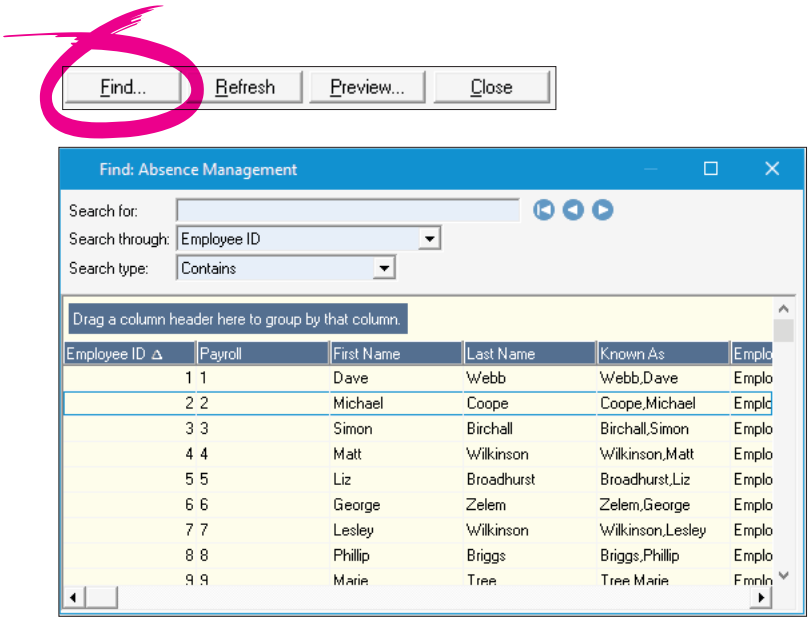
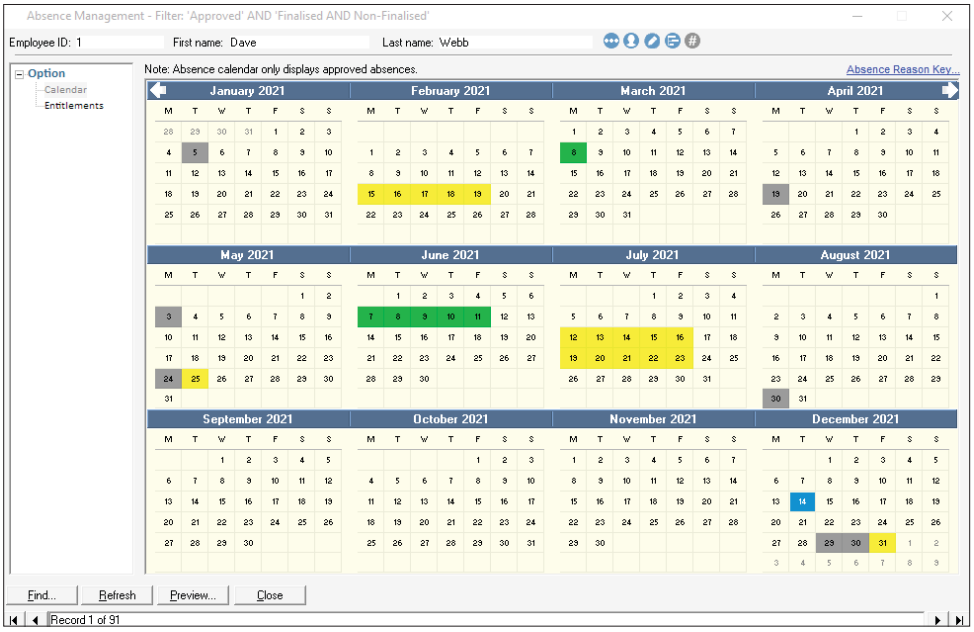
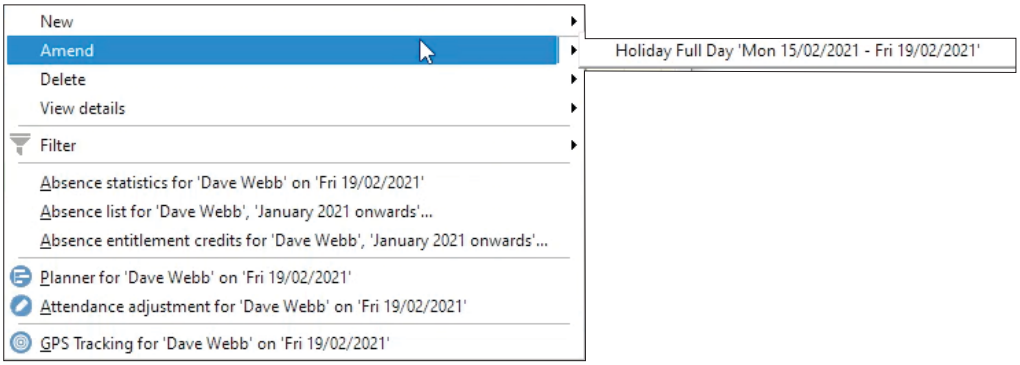
**3.** Click <Find> and search for the person whose entitlements you wish to view.



