

Absence Manager for Lotus Notes User Manual

Lotus. software



Table of Contents

1	Introduction	Page 2
2	Set-up Instructions	Page 3
3	Installation Instructions	Page 5
4	Create Leave Request	Page 6
5	Cancelling a request	Page 8
6	Bank / Public holidays	Page 9
7	Reporting Module	Page 12
8	Shared Calendar	Page 12
9	Define working week pattern	Page 13
10	Modify dates for existing requests	Page 14
11	Lock Request Months	Page 15
12	Record & Display in Days OR Hours	Page 16
13	Automated Accrual of leave time	Page 17
14	Include / Exclude weekends when requesting leave	Page 18
15	Change users holiday entitlements	Page 20
16	Change a users name	Page 21
17	Restricting the available Leave Types for users	Page 22

Introduction

Absence Manager is a Lotus Domino-based Application, which automates the process of managing absences from work. Absence Manager records and manages absences for any reason, including vacation, holidays, sickness, training, appointments, unpaid leaves, and more.

A central calendar details all absences and fully integrates with personal calendars. It also shows the daily percentage coverage of each department for the current and upcoming years, provides detailed statistical information about absences throughout the organization, and automatically calculates the Bradford Factor to identify attendance problem areas.

Benefits

- ❖ Optimise time management
- ❖ Improved planning & scheduling.
- ❖ Absenteeism Analysis & Trends.
- ❖ Maintenance of accurate records.
- ❖ Increased Control.
- ❖ Reporting Module / Excel compatible
- ❖ Provides a central calendar to all employees showing who is absent throughout the year.
- ❖ Fully integrates with your personal calendar (no design changes required to mail template).
- ❖ Greatly simplifies the process of managing employee absence, one click approval/denial of requests (multiple approvers) with or without comments.
- ❖ Provides an extensive audit trail of employee holidays/absence.
- ❖ Employees have instant access to the number of holidays they have left for the year.
- ❖ Lotus Notes AND web interface
- ❖ Compatible with Notes/Domino R5 / R6 / R7 / R8

Set-up Instructions

Requirements:

Lotus Notes version 5.x, 6.x, 7.x or 8.x

Before you begin...

It is good practice to first plan your users groups and the approvers for those groups before setting up the application; most companies create different groups for each department / section.

You should also decide on the different types of Leave you want to record as these should be set-up before creating / loading your users.

To view the leave types that come preconfigured select Show Me \ Leave Types, you can then edit any attributes of the existing leave types.

To create new leave types select Create \ Leave Type.

Once you have your groups / group approvers finalized use the Create \ User Group menu option to create your groups / users.

Alternatively you can use the Microsoft Excel import tool to load all your users in one go, to use the import tool select Administration \ Import Users.

Note that an Administrator can edit all attributes for a user at any time by opening their record from the Show Me \ Users view; attributes, which can be changed at any time, include things such as:

- User Type
- Approver(s)
- Leave entitlements
- Group calendars available to the user

The admin tools (Administration \ User Maintenance) and (Administration \ Group Maintenance) can be used by an administrator to quickly change attributes for users or an entire group of users, you should use these tools to perform tasks such as moving a user from one group to another or to change the approver(s) for an entire group.

You should ensure you have two users who have Administrator set as their user type on their user record (that way is an Administrator accidentally removes their own admin rights another administrator can reinstate them).

Note – most settings in Absence Manager are cascaded as follows:

Global Settings
Leave Type Record
User Record

In other words most settings defined in the Global settings or Leave Type forms can be overridden for individual users by opening their individual user record Show Me \ Users.

As an example on the Leave Type form you specify the default entitlement – for example 20 days holiday; this value can be override for an individual by opening their user record and clicking on the action button labelled View or Change Entitlements.

Installation Instructions

NOTE: If security warnings appear whilst installing / using Absence Manager you must click Trust Signer, this will update your ECL to allow the application to function correctly.

Extract the database file from the zip file to your server's data directory - the database should be installed on a server.

Sign the database using domino administrator with the current server id or your own id if you are an administrator.

