

Attendance Planner – Stand-alone Version

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Attendance Planner

The Attendance Planner is an adaptable application which you can use for vacation scheduling, shift planning or rosters.



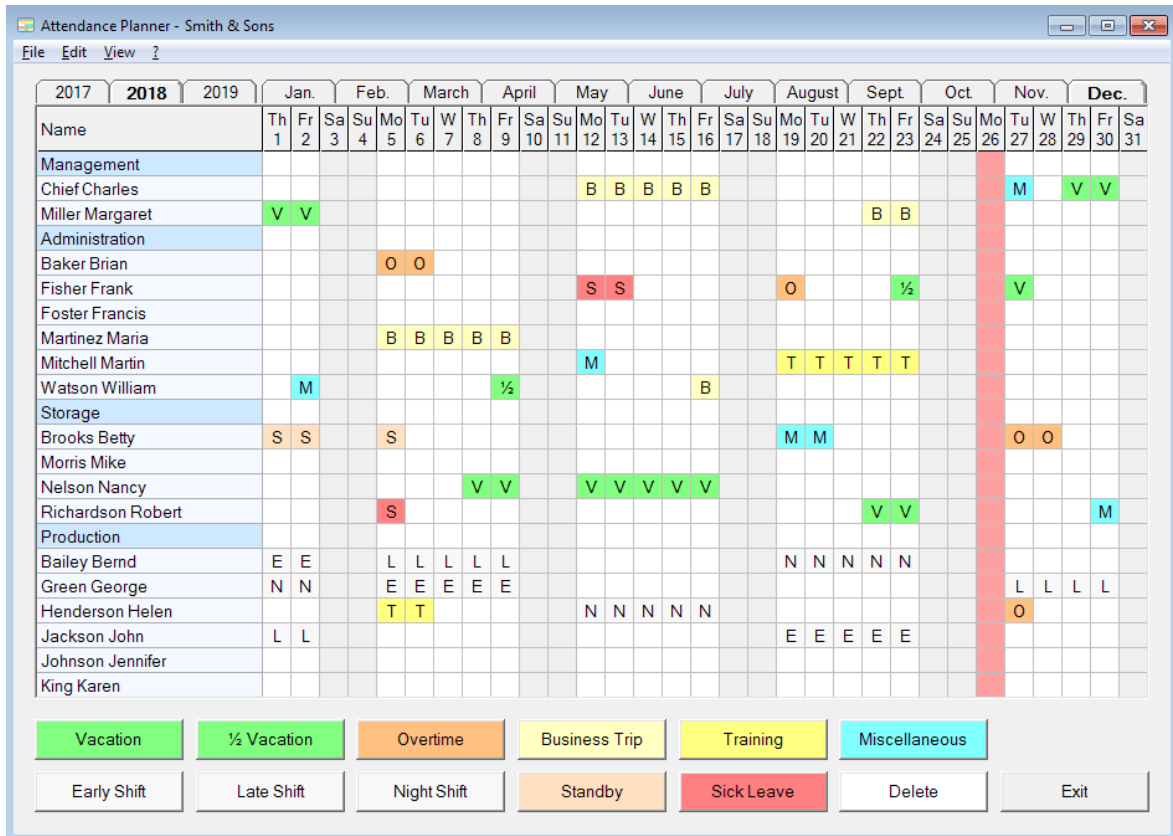
Attendance can be recalled going back to the beginning of the last year. Entries can be made in advance up to the end of the next year.

At the beginning of a new year the program automatically switches one year onward. The program is thereby usable for all subsequent years without the necessity of manual intervention. The attendance of the year before last year is deleted at the beginning of a new year.

The number of buttons for the 'reasons for presence/ absence' as well as their description and color design can be freely determined.

Startup

The attendance of the current month is displayed following the program startup.



Depending on the display resolution the buttons describing 'reasons for presence or absence' are displayed at the lower or right-hand edge of the window. The current day column is highlighted in color.

The register cards near the top of the screen can be selected in order to view attendance in different months.

Many useful keyboard shortcuts, for example to set the width of the buttons or the line height, can be found in the pdf file [▶ Shortcuts](#).

