



PlanningPME

Schedule easily

## Holidays and days off tracking

### I. Description of this function

PlanningPME helps you control your employees’ days off (holidays, illness, parent leave...).

You can enter the number of days off for all your employees or for each employee individually.

A report shows you your employees’ days off history.

### II. Days off management

#### 1. Create unavailabilities

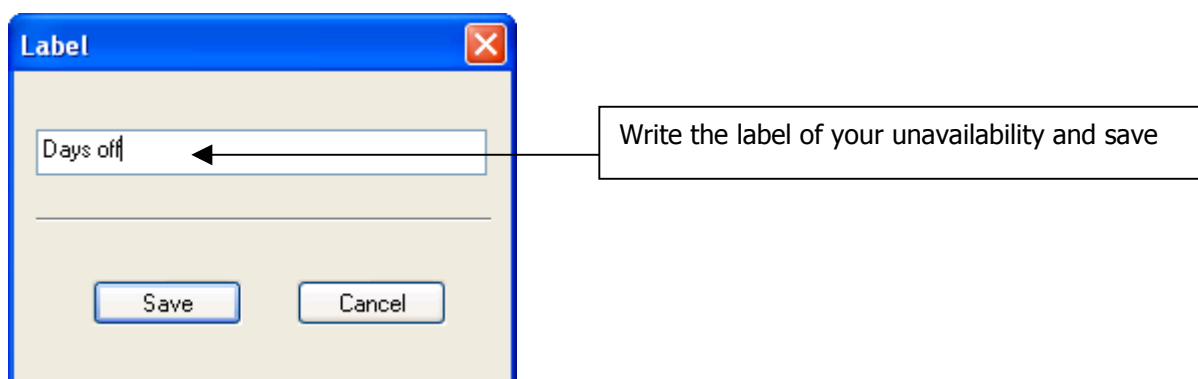
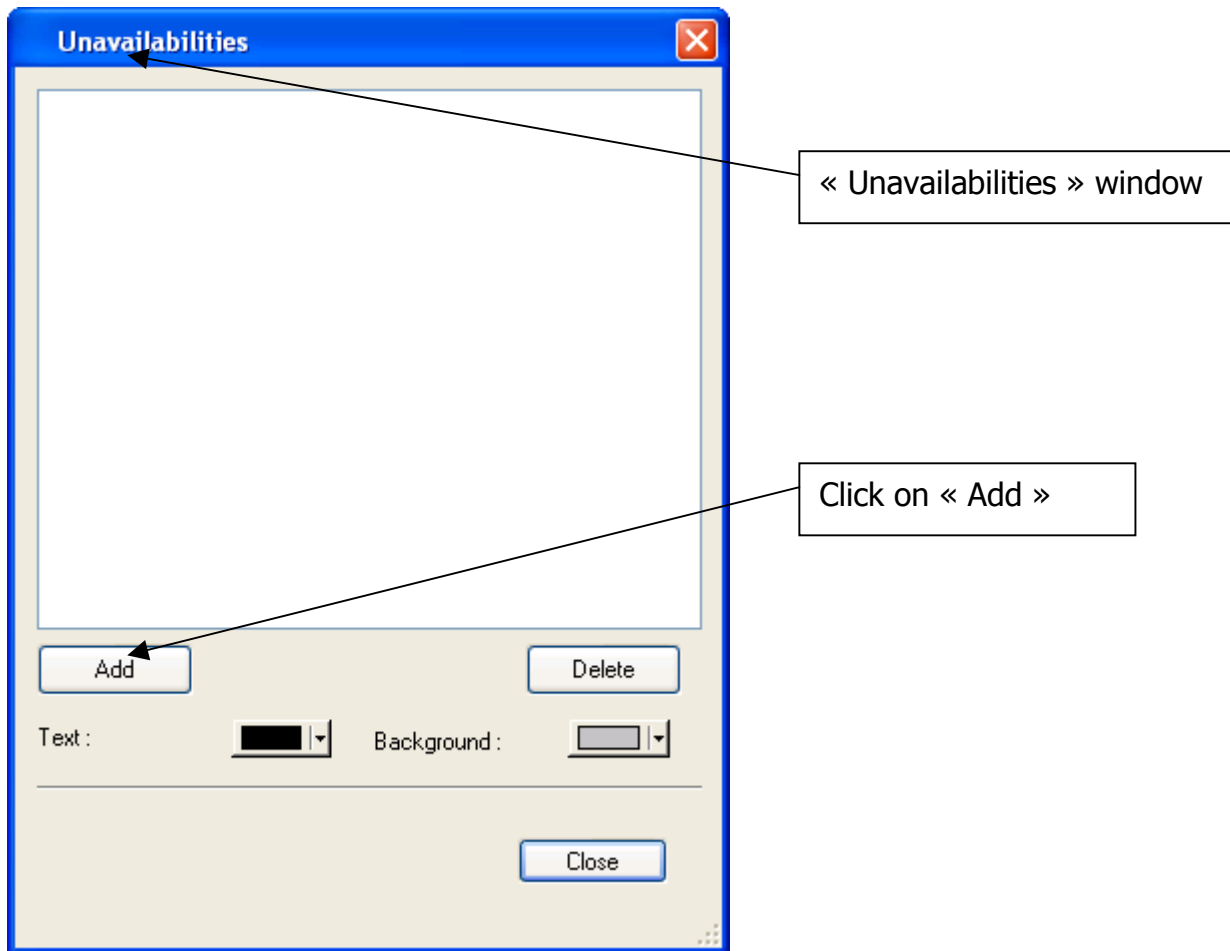
From PlanningPME, Go to “Data” -> “Unavailabilities”