Modify the database ACL as follows:

All users must have editor access; uncheck all other privileges e.g. ensure they are NOT able to delete documents.

ADMINISTRATORS should have Manager access and be able to DELETE documents - so check the box to give them the ability to delete documents.

Ensure Anonymous have no access

The user who will be the Administrator for the Application should then open the database and follow the instructions in the set-up wizard, which will automatically launch.

The setup wizard will run automatically the first time you open the Absence Manager database, the wizard will create a simple base configuration with one administrator (the id of who ever runs the wizard) belonging to the administrators group.

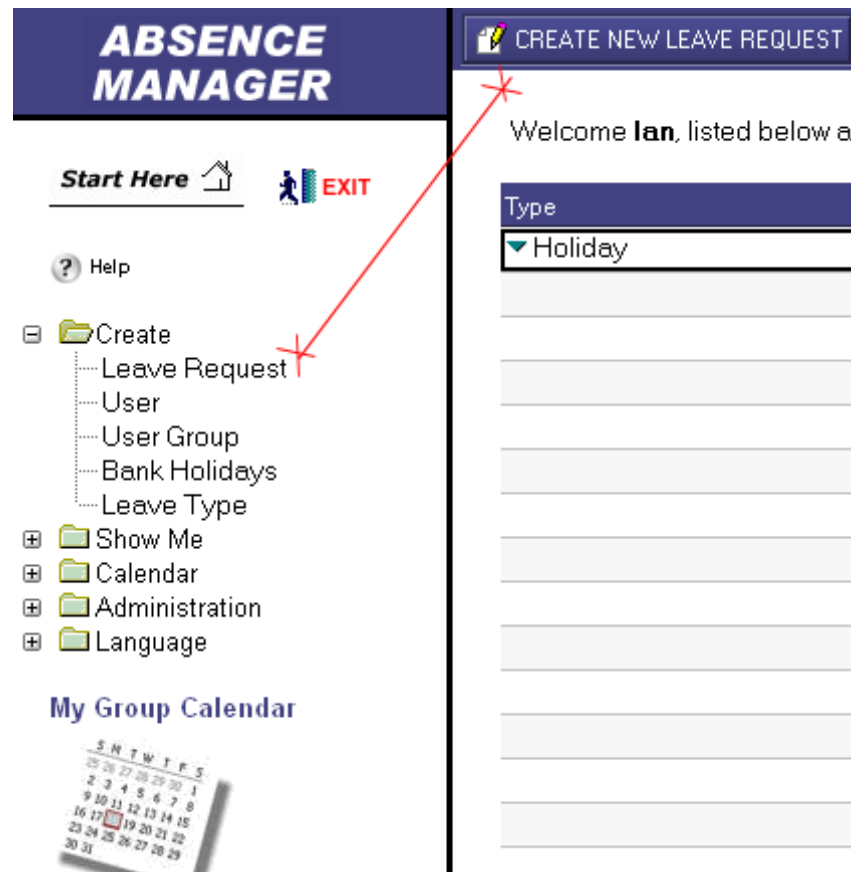
Once the setup wizard has successfully completed, you must close and re-open the Absence Manager database to allow the system settings to be refreshed.

You MUST then select Resign Agents from the Administration Menu in Absence Manager; this will set the scheduled agents used by the Application to run on the current server. The administrator who carries out this step must have access privileges to run scheduled Lotusscript agents on the server on which Absence Manager is installed.