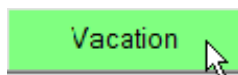
Making Entries

Entries are made as follows:

- Mark the desired period with the mouse

Name	Tu 1	W 2	Th 3	Fr 4	Sa 5	Su 6	Mo 7	Tu 8	W 9	Th 10	Fr 11	Sa 12	Su 13	Mo 14
Chief Charles										T	T			
Miller Margaret														
Administration														
Fisher Frank														
Foster Francis														
Martinez Maria														S
Mitchell Martin														

- Click on the button with the desired reason for presence or absence



- The appropriate code letter is entered

Name	Tu 1	W 2	Th 3	Fr 4	Sa 5	Su 6	Mo 7	Tu 8	W 9	Th 10	Fr 11	Sa 12	Su 13	Mo 14
Chief Charles										T	T			
Miller Margaret														
Administration														
Fisher Frank	V	V	V	V			V	V	V	V	V			
Foster Francis														
Martinez Maria														S
Mitchell Martin														

You can mark several days at once. The marking can also extend over weekends and holidays.

Copying and inserting entries

You can mark entries, copy them to the clipboard and insert them as often as you want:

- Highlight the entries which you would like to copy with the mouse.
- Right-click the mouse whilst pressing the CTRL key (the marked entries are transferred to the clipboard)
- Right-click the mouse, whilst pressing the SHIFT key, on the field in which you would like to insert the entries.

- The entries will be inserted beginning from the clicked cell.

You can mark several lines at once. Copied entries can also be inserted in other months.

The button which is operated last is always automatically copied to the clipboard. Instead of consecutively using the same button for single days, you can depress the SHIFT key and right-click with the mouse on the desired cell. You therefore need not repeatedly click on the button for each entry.

Undo/Redo

You can undo your last entry by pressing CTRL + Z. You can press CTRL + Z several times to undo multiple steps. You can redo an undone action by pressing CTRL + Y.

Comments

You can provide entries with comments:

- Mark the desired entry with the mouse

Name	Tu 1	W 2	Th 3	Fr 4	Sa 5	Su 6	Mo 7	Tu 8	W 9	Th 10	Fr 11	Sa 12	Su 13	Mo 14
Chief Charles														
Miller Margaret	V	V												
Administration														
Foster Francis				M										
Martinez Maria										T	T			
Mitchell Martin														

- Right-click on the entry with the mouse

Attendance Planner - Comment

Foster Francis

OK

Comment for 04/11/18

Cancel

Text of Comment

- Enter the comment into the window which opens now

Entries with comments are displayed in bold. You can display existing comments by moving the mouse over it.

Name	Tu 1	W 2	Th 3	Fr 4	Sa 5	Su 6	Mo 7	Tu 8	W 9	Th 10	Fr 11	Sa 12	Su 13	Mo 14
Chief Charles														
Miller Margaret	V	V												
Administration														
Foster Francis				M										
Martinez Maria										T	T			
Mitchell Martin														

If entries are changed or deleted the appropriate comment is also deleted. Comments are not copied along when you are copying entries.

You can undo your last entry by pressing CTRL + Z. You can press CTRL + Z several times to undo multiple steps. You can redo an undone action by pressing CTRL + Y.

Employees

You can enter your employees' data with the menu option **Edit - Employees**.

The screenshot shows a window titled "Attendance Planner - 27 Employees". It contains a table with the following columns: Name, Temporarily employed from / to, Residual leave, and Vacation entitlements (2017, 2018, 2019, 2020). The table is organized into sections: Management, Administration, Storage, and Production. The current line is highlighted in blue.

Name	Temporarily employed from / to	Residual leave	Vacation entitlements
			2017 2018 2019 2020
>Management			
Chief Charles		10.0	30 30 30 30
Miller Margaret		18.0	29 30 30 30
>Administration			
Baker Brian		5.0	30 30 30 30
Fisher Frank		0.0	24 26 26 26
Foster Francis		5.0	30 30 30 30
Martinez Maria		0.0	28 29 30 30
Mitchell Martin		0.0	28 29 30 30
Watson William		2.0	25 25 25 25
>Storage			
Brooks Betty		2.0	29 29 29 29
Morris Mike		0.0	26 30 30 30
Nelson Nancy		7.0	30 30 30 30
Richardson Robert		0.0	24 24 26 26
>Production			
Bailey Bernd		2.0	29 29 29 29
Green George		7.0	30 30 30 30
Henderson Helen		7.0	26 28 28 28
Jackson John	01/07/17 30/06/18	2.0	27 27 27 27
Johnson Jennifer		0.0	29 29 29 29
King Karen		2.0	30 30 30 30

Control buttons on the right side of the window include: Insert Line, Delete Line, Up arrow, Down arrow, Help ..., Apply, Cancel, and OK.

Click on the field in which you would like to enter or change data. The current line is indicated in color.

A new line can be inserted above the current line using the button **Insert Line**. The current line may be deleted with the button **Delete Line**.