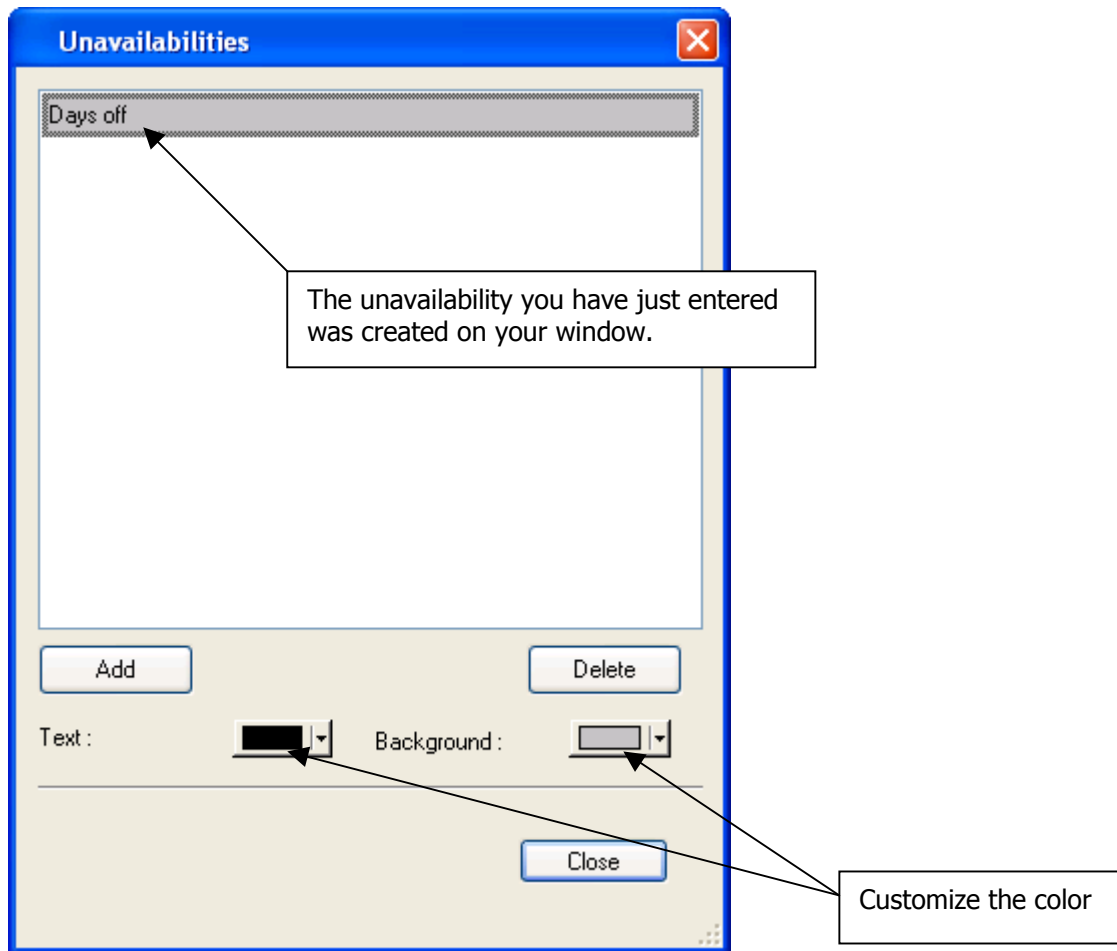
The screenshot shows the PlanningPME software interface. The title bar reads "PlanningPME - C:\New schedule.pp". The menu bar includes "File", "Edit", "View", "Data", and "Tools". The "Data" menu is open, showing options: "Departments", "Skills", "Resources", "Teams", "Clients", "Groups", "Users", "Task", "Categories of task", "Description Task", "Unavailabilities", "Public holidays", and "Additional data". The "Unavailabilities" option is highlighted. The main window displays a calendar for August 2004, showing Week 34 (Aug 20-22) and Week 35 (Aug 23-25). The calendar grid has rows for employees: Laura, John, Paul, Rebecca, and Car. The columns represent days of the week: F (20), S (21), S (22), M (23), T (24), and W (25). The grid cells are currently empty, indicating no unavailabilities are tracked for these dates.