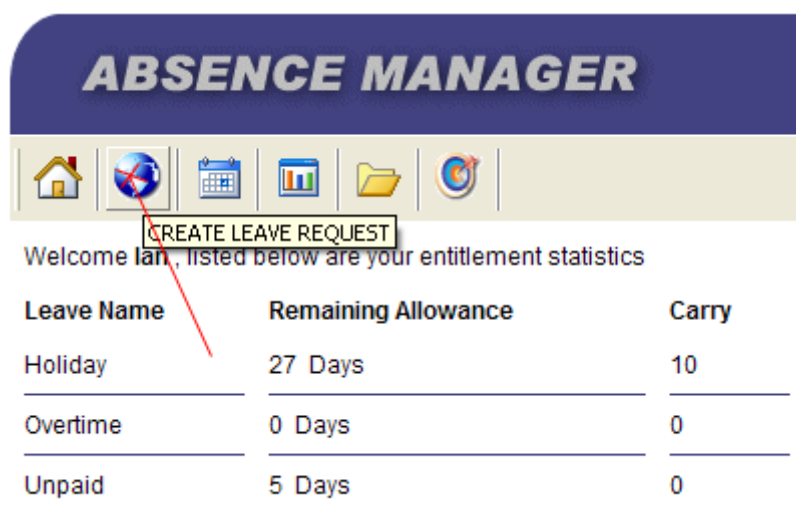
Select create User Group from the menu and create a user group for each Group/Department of people who will be using the Application.

Create Leave Request

If using the Lotus Notes interface, from the 'Create' menu, select 'Leave Request' or click the Create New Leave Request button. (See screen shot below)



If using the web interface click “create new leave request” icon (see screen shot below).



The Leave Request form will be displayed..

If using the Lotus Notes interface click the button labelled Select Leave Type, if using the web interface select the leave type you wish to book and click Next.

A dialog box is displayed, and you must enter the following information. The information requested will depend on the leave type you have selected:-

Start Date

End Date

Full Day / Half Day

Number of hours

Click Next after selecting your start and end dates and the system will calculate the total number of days or hours required taking into account public / bank holidays and weekends.

Next click Submit for approval, this will send an email to your approver(s) requesting that the leave request is approved or denied.

When the request is approved or denied you will receive an email notification, if the request is approved you will also receive another email which when opened will populate your personal calendar with the leave details.

Cancelling a request

From the list of your requests, double-click to open the request you wish to cancel.

Click the 'Cancel Request' button. You will be asked to confirm your action. Click 'OK' to continue with the cancellation or 'Cancel' to quit.

If this was an approved request, the request status will be changed to 'Cancelled' and the number of days leave will be subtracted from the number of days leave you have taken for the appropriate year.

If the request was still awaiting approval, the status will be changed to 'Withdrawn'. and the number of days leave will be subtracted from the number of days requested but not yet approved for the appropriate year.

Your approver(s) will receive an email notifying them that you have cancelled the request.

Bank / Public holidays

Absence Manager allows you to specify Bank / Public holidays, if you have different groups that have different bank / public holidays you can also create specific bank / public holidays that apply to only those groups.

1. Creating one set of common bank holiday dates for all Absence Manager users.

From the 'Create' menu, select 'Bank Holidays'. The 'Bank Holiday Dates' form will be displayed. Leave the 'Groups' field as 'Default' and enter the year.

An error occurs if a default bank holiday document already exists for the selected year. Use the date picker icon to select the bank holiday dates or enter the dates directly.

For your own convenience and for clarity, you may also change the name of any bank holiday. Save and close the document.

For UK installations, default bank holiday dates and names are defined as follows:-

New years day - defaults to 1st January
 Good Friday
 Easter Monday
 May Day - usually the first Monday in May
 Spring bank holiday - the last Monday in May
 Late Summer bank holiday - the last Monday in August
 Christmas Day - defaults to 25th December
 Boxing Day - defaults to 26th December.
 additional fields are provided to allow for additional bank holidays which may be announced from time to time. e.g. 4th June 2002 which was designated a bank holiday for the Queen's golden jubilee.

For US installations, default bank holiday dates and names are defined as follows:-

New years day - defaults to 1st January
 Martin Luther King's Birthday
 Washington's birthday
 Memorial Day
 Independence Day
 Labor Day
 Columbus Day
 Veteran's Day
 Thanksgiving
 Christmas Day - defaults to 25th December
 as for UK installations, additional fields are provided to allow for additional bank holidays which may be announced from time to time.

Please note that as a minimum you should have default bank holiday records for the current and next leave years.

Creating bank holiday documents for specific user groups.