With the buttons **Up** and **Down** you can move the content of the current line a line upward or downward.

Headlines

Headlines can be inserted as follows: Instead of a name enter the character **>** followed by the headline text and leave the other fields of the line empty. The headline is indicated in color.

Temporary employees

The beginning and end of the employment period can be entered for temporary employees. These employees are only displayed in the Planner during the months in which they are employed.

Should the period of employment of a permanent employee begin or end, you need only to enter the start or end date. The second date field can remain empty.

Vacation entitlements

If you wish to use the Vacation Overview (menu option View - Vacation Overview), you can enter the vacation entitlements of the employees. Before you start you should first read the notes in the chapter Vacation Overview.

At the beginning of a new year the vacation entitlements automatically switch over one year and you can enter the vacation entitlements for a further year. You can adopt the vacation entitlements from the previous year by pressing CTRL + ALT and clicking in the column header on the year for which you want to transfer the vacation entitlements from the previous year.

You only need to enter the residual leave when setting up for the first time. It is automatically recalculated after beginning of a new year. The residual leave is always effective of January 1st of the previous year.

Display Groups

In order to avoid paging through long lists of employees, the employees can be divided into groups. If you have selected the option **Use Display Groups** in the menu option **Edit - General Settings - Display Groups**, then you will be provided with an additional menu option **Edit - Display Groups**.

Using the menu option **Edit - Display Groups** you can create a new Display Group by clicking on the button **Add**, and provide the group with a name of your choice.

By inserting headings in the employee data you are able to group your employees. All employees falling under a given heading form a group. For each Display Group created you can determine which groups are able to see.

As soon as you have created more than one Display Group, a new field will be created in the main window allowing you to select Display Groups.

Using the **Rename** button you can provide the selected Display Group with a new name. Using the **Delete** button you are able to delete the selected Display Group.

Reasons for Presence/ Absence

The buttons representing the 'reasons for presence and absence' can be defined using the menu option **Edit - Reasons for Presence/ Absence**.



Code Letter	Button Description	Text Color	Background Color	Preview
V	Vacation	Select a Color ...	Select a Color ...	V Vacation
½	½ Vacation	Select a Color ...	Select a Color ...	½ ½ Vacation
O	Overtime	Select a Color ...	Select a Color ...	O Overtime
B	Business Trip	Select a Color ...	Select a Color ...	B Business Trip
T	Training	Select a Color ...	Select a Color ...	T Training
M	Miscellaneous	Select a Color ...	Select a Color ...	M Miscellaneous
E	Early Shift	Select a Color ...	Select a Color ...	E Early Shift
L	Late Shift	Select a Color ...	Select a Color ...	L Late Shift
N	Night Shift	Select a Color ...	Select a Color ...	N Night Shift
S	Standby	Select a Color ...	Select a Color ...	S Standby
S	Sick Leave	Select a Color ...	Select a Color ...	S Sick Leave
		Select a Color ...	Select a Color ...	

More Presence/ Absence Buttons >> Help ... OK Cancel

For each 'reason for presence/ absence' enter a code letter and descriptive text for the button. You can select text color and background color of each 'reason for presence/ absence' with the button **Select a Color**.

You can use the same code letter for several buttons, but only if you use different background colors.

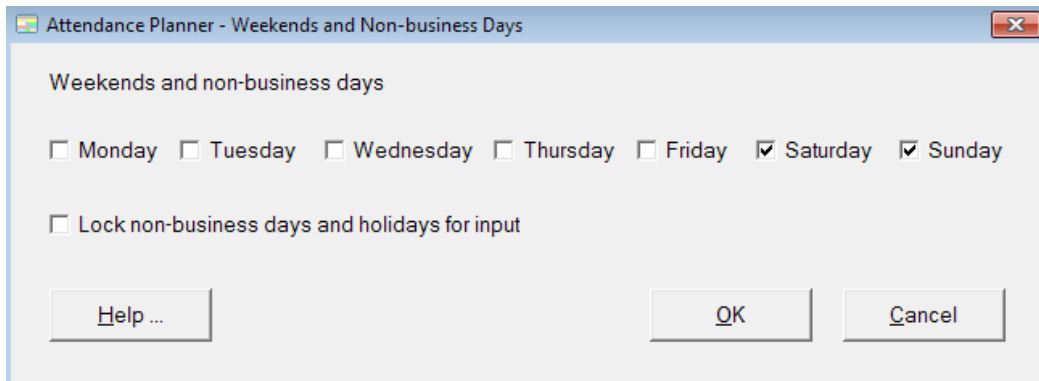
You can delete a button, by deleting the related code letter and the description text.

