Human Resources Module

Daily Attendance

Path: Human Resources/Data Entry/Daily Attendance

Daily Attendance routine provides quick data entry of employee attendance events being tracked in each appointment, such as prior balances, annual accruals, days taken, days donated/taken from attendance pool, etc. Attendance notes can also be recorded. The Attendance Reporting Menu provides access to various reports allowing you to print employee attendance record information.

The Daily Attendance listing displays all employees in buildings for which you have permissions, along with their positions, employee IDs, and attendance balances in each of the main banks. Use this window to find the appropriate employee record.

Adding an Attendance Entry

- Choose the appropriate **Fiscal Year** that you are tracking attendance for. As you change the fiscal year, the attendance balances change accordingly for the employees in the list.
- Highlight the appropriate **Employee** and **Position Record**.
    - **NOTE:** Each position can have its own attendance bank and attendance detail. Be sure to record attendance events against the correct position.
- Enter **Update** mode. The Attendance Entry window displays.
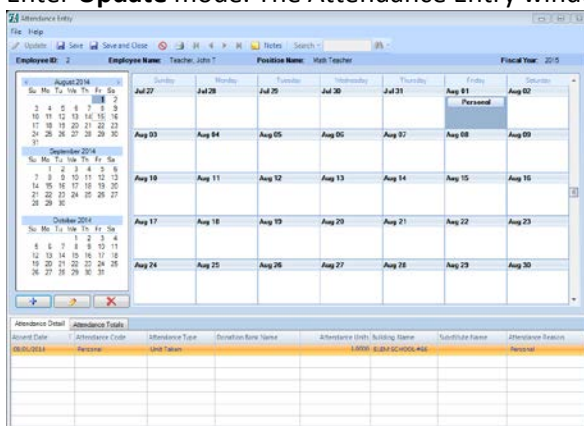
- The Attendance Entry window is divided into 3 sections –
    - Attendance Calendar, Attendance Detail, and Attendance Totals
- The maintenance toolbar displays under the calendar .
- Highlight the correct **Attendance Event Date** in the calendar and click add in the maintenance toolbar.

OR

- Double-click on a specific date in the calendar.
- The Add Absent window displays.
    - Enter the following attendance information into the fields

- **Employee ID/Name** - NONMODIFIABLE – The employee ID number and name are defaulted by the system upon selection of an employee and cannot be modified.
- **Building** (REQUIRED) - Enter the building in which the employee is scheduled to work. The default value is the employee's primary building assignment for the position appointment.
- **Attendance Code** – Choose appropriate attendance code.
- **Attendance Type** - Select the attendance type.
  - **Donation** – Use this type if you are recording sick time units being donated to a specific pre-defined bargaining unit attendance bank pool.
  - **Earned Accrual** – Use this type if you are recording an attendance accrual.
  - **Leave Request** – Use this type if you are requesting approval for a leave of absence.
  - **Pay Out** – Use this type if you are paying an employee for a day instead of the employee actually being absent for the day.
  - **Prior Balance** – Use this type if you are recording a carry forward attendance balance from one year to the next.
  - **Taken from Donation** – Use this type if you are recording units being taken from a specified pre-defined bargaining unit attendance bank pool.
  - **Unit Taken** – Use this type if you are recording an attendance event taken.
- **Donation Bank** - This field is only enabled if the Attendance Type selected is either Donation or Taken from Donation - Choose correct donation.
- **Substitute Name** - If a substitute is filling in for the employee, enter the number that identifies the substitute.
- **Reason** - The entry in this field defaults based on the Attendance Type selected.
  - You may change the default Reason text and type in a free-form description as needed.
- **Absent Type** - This field is only available if the Attendance Type selected is Leave Request, Taken from Donation, or Unit Taken. Choose the absent type of Full Day or Partial Day. When choosing Partial Day, enter the number of days.
- **Start Date/ End Date** - Enter the Beginning and Ending Dates of the attendance event. nVision flags the corresponding days of the week for the attendance event.
  - Based on the attendance date(s) indicated and the Unit Type defined for the attendance code, the system creates the appropriate number of detail attendance records.
  - ○ Click **Add** [Add] .
  - ○ Click **Save** in Attendance Entry.