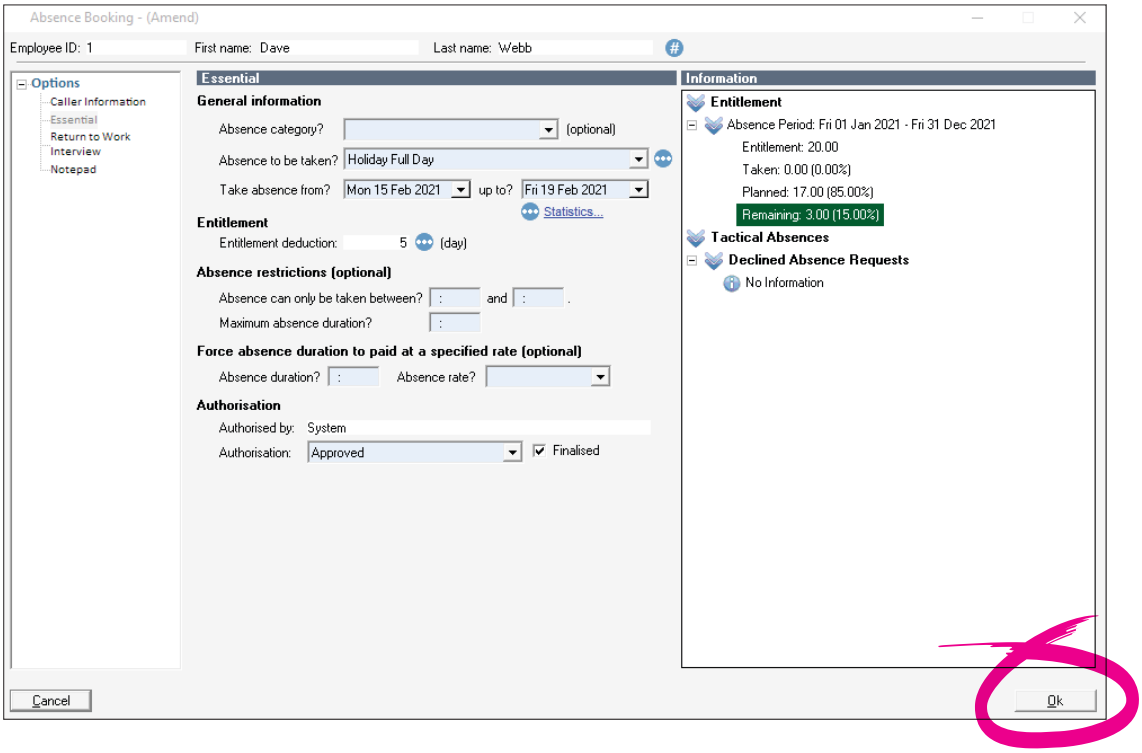

**4.** The person's absence calendar will appear.



**5.** <Right-click> on the required absence/holiday date, select Amend and then click on the absence description.




**6.** Next, make the necessary amendments in the Absence Booking form.




**7.** Finally, press <Ok> to save the modification and return to the Absence Management screen.

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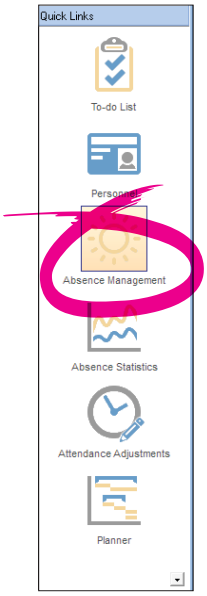
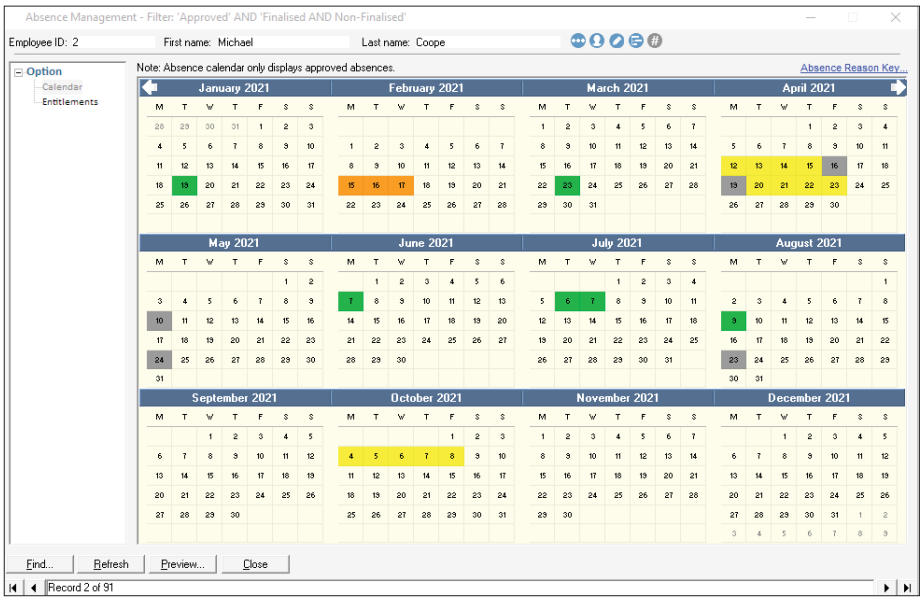
## Module:

# m/03/125
# Marking the absence as declined for tactical absence reasons

**1.** Click on the Absence Management Quick Link.




**2.** The Absence screen appears at the record last viewed by the user



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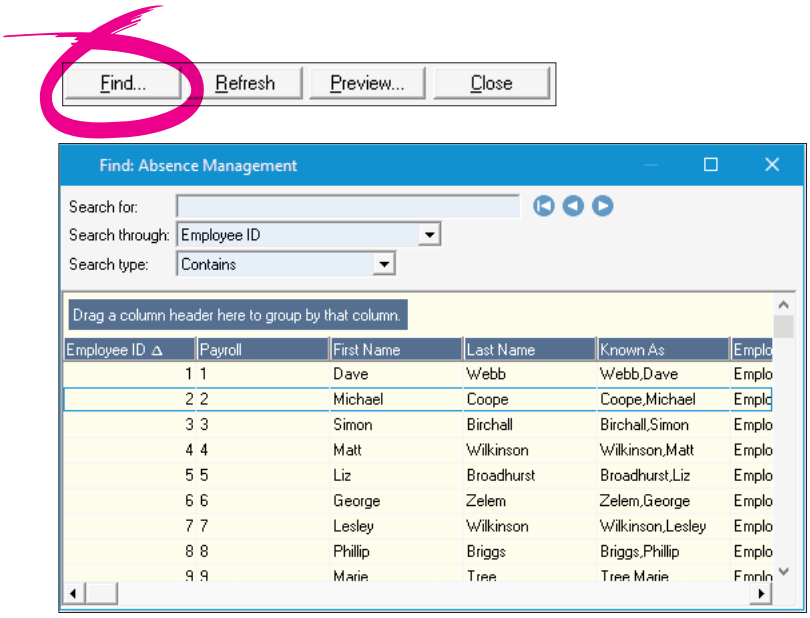
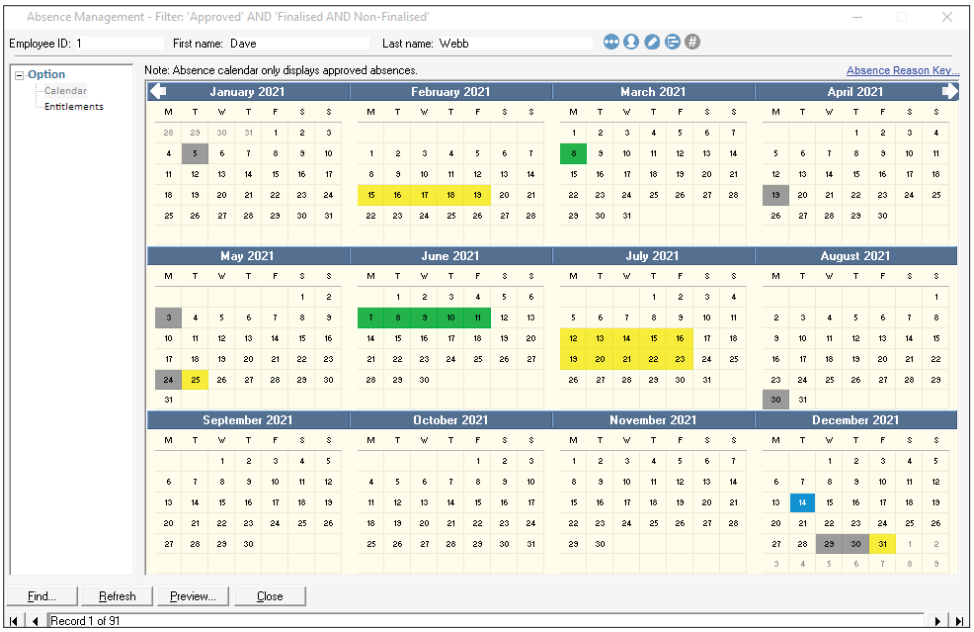
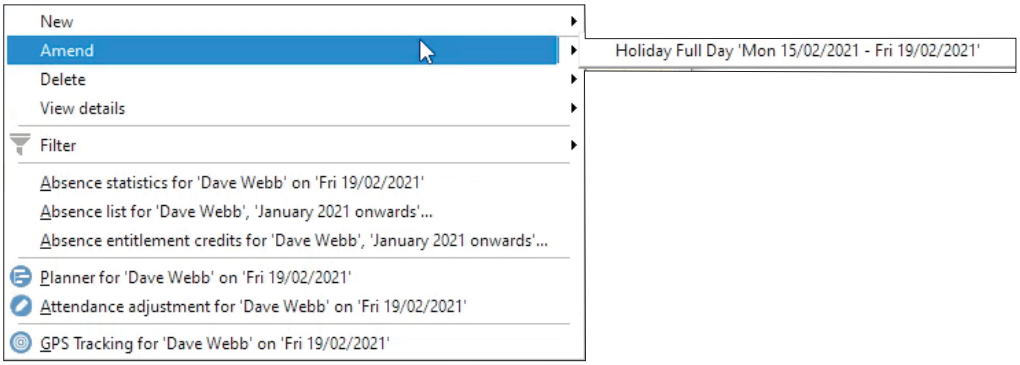
**3.** Click <Find> and search for the person whose entitlements you wish to view.



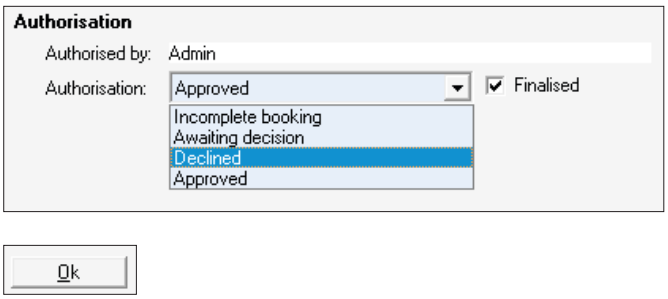

**4.** The person's absence calendar will appear.



**5.** <Right-click> on the required absence/holiday date, select amend and then click on the absence.




**6.** Change the authorisation to declined, then click ok.



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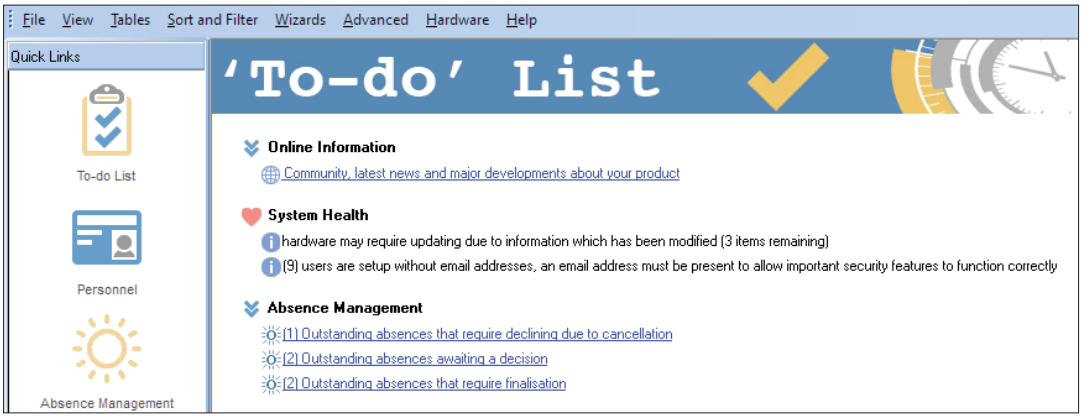
## Module:

# m/03/130
# Absence and holidays on the 'To-Do' list

1. A number of Absence Management 'To-Do' list items may appear on your 'To-Do' list dependant on how the North Time Pro system has been configured.