The "Unavailabilities" window appears.

Here is the way to proceed to create unavailability.

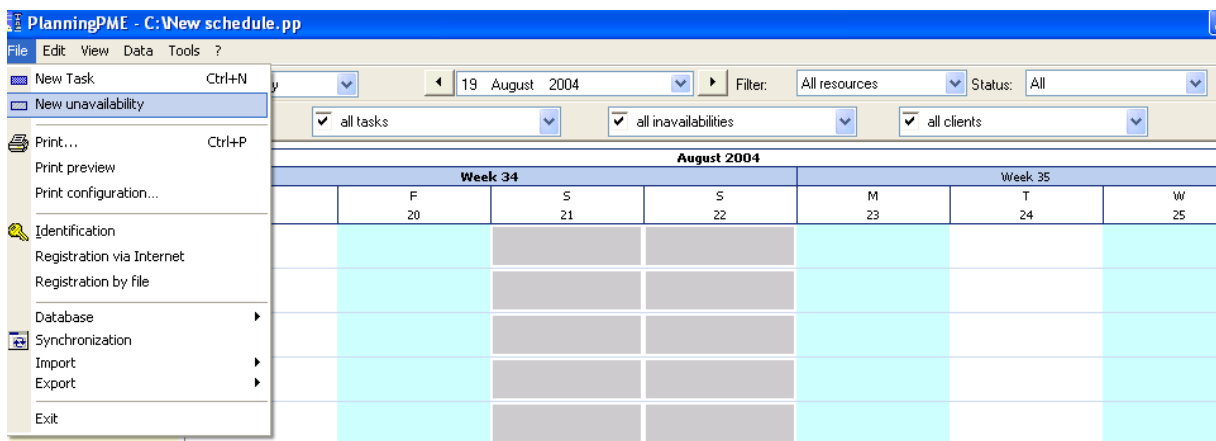




To customize the color of your unavailability, select it and choose the color of the text and background.