From the 'Create' menu, select 'Bank Holidays'. The 'Bank Holiday Dates' form will be displayed. Select the user group(s) to which this set of bank holiday dates will apply. Enter the year. An error occurs if a bank holiday document already exists for the selected year for one of the chosen groups. Use the date picker icon to enter the bank holiday dates for the selected year or enter the dates directly. Save and close the document.

For your own convenience and for clarity, you may also change the name of any bank holiday on all bank holiday dates forms

Reporting Module

To access the reporting module click the target icon in the web interface (see screen shot below).

ABSENCE MANAGER

Home | Global | Calendar | Reports | Folder | User | **Reports**

Reports

Include Employee Code Simple My Report Current Year Show report as HTML

☐ Dental Appointment ☐ Holiday ☐ Sickness Notification ☐ Unpaid
☐ Doctors Appointment ☐ Overtime ☐ Training

Show report as HTML
Export to Excel

Reports can be exported directly to Microsoft Excel or viewed in the web browser.

First select the detail you want to see in the report, simple gives entitlement and remaining balance – detailed gives additional details such as carried over leave and approval status etc.

Next select the scope for the report, this can be for all users, an individual user, all members of a group or all the users who's requests you approve.

Next select the date range for the report – this can be for the current leave year, next leave year or you can specify a date range such as all sickness in August.

When you are ready click the Run Report action button.

Shared Calendar

The shared calendar displays all approved leave records and is accessible in both the Lotus Notes Client and the web interface.

The shared calendar can be filtered to display different groups depending on access rights:

By default normal users can view all approved leave requests for members of their own group.

Users who are approvers can view the Approvers shared calendar, this lists all requests they approve.

Users who are classed as Administrators on their user record can view all user groups and records.

Additionally any user can be given additional access rights to view any group calendars of interest; this is achieved by editing their user record as follows:

Select Show Me \ All Users

Put the user record in edit mode (double click anywhere on the record) then select the second tab "Calendar Control" this is where specific calendar access is set; you can either give the user access to specific groups by checking those groups and then saving their record or give the user access to ALL groups by setting the first option (view all groups) to Yes.

See the screen shot below:

Save and Close Add Deputy Change Username View or Change Entitlements View or Change Carry Over

User Record Andrew Dea

User | **Calendar Control** | Approvers | Current Year Summary | Monthly Totals | Next Year Summary | Monthly

Calendar Control

View ALL groups on the shared calendar: ☒ Yes ☐ No

This will allow the user to view ALL requests for all groups on the shared calendar

Check additional group calendars this user can view:

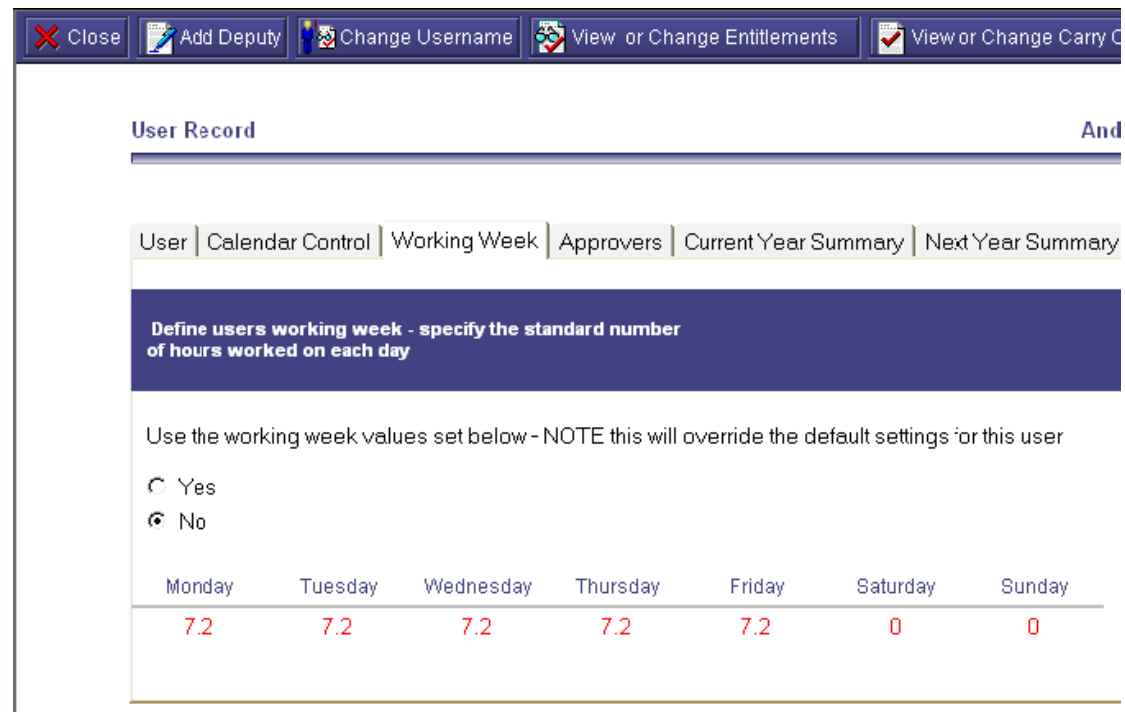
☐ Accounts ☐ Administrators ☐ SALES ☐ Tch pubs