2. The three absence and holiday agenda items covered in this module are;
   - **a.** Awaiting decision
   - **b.** Require finalisation
   - **c.** Return to work interview

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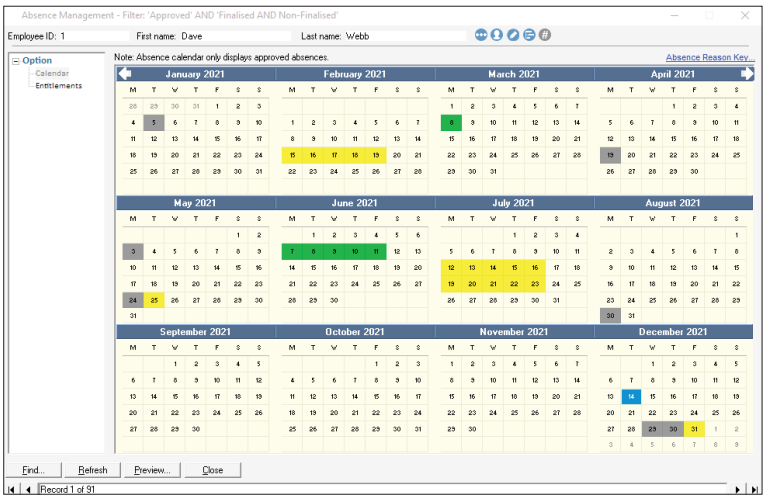
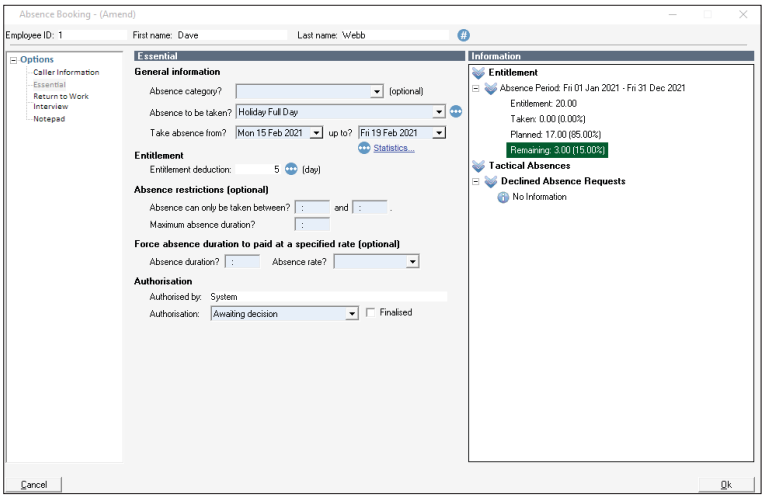
**3.** Awaiting a decision. This 'To-Do' List item highlights complete absence/holiday requests that have not yet been approved or finalised by a manager.

Clicking on the agenda link takes the user to the personnel absence/holiday selection screen.

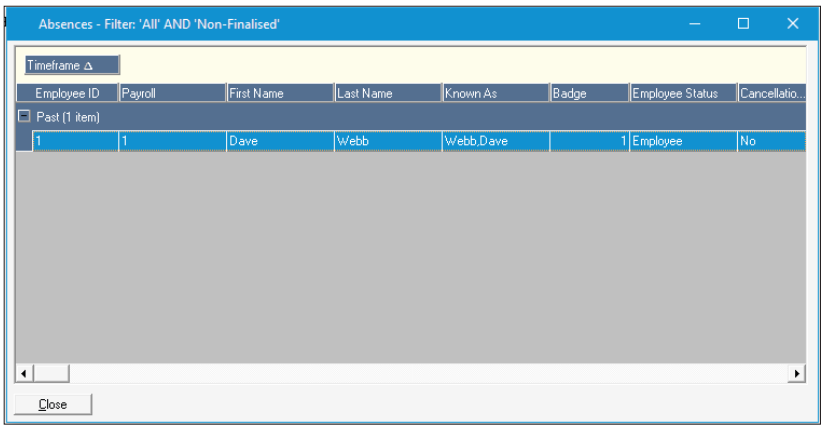



Selecting an person's absence/holiday, enables the user to modify the authorisation details to either Approved or Declined. Click <Ok> to return to the personnel absence/holiday selection screen.

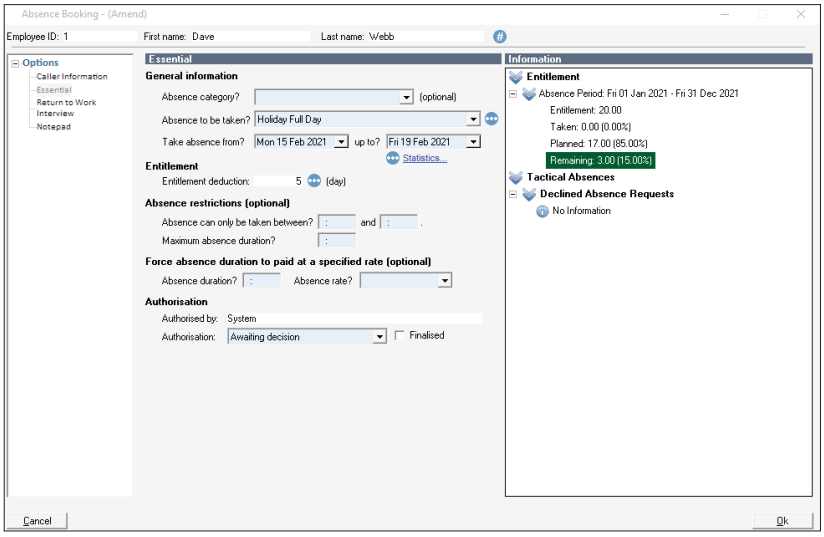


**4.** Require finalisation. Note that this option is mostly used where two step authorisation is required i.e. a line manager says it is fine to take but HR get the final say.

Clicking on the 'To-Do' List link takes the user to the personnel absence/holiday selection screen.




Selecting a personnel absence/holiday enables the user to modify the authorisation details to Finalised. Click <Ok> to return to the employee absence/holiday selection screen.