**Affect unavailabilities to your resources:**

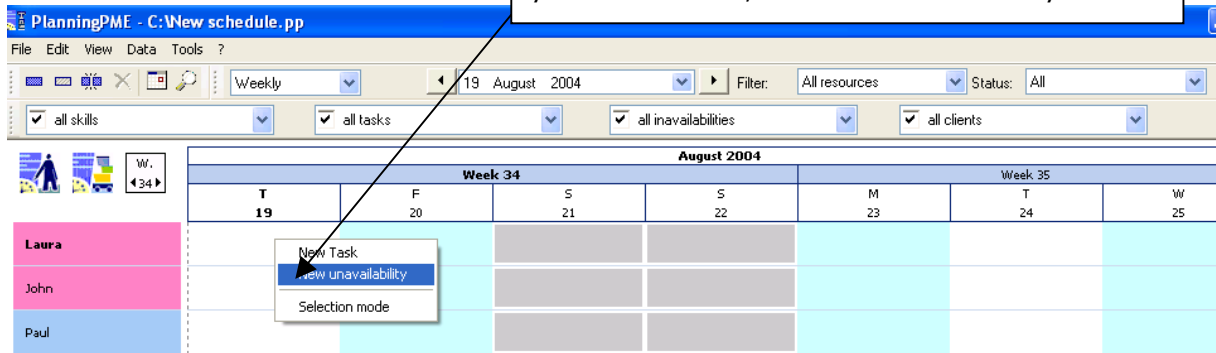
You can either go to "File" -> "New unavailability"



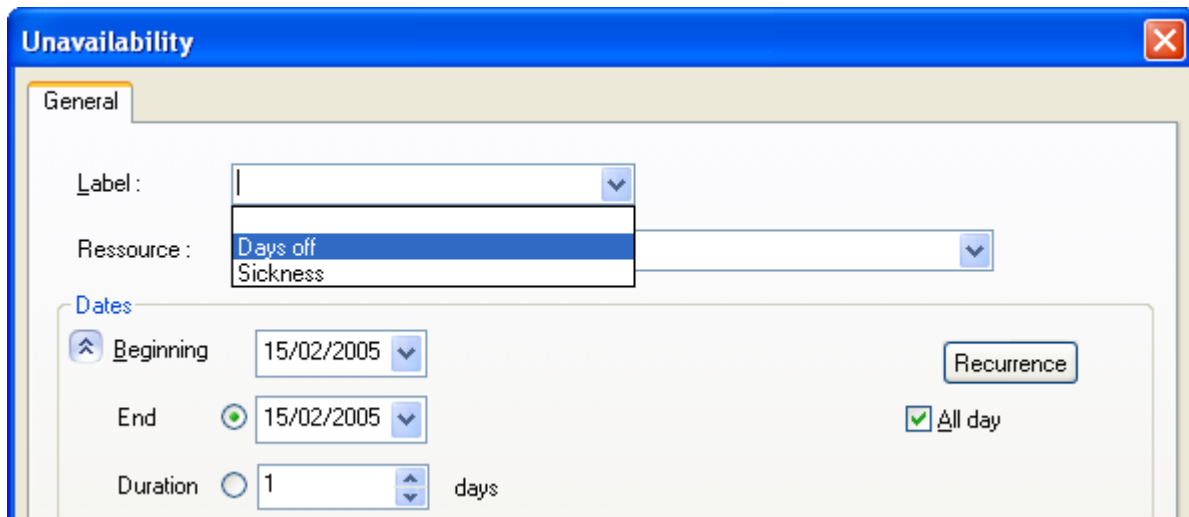


Or

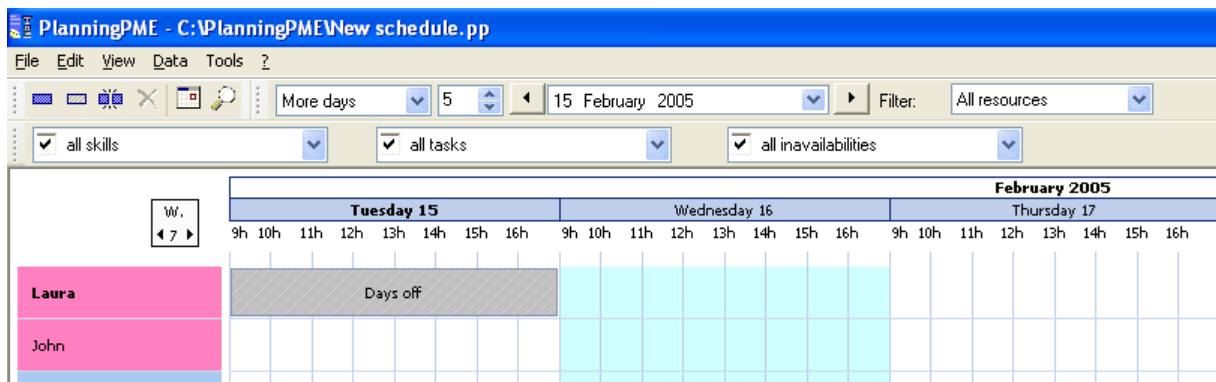
Put your mouse on the schedule and click right on your mouse. Then, select “new unavailability”.