Define working week pattern

You can specify the working week for users by opening their user record

– Show Me \ Users and double clicking on their record.

Next open the third tab “Working Week” – see below:



User Record

Close Add Deputy Change Username View or Change Entitlements View or Change Carry Over

Working Week

Define users working week - specify the standard number of hours worked on each day

Use the working week values set below - NOTE this will override the default settings for this user

☐ Yes
☒ No

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7.2	7.2	7.2	7.2	7.2	0	0

To activate using a specific working week pattern for this user change the radio button option to Yes and then enter the hours the user works on each day of the week.

If this option is set to Yes Absence Manager will use this working week pattern when calculating days used when requesting leave.

If the radio button is set to No the default options will be used, these can be:

Include weekends in date calculations

Exclude weekends in date calculations

Prompt user whether to include weekends in date calculations

The above settings are dictated by the value in the global settings, Administration \ Global settings (second tab)

Modify dates for existing requests

To allow users to modify the start and end dates for requests they have made you must turn this option on in the global settings – Administration \ Global Settings Tab 3:
See the screen shot below:



With this option turned on users can modify existing requests provided the request start date is still in the future.
This is a useful feature for leave requests such as sickness notifications when the request dates may need to be extended.

Lock request months

If you want to temporarily lock a particular month to prevent users from requesting leave that falls in that month this can be achieved by an Administrator accessing the global settings, Administration \ Global settings and selecting the “Settings 4” tab – see screen shot below:



The screenshot shows a window titled "Database Configuration" with a blue header bar. Below the header, there are four tabs: "Settings 1", "Settings 2", "Setting 3", and "Settings 4". The "Settings 4" tab is selected and highlighted. In the top right corner of the window, there is an "OK" button. Below the tabs, a red note states: "NOTE: Locking months will prevent users from requesting leave during the specified month(s)." Below the note is a table with 12 rows, each representing a month. Each row has a label "Lock [Month]" and two radio buttons labeled "Yes" and "No". The "No" radio button is selected for all months except October, where the "Yes" radio button is selected.

Month	Yes	No
Lock January	<input type="radio"/>	<input checked="" type="radio"/>
Lock February	<input type="radio"/>	<input checked="" type="radio"/>
Lock March	<input type="radio"/>	<input checked="" type="radio"/>
Lock April	<input type="radio"/>	<input checked="" type="radio"/>
Lock May	<input type="radio"/>	<input checked="" type="radio"/>
Lock June	<input type="radio"/>	<input checked="" type="radio"/>
Lock July	<input type="radio"/>	<input checked="" type="radio"/>
Lock August	<input type="radio"/>	<input checked="" type="radio"/>
Lock September	<input type="radio"/>	<input checked="" type="radio"/>
Lock October	<input checked="" type="radio"/>	<input type="radio"/>
Lock November	<input type="radio"/>	<input checked="" type="radio"/>
Lock December	<input type="radio"/>	<input checked="" type="radio"/>

If any of the months are set to Yes users are prevented from creating requests for those months.