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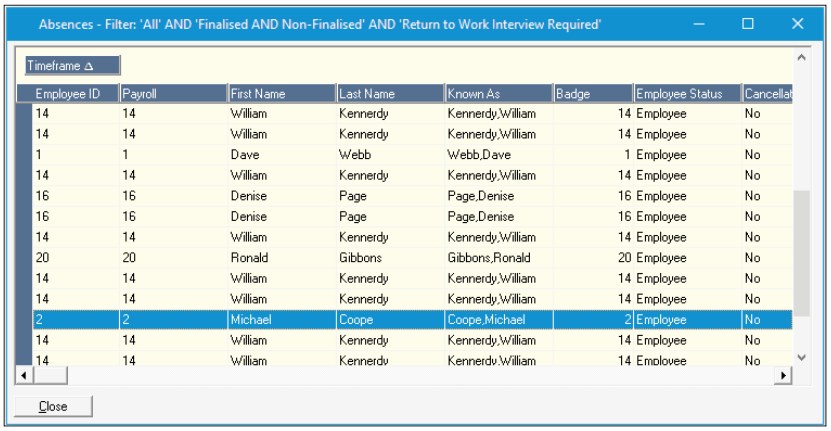
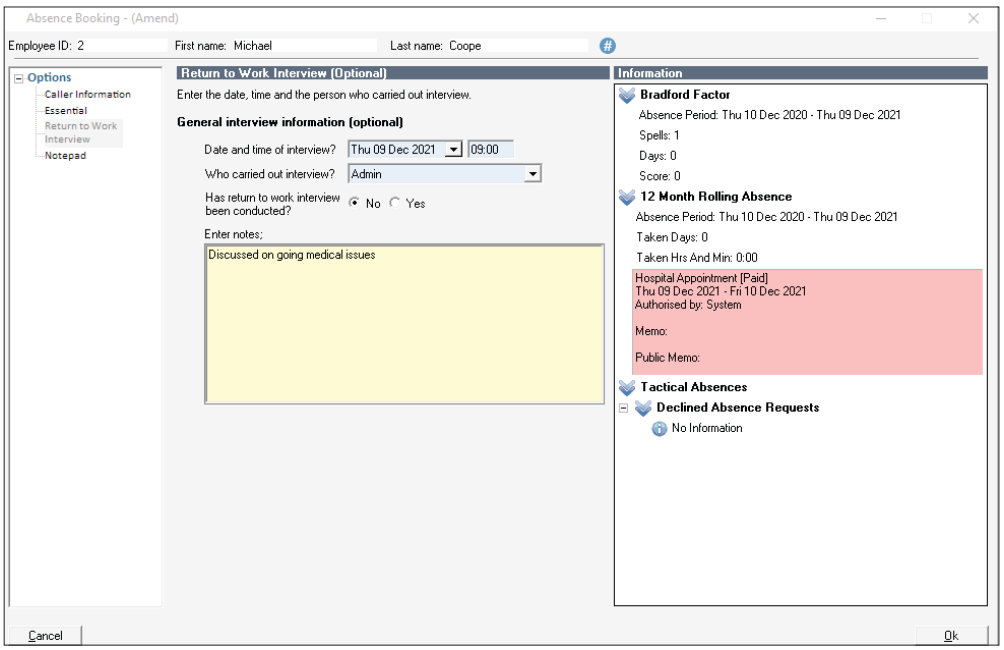
**5.** Require return to work interview. This agenda item highlights any absence spells that have exceeded the return to work interview limit specified in the appropriate absence reason.

Clicking on the 'To-Do' List link takes the user to the personnel return to work interview selection screen.




| Employee ID | Payroll | First Name | Last Name | Known As | Badge | Employee Status | Cancellat |
|---|---|---|---|---|---|---|---|
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 1 | 1 | Dave | Webb | Webb,Dave | 1 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 16 | 16 | Denise | Page | Page,Denise | 16 | Employee | No |
| 16 | 16 | Denise | Page | Page,Denise | 16 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 20 | 20 | Ronald | Gibbons | Gibbons,Ronald | 20 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 2 | 2 | Michael | Coope | Coope,Michael | 2 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |
| 14 | 14 | William | Kennerdy | Kennerdy,William | 14 | Employee | No |

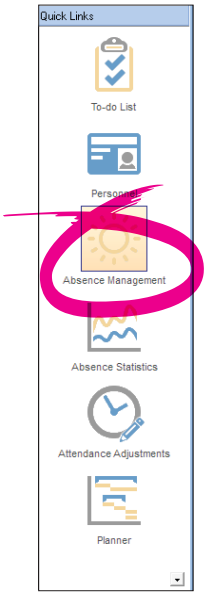
Selecting a personnel return to work incident enables the user to record the points discussed in the actual return to work interview. Click <Ok> to return to the 'To-Do' List screen.



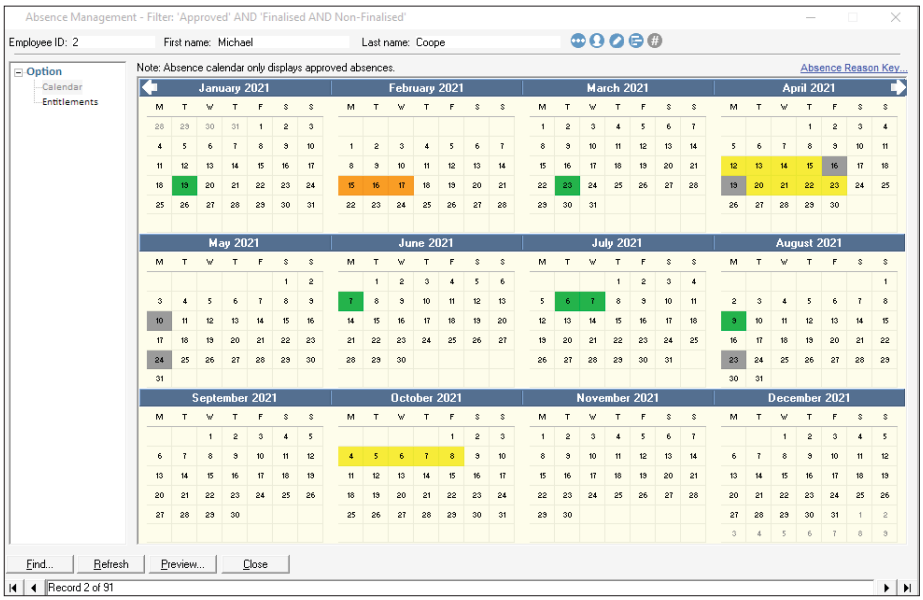
## Module:

# m/03/150
# Viewing a person's absence and holiday entitlement

**1.** Click on the Absence Management Quick Link.




**2.** The Absence Management screen appears at the record last viewed by the user



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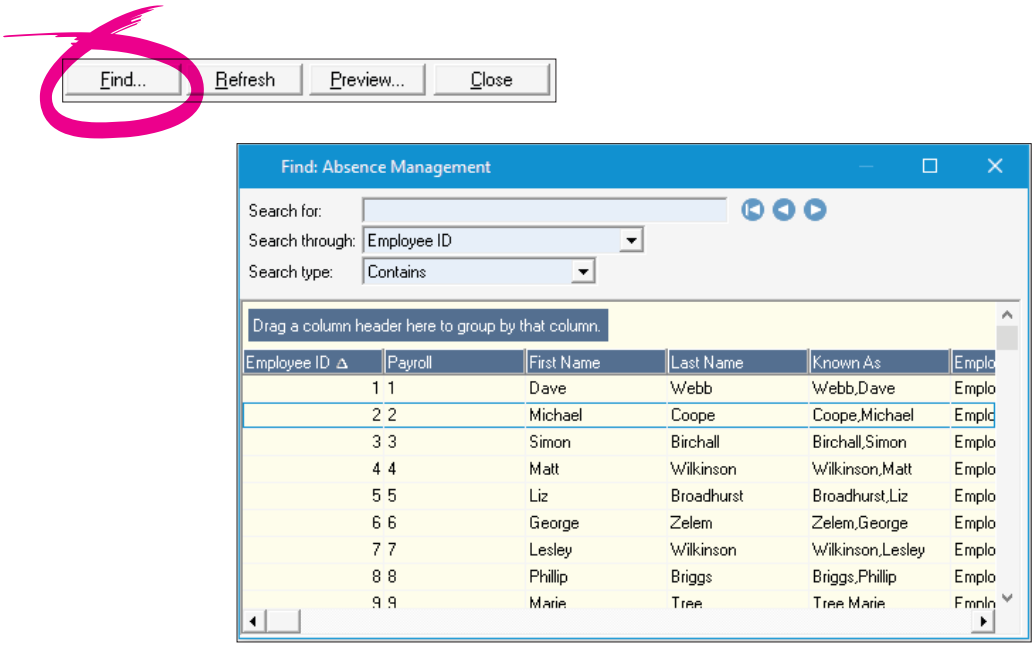
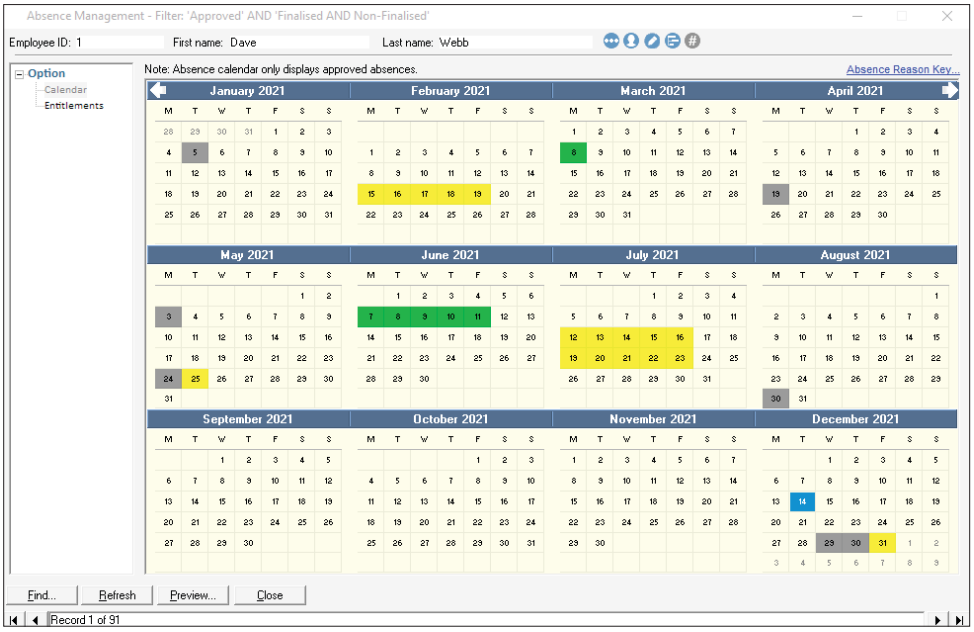
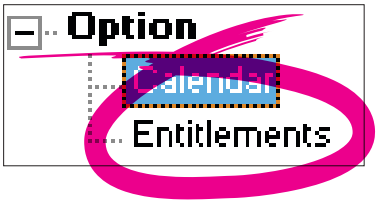
**3.** Click <Find> and search for the person whose entitlements you wish to view.