The following window appears. You just have to choose your unavailability and enter dates and hours as when you create task.



Results on the screen:

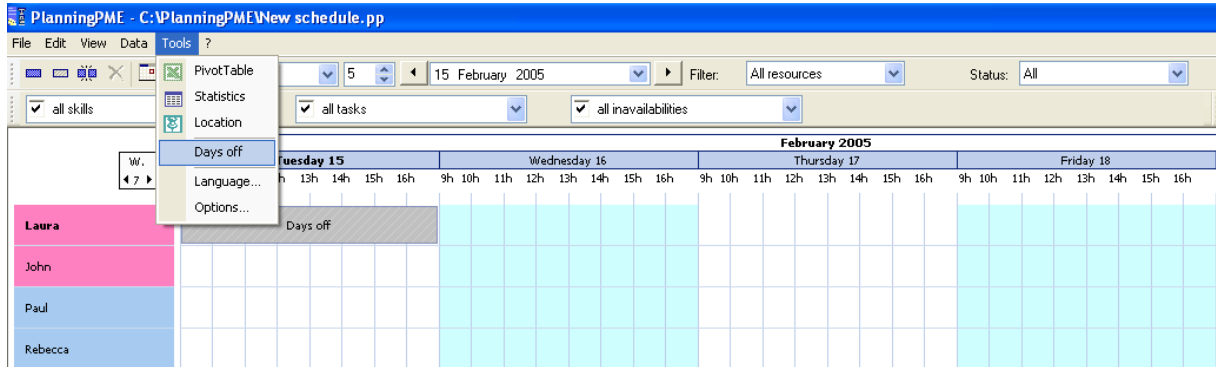




## 2. Days Off set-up

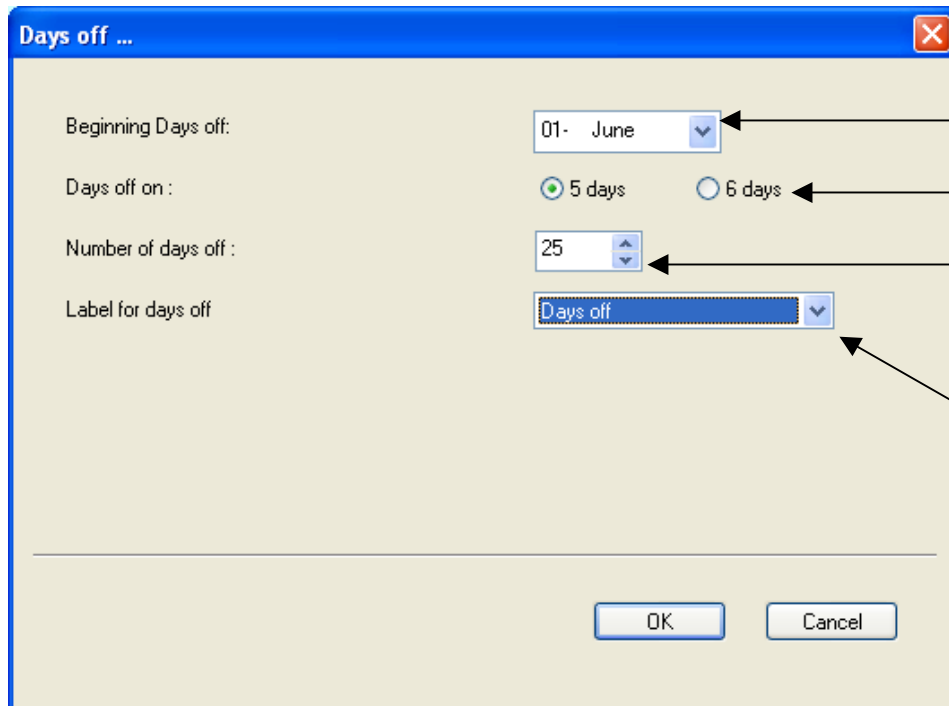
### 2.1 General set-up

Go to the menu « Tools » -> « Days Off ».