If you wish to use the Vacation Overview (menu option View - Vacation Overview), you can create buttons for full and half days vacation. Using the menu option **Edit - General Settings - Vacation** you can enter the code letters of the buttons you use for vacation to be counted in the Vacation Overview.

Would you like to change the order of the buttons, you can do this via the menu option **Edit - General Settings - Change arrangement of buttons**.

Weekends

You can determine weekends and recurring non-business days with the menu option **Edit - Weekend**.



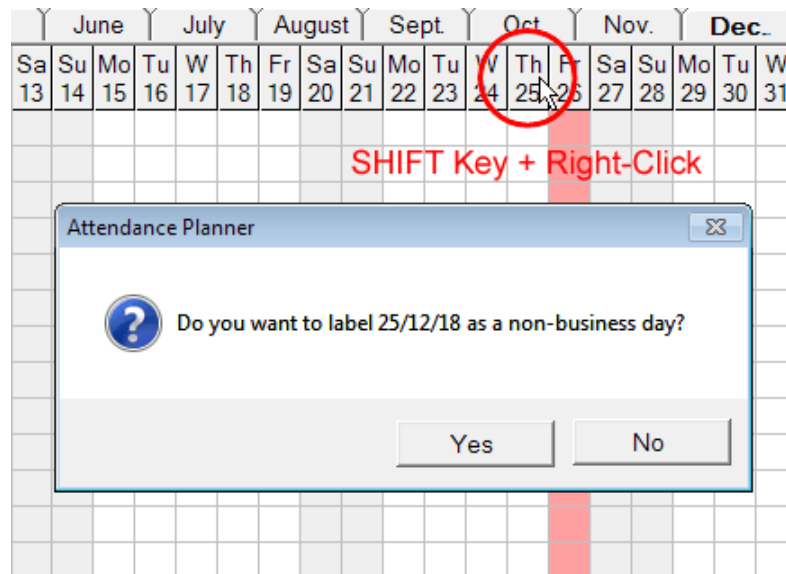
Usually weekends and non-business days are locked for input. If you would like to make entries for these days uncheck the checkbox **Lock non-business days and holidays for input**.

Later modifications (e.g. a restaurant changes its day off) become effective at the beginning of the month in which the change is made. If you have already made entries for future days which now become non-business days you have to correct these days manually.

Non-business Days

Non-working days for all employees

You can block any further day as a non-business day. Right-click the mouse whilst pressing the SHIFT key on the desired day in the heading.



If you have already made inputs for days, which you subsequently blocked as non-business days, you have to correct these manually.

You can cancel the blocked non-business days, by right-clicking the mouse, whilst pressing the SHIFT key, in the heading of the weekday again.

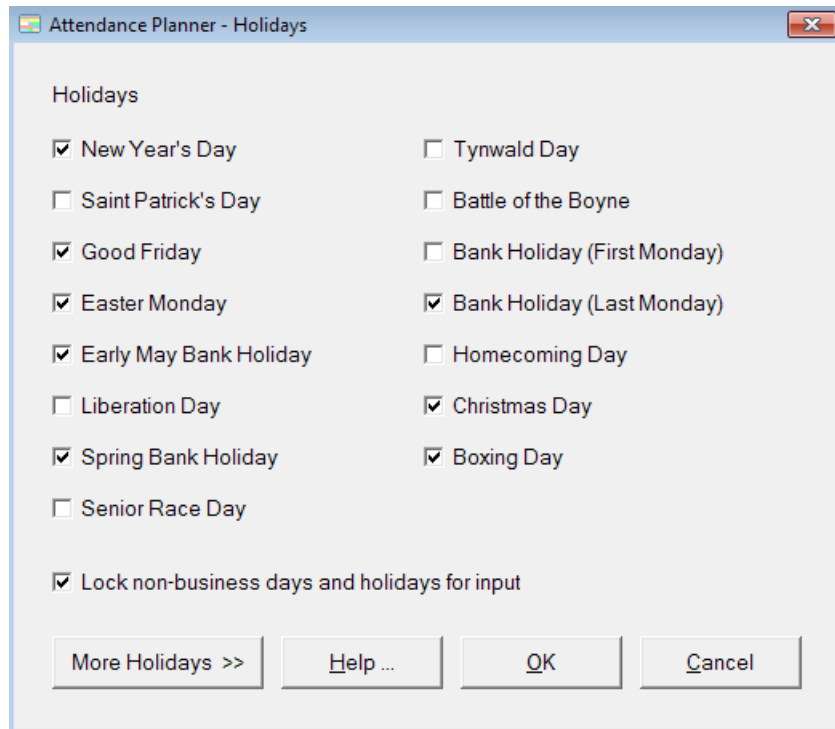
Individual non-working days

You can mark days as non-working day individually for each employee by double-clicking on a cell. The cell is marked like a weekend day and is protected against overwriting by other entries. You can delete a non-working day by double-clicking on the cell again.