This can be useful if you need to temporarily freeze a month whilst calculating salary.

Record & Display in Days OR Hours

Absence Manager enables you to record and display different leave types in either days or hours.

Each leave type recorded using Absence Manager has a corresponding leave type record, on this record you simply specify which time duration to use to record and display time for that particular Leave Type; for example you may want to allocate training time off in Hours and Vacations in Days - Absence Manager provides an extremely flexible solution supporting your changing business needs over time – see screen shot below

✖ Close
✔ Save and Close
📋 Copy DOCUNID to clipboard

Leave Type Record

Specify leave type name: 『Vacation』

Record and display in the following time format:

☒ Days
☐ Hours

Who is this leave type available to?:

☒ Everyone
☐ Only Approvers

Does this request type require the user to enter a reason?:

☐ Yes
☒ No

Automated Accrual of leave time

Absence Manager allows for the Accrual of leave days / hours each month. Each leave type recorded by Absence Manager has a corresponding leave type record, on this record you specify whether the leave accrues time each month, days OR hours will be accrued each month for the leave type if this functionality is activated - see screen shot below:

► Show available Icon information

Should this leave type be included in the Bradford Factor Calculation?: ☐ Yes ☒ No

Should this leave type be displayed on the shared calendar?: ☒ Yes ☐ No

Does this leave type accrue additional Days each month? ☒ Yes ☐ No

How many Days should be accrued each month?

Depending whether the leave type is set to record and display in Days or Hours will determine whether days or hours are accrued each month, see the following page for further information

Include / Exclude weekends when requesting leave

Absence Manager allows for the following scenarios when determining whether to included / exclude weekends when calculating time off.

1. Always include weekends when calculating time off.
2. Never include weekends when calculating time off
3. Prompt the user to specify whether to include weekends in date calculations.

How Absence Manager handles weekend calculations is determined by the administrator see the master settings screen shot below:

Database Configuration	
Settings 1	Settings 2
Users can define their own approvers	<input checked="" type="radio"/> Yes <input type="radio"/> No
Appointment cards required?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Action Logging required?	<input checked="" type="radio"/> On <input type="radio"/> Off
Include weekends when calculating time off?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Prompt User
All users are Notes users?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Leave year start date	13/10 16
At year end reset current year and next years allowances to the current value for.	<input type="radio"/> Current Year Entitlements <input checked="" type="radio"/> Next Year Entitlements
Carry over cut-off date	31/12 16
Hours in a working day?	8
Update Approver calendar?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow users to cancel Approved requests	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show End Date time options on leave requests	<input checked="" type="radio"/> Yes <input type="radio"/> No

If the master setting dictates that the user is prompted they will see the screen below when requesting leave, see screen shot below:

Absence Manager - Select Dates

Vacation

Include Weekends in date calculations? ☒ Yes ☐ No

Does this request span more than 1 day? ☒ Yes ☐ No

Start Date: 19/10/2005 16

End Date: 21/10/2005 16

☒ Full Day
☐ Half Day
☐ Quarter Day
☐ Select Hours

☒ Full Day
☐ Half Day
☐ Quarter Day
☐ Select Hours

Number of Days:

Next > **Cancel**

Change users Holiday / Leave entitlements

Absence Manager allows you to specify a default leave allowance for each type of leave, this is specified on the Leave Type record(s) which can be edited by an Administrator selecting Show Me \ Leave Types and opening the leave record to be modified.

Leave entitlements can also be easily changed for an individual person; this is accomplished by opening the user record Show Me \ Users and double clicking on the persons record to open their user document.

With the user record open to change Holiday / Leave entitlements click the Action button labelled View or Change Entitlements (see screen shot below).

You will then be presented with a window similar to the screen shot below:

Select the Leave type you want to change (in this case Vacation) and click the OK button.

You will then be able to enter the new entitlement for this leave type in the following input screen.

Enter the new entitlement and click OK – the user's entitlement is now updated and you can close their user record.