The following window appears:

Fill in the information depending on your activity.



From which day are calculated your days off?

On 5 or 6 days?

Indicate the number of days off by year for your office.

Choose the label « Days off » for your statistics.

### 2.2 Setting by employee

Double click on the box of one of the employees on the left column. The personal card of the employee appears.



Choose the tab « Unavailabilities ».

The following window appears:

Unavailability	Day(s)	Period
Days Off	2/25	01/06/2004 - 31/05/2005
Illness	1	01/06/2004 - 31/05/2005
Repair	0	01/06/2004 - 31/05/2005

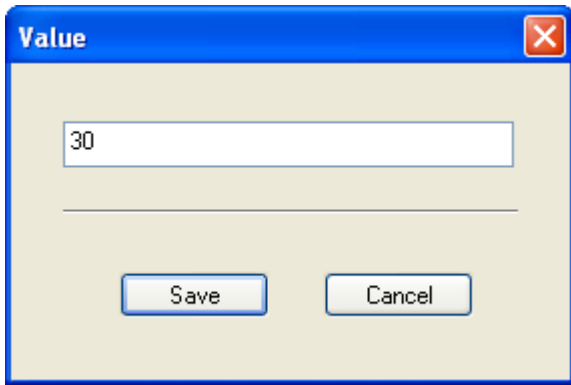
On the above example:

The employee was ill one day and took 2 days off.

You can change the number of days off for this employee:

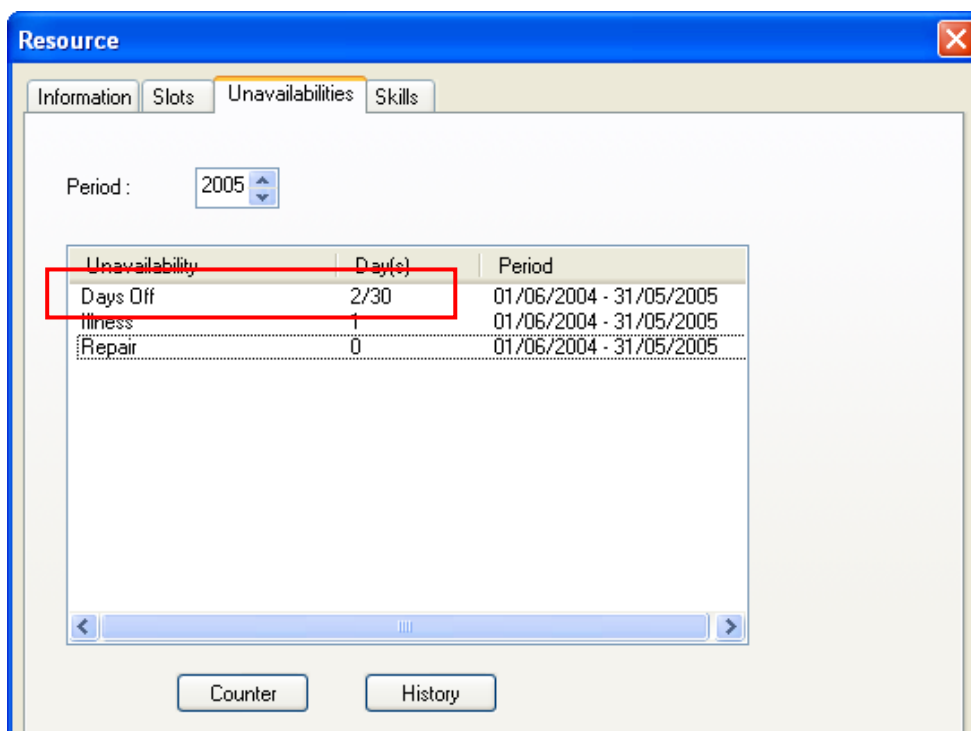
Click on one of the label, as an example « Days Off » and click on the button “Counter”.