You can copy and paste non-working days like other entries. So you can enter the non-working days of part-time employees quickly and easily over a longer period in advance.

Holidays

With the menu option **Edit - Holidays** you can determine days, which will be indicated as holidays in the Attendance Planner.



Holidays are usually locked for input. If you would like to make entries for these days uncheck the checkbox **Lock non-business days and holidays for input**.

You can extend the list with the button **More Holidays** and enter further annually recurring holidays.

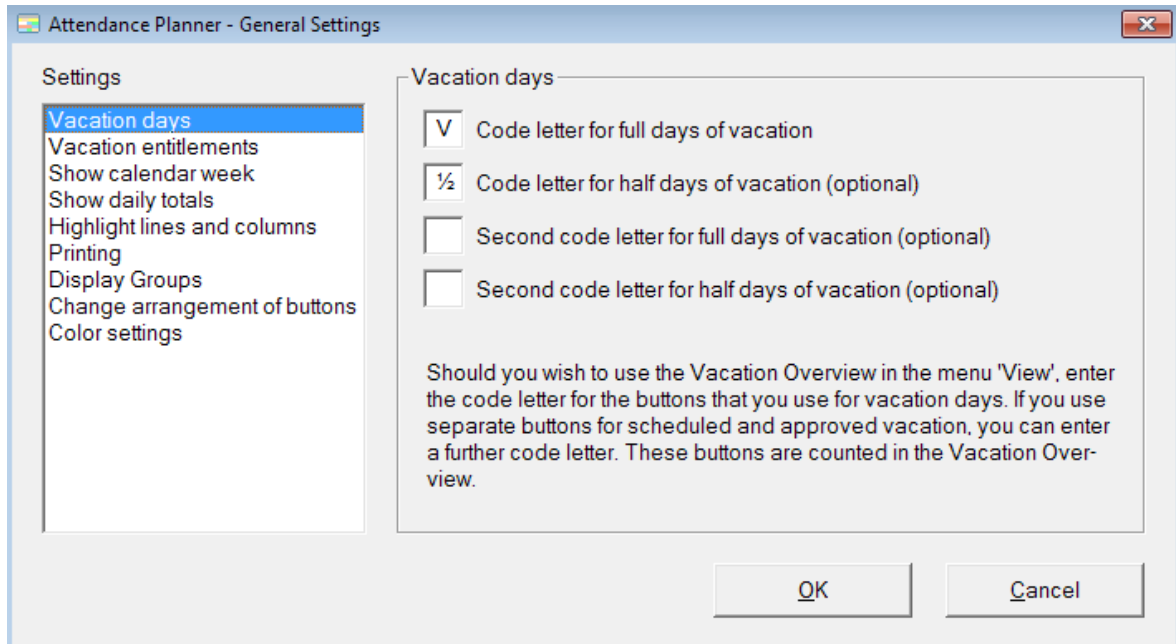
You can also mark days as once-off holidays. To do this go to the main form and right-click the mouse, whilst pressing the CTRL key, in the headline of the desired day.

You can transform the indicated holiday back into a working day, by right-clicking the mouse, whilst pressing the CTRL key, in the headline on the appropriate day again.

If you have already made entries for days, which you have subsequently changed to holidays, you have to correct these manually.

General Settings

You can make the following settings in the menu **Edit - General Settings**:



Vacation days

Do you wish to use the ***Vacation Overview*** in the menu ***View***, you can enter the code letter for the buttons that you use for full and half vacation days. If you use separate buttons for scheduled and approved vacation, you can enter a further code letter. These buttons are counted in the Vacation Overview.

Vacation entitlements

You can specify whether you want to enter vacation entitlements in menu option ***Edit - Employees*** with or without decimal. You can select the beginning of the vacation year and when the residual leave expires.

Show calendar week

You can specify whether the calendar week is displayed in the heading of the monthly overview.

Show daily totals

You can specify for which reasons for presence/ absence you want to display a daily total at the lower edge of the main window.

Highlight lines and columns

You can select whether you want to highlight the current line and column. Furthermore, you can highlight headlines.

Printing

You can select whether grid lines will be printed. When you print the monthly overview you can select whether the calendar week is printed in the heading, and whether a legend of the buttons is printed on the end.