The calendar reflects any attendance events by showing the event under the date. When you hover your mouse over the attendance event, an informational tooltip is provided which shows the attendance type, building, substitute name, attendance units, and reason.
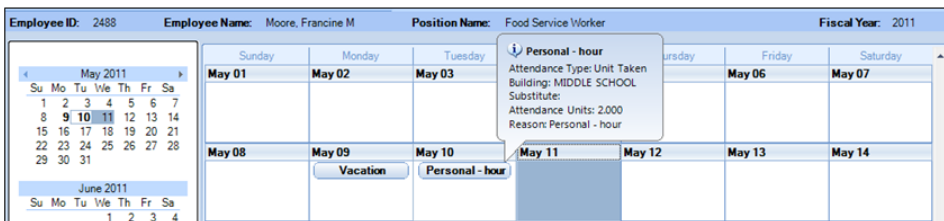
Attendance Detail Tab

The Attendance Detail browser displays the following information: Absent Date, Attendance Code, Attendance Type, Donation Bank Name, Attendance Units, Building Name, Substitute Name, and Attendance Reason. The default sort order of attendance records is in order of most recent to oldest attendance date within the fiscal year selected.
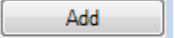
Attendance Totals Tab

Displays the employee's attendance bank, which shows a summary of the various attendance events recorded during the selected fiscal year and the amount available in each bank.

Attendance Code	Prior Balance	Earned Accrual	Taken	Taken From Bank	Donated	Balance
Personal	0.0000	0.0000	1.0000	0.0000	0.0000	-1.0000

Updating or Deleting Attendance Entry

- In Daily Attendance, choose the appropriate **Fiscal Year** that you are tracking attendance for.
- In the listing, highlight the appropriate **Employee** and position record.
- Enter **Update** mode. The Attendance Entry window displays.
- Highlight the appropriate **Attendance Record** in the Attendance Detail browser.
    - To Update Entry- Click Edit [ ].
        - Update information by typing over the existing entries.
        - Click **Add** [Add].
        - Click **Save** in Attendance Entry.
    - To Delete Entry - Click Delete [✕].
        - Confirm that this is the correct record that you want to delete.

The Attendance calendar and bank are updated to reflect the attendance change.

NOTES

Checking Balances

If the employee has no available days or not enough available days, the system checks the information in Attendance Code Setup. If the Check Attendance Balance field for the attendance code is checked, the system displays the message "Employee does not have enough time available for the selected date range." The user may override the warning message and record the event. If the Check Attendance Balance field for the attendance code is unchecked, the system simply records the event without displaying a warning message.

**Recording Attendance Events for a Series of Days**

If you are recording a series of events on a weekend or that will cross over a weekend, nVision automatically skips the weekend and adds the attendance to the next available weekday. However, you may change the flags to designate the appropriate days of the week.

How Many Records Get Created

nVision creates detail attendance records based on the unit type (Days or Hours) of the attendance code.

- Creates one detail record for an attendance event code that is defined as Hours in Attendance Code Setup.
  Example: If Sick is set up as Hours and you enter 2 sick units taken, one detail record is created with 2 sick units.
- Creates multiple detail records for an attendance event code that is defined as Days in Attendance Code Setup.
  Example: If Vacation is set up as Days and you enter 3 vacation days taken, 3 detail records are created with 1 vacation unit each.

Printing a Calendar Report

- In Attendance Entry - Click Print [🖨] to print a Calendar Report for the employee displayed on the window.
    - Choose Print All to print a calendar of events for all months.
    OR
    - Choose Print Current Month to print the calendar for the current month.
- Choose the default printer or use the drop-down to select another printer.
- Click [Print]. All units taken are reflected on the appropriate calendar day.