This window appears:



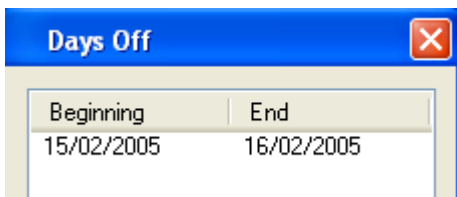
Enter the number of days off allowed for this employee: in this example, 30.

This modification appears on the personal card of your resource.



On the above example, the employee has 30 paid days off from the 1st of June 2005 to the 31 of May 2005.

If you want the dates of those days taken, you can double click on the line of the unavailability. The following information window appears:

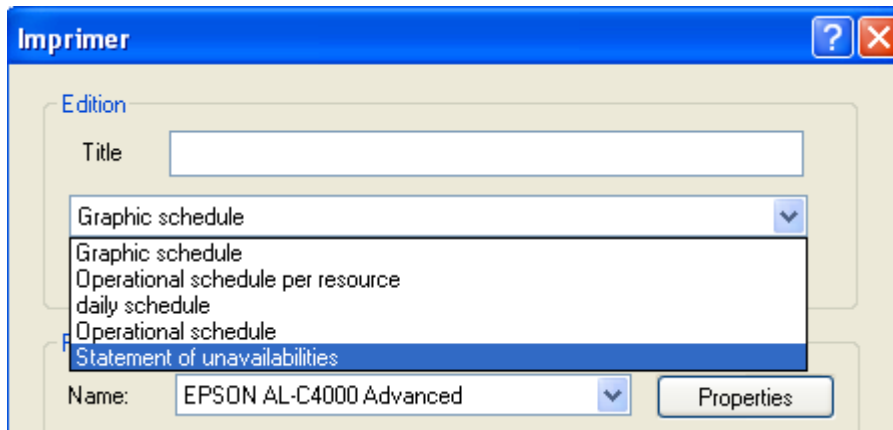


The employees was off on the 15<sup>th</sup> and 16<sup>th</sup> of February.

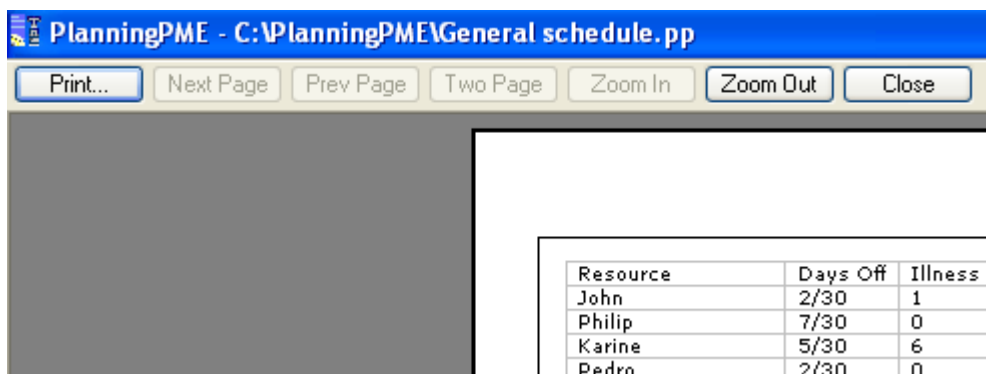


### 3. Days Off printing

You can have access to the number of Days Off remaining for each employee going to the menu « File » -> « Print ».



Choose « Statement of unavailabilities ». Then, click on the preview, you will have the number of days off and unavailabilities for each employees.



On this example, John took 30 days off on 30 and was ill one day.

#### To go further...

You have access to much more statistics using Excel Pivot Table: [See function card 30: Pivot Table.](#)

### III. Contact PlanningPME

For any help or information, we are at your disposal.



## **PlanningPME**

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<http://www.planningpme.com>

### TARGET SKILLS

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