Display Groups

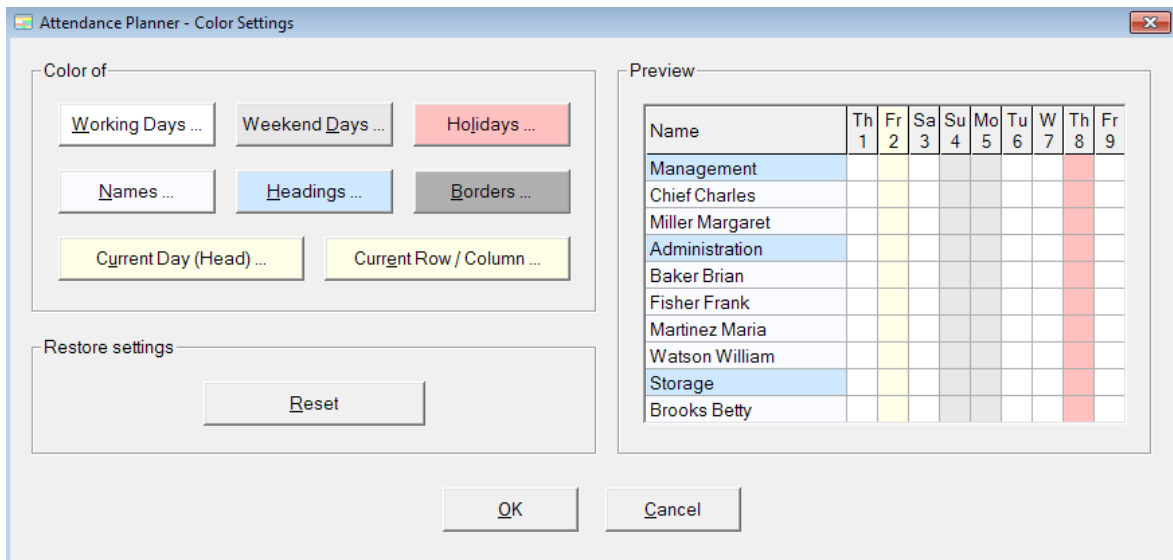
In order to avoid paging through long lists of employees, the employees can be divided into groups. If you select the option **Use Display Groups** the additional menu option **Display Groups** is added to the menu **Edit**.

Change arrangement of buttons

You can change the order of the buttons.

Color settings

You can modify the color settings.



Click a button and select a color. You can see the settings in the preview window on the right-hand side. You can restore the standard settings with the button **Reset**.

Annual Overview

By double-clicking a name or with the menu option **View - Annual Overview** you can display an Annual Overview of each employee.

Attendance Planner - Annual Overview

Annual Overview: 2018 Employee: Chief Charles

Month	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
January								V	V			½							B	B	B	B	B								
February									S	S	S	S	S										T	T	T	T	T				
March		B	B	B	B	B												S	S												
April							V	V	V	V							½		M	M											
May										S	S	S	S	S											O	O	O				
June			M	M	M																										
July	V	V	V										B	B	B	B	B												V		
August																				M											
September							B	B	B	B	B									B	B	B	B	B							
October					M																				O	O	O				
November	V	V	V	½					S	S	S	S	S												S	S					
December							B	B	B												V	V	V	V	V						

Vacation Overview

Carryover 2017	3,0 Days	Used until 24/06/18	7,0 Days	Planned in 2018	12,5 Days
Entitlement 2018	25,0 Days	Residual leave 2018	21,0 Days	Unplanned	8,5 Days
Total	28,0 Days				

Totals

V	½	O	B	T	M	E	L	N	S	S
18	3	6	28	5	7	0	0	0	15	4

Symbols

V	Vacation	½	½ Vacation	O	Overtime	B	Business Trip	T	Training
M	Miscellaneous	E	Early Shift	L	Late Shift	N	Night Shift	S	Standby
S	Sick Leave		Weekend		Holiday				

Print... Close

The Vacation Overview is displayed when a button for vacation is present. More information about the Vacation Overview can be found on the next page.

You can print the Annual Overview for all employees at once by pressing CTRL + SHIFT + P.

Vacation Overview

You can display a vacation summary using the menu option **View - Vacation Overview**.