Change a user's name

If you need to change a user's name, if for instance they are married and have a different surname carry out the steps below:

Open the person's user record, Show Me \ Users and double click on their record in the view to open; next click the change user name action button and enter their new user name (save and close the record).

You must then update their existing leave requests to associate them with their new user name, to accomplish this:

Select Show Me \ All Requests

Select all requests that are in the old name for the user who's name you are changing.

Click the action button labelled "Change owner for selected records" and you will then be prompted to select the new user name to change the records ownership to.

Restricting the Leave Types available to users

Absence Manager allows you to restrict the Leave Types available to users in two ways.

Leave types can be restricted based on length of service or you can restrict leave types for particular users directly on their user record.

Restricting a leave type based on length of employee service.

This functionality is useful in situations where certain leave types for example additional holidays are available to employees who have been with the company for 2 years is to be automatically handled.

You must ensure that the **hire date** for all employees is defined on their user record (as this is used for calculating years of service) – see the screen shot below:

☒ Save and Close
 ☐ Change Username
 ☐ View or Change Entitlements
 ☒ View or Change Carry Over Figures

Additional Rights:

☐ Manage all users
 ☐ Manage users whos requests this person appri
 ☐ View reports for ALL Users

User can book holidays by the hour?:

☒ Yes
 ☐ No

User can specify hours which make up a working day?

☐ Yes
 ☒ No

Note - only set this to yes for users who do NOT work the standard 7.2 hour day and who are authorised to specify the number of hours in a working day themselves.

Leave Year Start date for this user:

Note - For this to override the default setting the Use individual leave year start dates for users option must be enabled in the global settings

Web date format:

☒ DD/MM/YYYY
 ☐ MM/DD/YYYY

Note - this overrides the global settings web date format for this user

Carried over leave to be taken by:

December 2006

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	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

Users Mail type:

Employee ID:

Hire Date:

☒ Thu 14/12/2006

Company Code:

To restrict a certain leave type based on length of employee service you simply edit the leave type record and specify the criteria on the leave type record.





To access the leave type records an administrator selects Show Me \ Leave Types and double clicks on the leave type record to be edited.

You then specify that the leave type is restricted based on length of service and specify the range of year's service required for the leave type to be available to users at run time, see the screen shot below:

1 – To restrict the leave type set this to yes

2 – Specify the years of service range here (Note this can be a decimal value such as .5 for 6 months).

In the example below if a user had anywhere between 6 months and 5 years service they would be able to select this leave type when creating a request.

 Close
  Save and Close
  Copy DOCUNID to clipboard
  Attach File(s)

Should this leave type be included in the Bradford Factor Calculation?: ☐ Yes ☒ No

Should this leave type be displayed on the shared calendar?: ☒ Yes ☐ No

Does this leave type accrue additional Days each month? ☐ Yes ☒ No

Leave Type is available depending on employee years of service **1** ☒ Yes ☐ No

Leave Type available to employees with the following number of years service based on Hire Date **2** Between and years

Restricting leave types available to a user on their user record

As an Absence Manager administrator you can restrict the leave types available to a particular user by editing their user record.

To access the user record select Show Me \ Users and then double click the user of interest.

You then double click inside the user record to put the record in edit mode and select the Second Tab (Leave Types).

See the screen shot below:

By default **1** is set to Yes (all leave types available) If **1** is set to No you then specify **2** below the leave types that will be available to the user at run time when they request time off.

Save and Close
 Change Username
 View or Change Entitlements
 View or Change Carry Over Figures

User Record
Andrew De:

User | Leave Types | Calendar Control | Working Week | Approvers | Current Year Summary | Next Year Summary

Leave types available to this user?

Are ALL leave types available to this user?:

☐ Yes
 ☒ No **1**

Note: even if this is set to Yes the user will only have leave types that require a certain length of service available at run time if they have the necessary years of service as defined by the Hire Date field (see the user tab).

Select Available Leave Types:

☒ Dental Appointment
 ☒ Doctors Appointment
 ☐ Overtime
 ☒ Sickness Notification
 ☐ Training
 ☒ Travel
 ☒ Unpaid
 ☒ Vacation

2