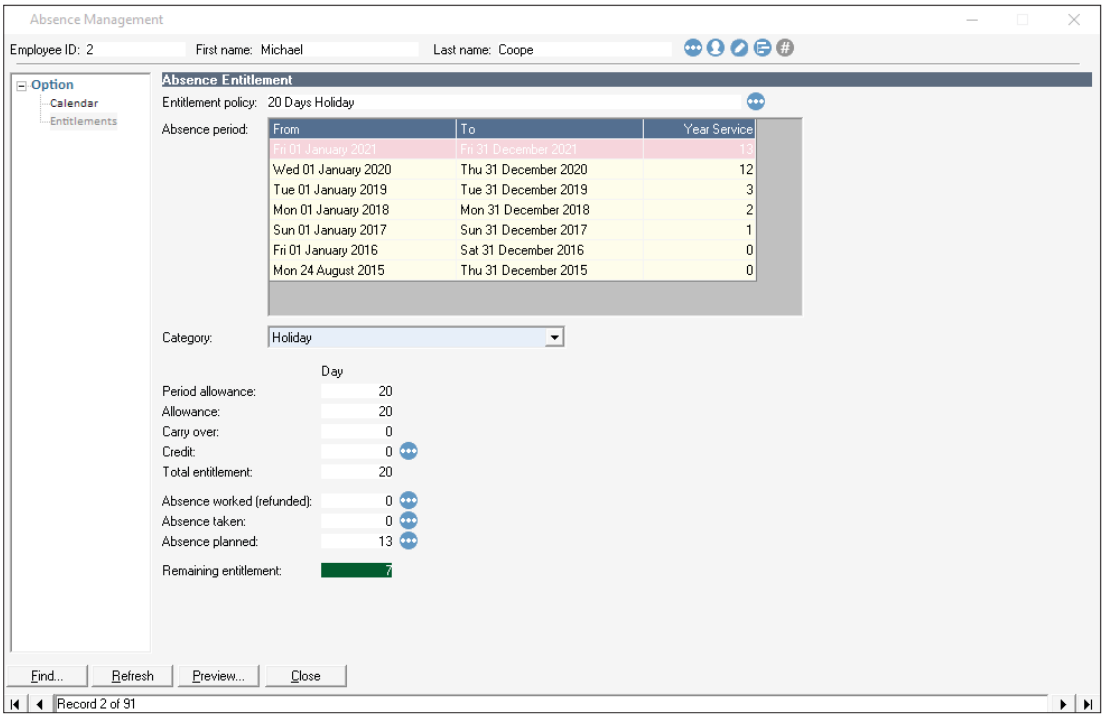

**4.** The person's absence calendar will appear.




Next, click on Entitlements.



**5.** The screen will then change to display the person's absence and holiday entitlements.




Any of the ten categories can be displayed

**6.** Click <Close> to leave Absence Management.

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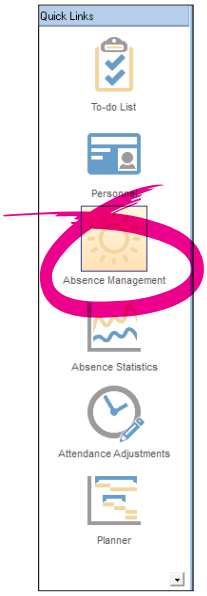
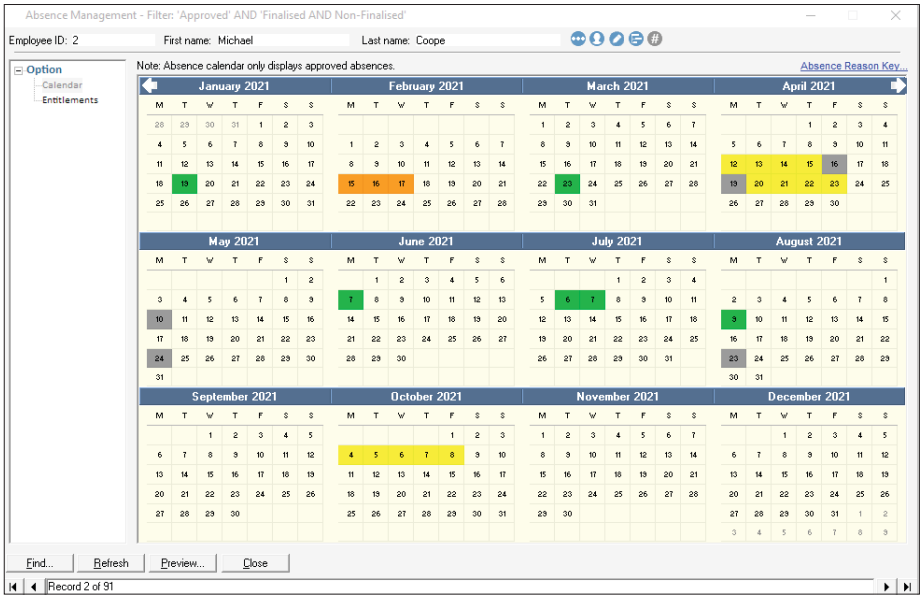
## Module:

# m/03/160
# Awarding an absence entitlement credit in days and hours

**1.** Click on the Absence Management Quick Link.




**2.** The Absence Management screen appears at the person last viewed by the user



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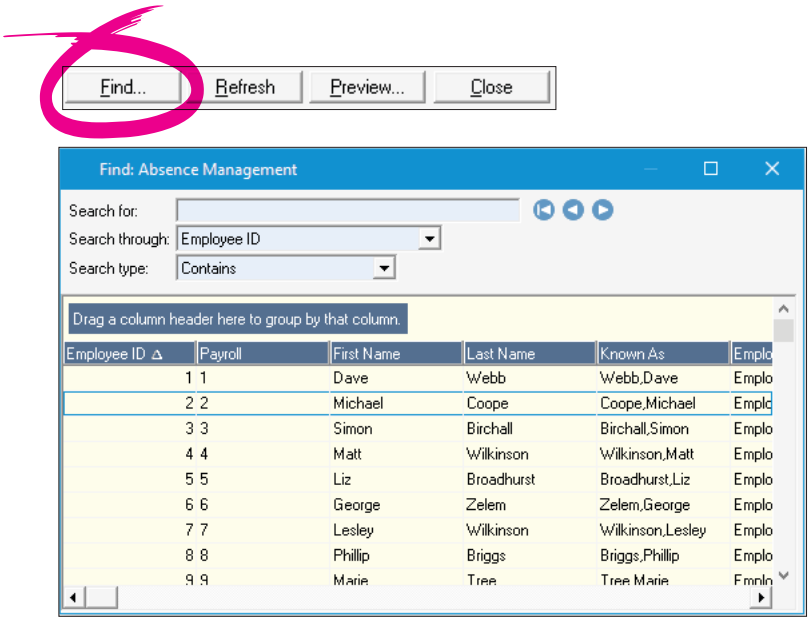
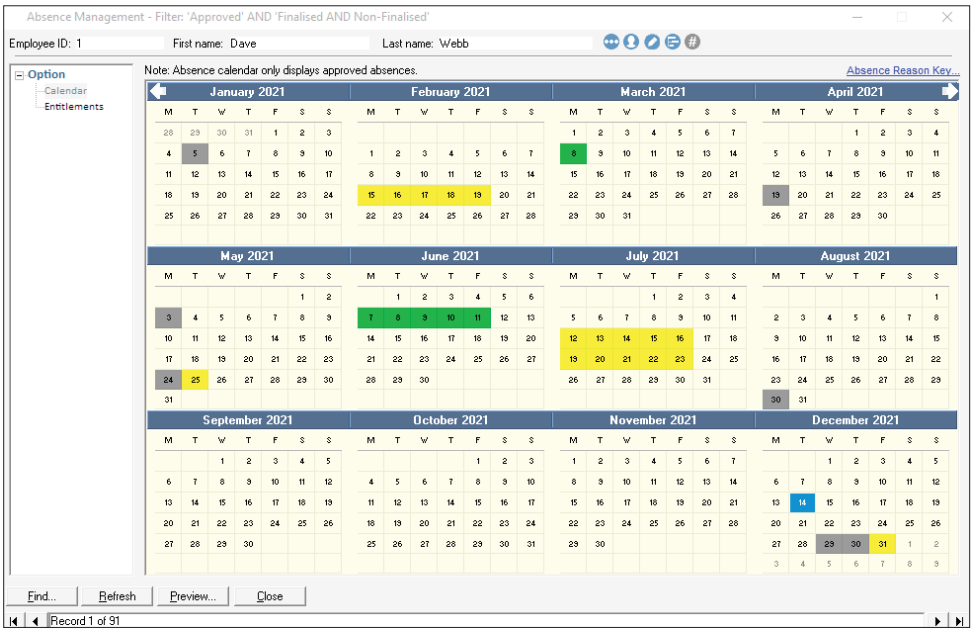
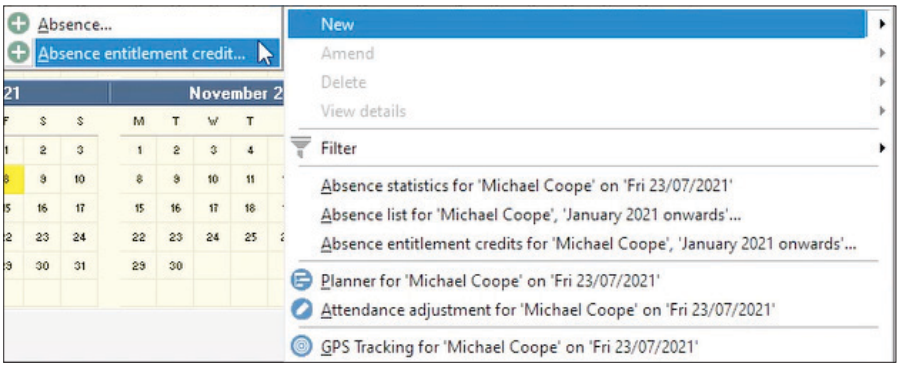
**3.** Click <Find> and search for the person whose entitlements you wish to view.



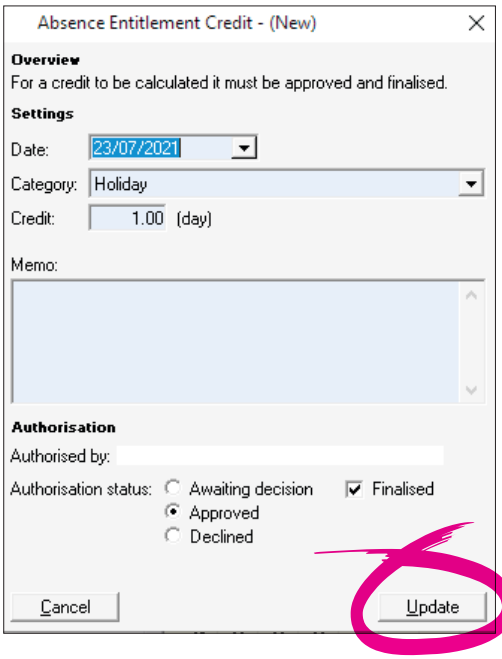

**4.** The person's absence calendar will appear.

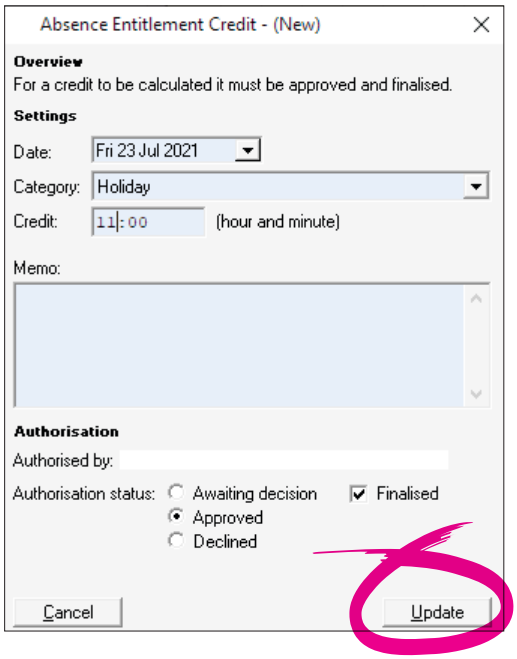


**5.** To award an absence entitlement credit, <Right-click> on the required date and select <New>, Absence entitlement credit.




**6.** Next, the Absence Entitlement credit form will appear.




Simply select the date and absence category along with the amount of credit to be awarded. The memo field is optional but it is recommended that a reason for the credit is described within.

Depending on how your system is configured will depend on if the credit is in days or in hours.

Finally, select <Update> to save the credit.

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