Name	Carryover 2017	Entitlement 2018	Total	Used until today	Residual leave 2018	Planned in 2018	Unplanned
Management							
Chief Charles	10	30	40	15	25	10	15
Miller Margaret	8	30	38	17	21	11	10
Administration							
Baker Brian	5	30	35	10	25	13	12
Fisher Frank	0	26	26	14	12	11	1
Foster Francis	6	30	36	10	26	18	8
Martinez Maria	0	29	29	8	21	11	10
Mitchell Martin	0	29	29	10	19	10	9
Watson William	2	25	27	11	16	10	6
Storage							
Brooks Betty	2	29	31	8	23	10	13
Morris Mike	0	30	30	9	21	18	3
Nelson Nancy	7	30	37	9	28	26	2
Richardson Robert	1	24	25	8	17	10	7
Production							
Bailey Bernd	3	29	32	14	18	9	9
Green George	5	30	35	8	27	18	9
Henderson Helen	5	28	33	13	20	9	11
Jackson John	0	27	27	17	10	0	10
Johnson Jennifer	5	29	34	10	24	19	5
King Karen	2	30	32	13	19	10	9
Lopez Linda	0	29	29	8	21	9	12
Morgan Micheal	2	33	35	15	20	9	11

The vacation entitlements of the employees need to be entered (menu **Edit - Employees**) in order to use the Vacation Overview.

A further condition is that you enter the code letter for the buttons that you use for vacation (menu **Edit - General Settings - Vacation**). Preset is code letter **V** for full day vacation and $\frac{1}{2}$ for half day vacation. To create the special character $\frac{1}{2}$, press the ALT key and type the key sequence 171 on the numeric keypad.

If you use a button for half day vacation, the information in the Vacation Overview is displayed with a decimal.

You can sort a column in ascending or descending order by clicking on the column heading. So, for example, you can display the employees with the highest number of residual leave with a single click.

How to start

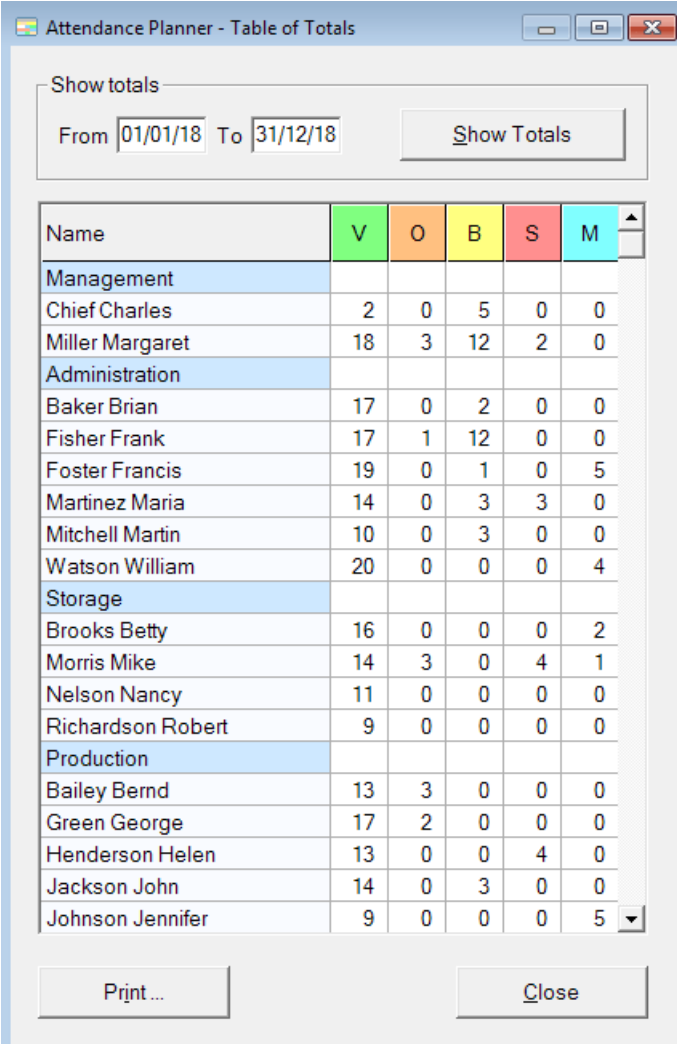
Before you enter the vacation entitlements of the employees in the menu **Edit - Employees** you first have to determine at which date you wish to start entering the days of vacation. There are three options:

- *Start at the beginning of the previous year (time-consuming):* In this case enter the remaining vacation entitlement effective January 1st of the previous year in the column residual leave.
- *Start at the beginning of the current year:* Enter the remaining vacation entitlement effective January 1st of the current year and leave the column with the vacation entitlement of last year empty.
- *Start at the current date:* leave the column residual leave and the column with the vacation entitlement of the previous year empty. In the column with the vacation entitlement of the current year fill in the current remaining vacation entitlement for this year.

You only need to enter the residual leave when setting up the program for the first time. At the beginning of a new year, the program automatically switches one year onward and recalculates the residual leave.

Table of Totals

You can view a summary of all entries for each 'reason for presence/ absence' with the menu option **View - Table of Totals**.



Name	V	O	B	S	M
Management					
Chief Charles	2	0	5	0	0
Miller Margaret	18	3	12	2	0
Administration					
Baker Brian	17	0	2	0	0
Fisher Frank	17	1	12	0	0
Foster Francis	19	0	1	0	5
Martinez Maria	14	0	3	3	0
Mitchell Martin	10	0	3	0	0
Watson William	20	0	0	0	4
Storage					
Brooks Betty	16	0	0	0	2
Morris Mike	14	3	0	4	1
Nelson Nancy	11	0	0	0	0
Richardson Robert	9	0	0	0	0
Production					
Bailey Bernd	13	3	0	0	0
Green George	17	2	0	0	0
Henderson Helen	13	0	0	4	0
Jackson John	14	0	3	0	0
Johnson Jennifer	9	0	0	0	5

Enter a period and select the button **Show Totals**.

At the end of the table, the grand totals are displayed.

Logbook

Each entry that is made is logged in a logbook. With the menu option **View - Logbook** you can view the logbook entries.

Date	Time	Name	Entry	Period	Comment
02/07/18	07:45	Fisher Frank	Vacation	27/07/18 - 31/07/18	
02/07/18	08:06	Foster Francis	Business Trip	02/07/18 - 02/07/18	
02/07/18	08:06	Foster Francis	Miscellaneous	13/07/18 - 17/07/18	
02/07/18	08:06	Fisher Frank	Business Trip	20/07/18 - 20/07/18	
02/07/18	08:11	Martinez Maria	Business Trip	20/07/18 - 22/07/18	
02/07/18	08:11	Fisher Frank	Overtime	20/07/18 - 20/07/18	
02/07/18	14:12	Watson William	Miscellaneous	27/07/18 - 31/07/18	
03/07/18	08:56	Watson William	Vacation	01/07/18 - 09/07/18	
03/07/18	08:57	Brooks Betty	Vacation	20/07/18 - 24/07/18	
03/07/18	08:57	Morris Mike	Sick Leave	02/07/18 - 03/07/18	
03/07/18	08:57	Morris Mike	Miscellaneous	09/07/18 - 09/07/18	
03/07/18	08:57	Morris Mike	Overtime	13/07/18 - 16/07/18	
03/07/18	09:13	Richardson Robert	Vacation	27/07/18 - 28/07/18	
03/07/18	11:57	Bailey Bernd	Overtime	15/07/18 - 17/07/18	
03/07/18	13:09	Green George	Vacation	01/07/18 - 01/07/18	
03/07/18	14:02	Johnson Jennifer	Miscellaneous	01/07/18 - 03/07/18	
03/07/18	15:58	Lopez Linda	Miscellaneous	15/07/18 - 17/07/18	
03/07/18	15:58	King Karen	Vacation	23/07/18 - 27/07/18	

You can indicate a time period, for which you would like to display the logbook and you can select a name whose entries you would like to display.

You can sort the displayed entries by clicking on the desired column heading. With a double click on any cell, only those entries are displayed, which have the same content as the clicked cell. You can repeat this function.

Data Folder

Change data folder

You can choose the folder in which all data of the Attendance Planner is stored by selecting the menu option ***File - Change Data Folder***. If you change the data folder, you move the data into the selected folder.

Export data

You can export the data folder with the menu option ***File - Export Data*** into a backup file.

Save your data regularly on an external back-up. If your hard disk fails, all your data will be irretrievable.

You can export currently displayed data to a CSV file by pressing the key ***F12***. In this way you can continue editing the data using another program like Excel. An export to a CSV file is available for the Main Form, the Annual Overview, the Vacation Overview, the Table of Totals and the Logbook.

Import data

Using the menu option ***File - Import Data*** you can import a backup file saved under ***File - Export Data***. All current existing data is overwritten by the data stored in the backup file.

Recover data

The program automatically sets regular backup periods e.g. the first program start-up of the day or before changing 'reasons for presence/ absence' or changing employee data.

The menu option ***File - Recover Data*** enables you to recover all data to an earlier backup point. All changes made since then, will be undone.

Before the data folder is recovered a new backup point is set, so you can undo the recovery.

Questions and Problems

Send an e-mail to support@attendance-planner.com. Further information is available on www.attendance-planner.com.

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