Attendance Module

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What is the Attendance Module?

The attendance module allows you to track employees attendance for a week at a time.

How to Locate the Attendance Module:

This module can be found by navigating to "All Options" and selecting "Attendance". This will take you to a search form with filter criteria at the top of the form. You can search for a particular customer, order ID, or branch and can tailor your search further by specifying order statuses/weekend bill/rep information.

Once you've selected your search criteria, it will bring up a list of desired orders.

The search form can also be navigated to from a customer or an order under the "Details" area. Once a search has been performed, a list of orders will appear as expanders in the search results area.

Clicking on an order expands the list to expose a data grid of Assignments to manage attendance items.

Clicking on an order will expand the item to expose a data grid of assignments.

For each assignment there are columns for each day of the week. These columns have check boxes which indicate if the employee is assigned for that day.

To view assignments for that order:

select the '^' icon to the left of the order ID. This will expand the order to show all assignments.
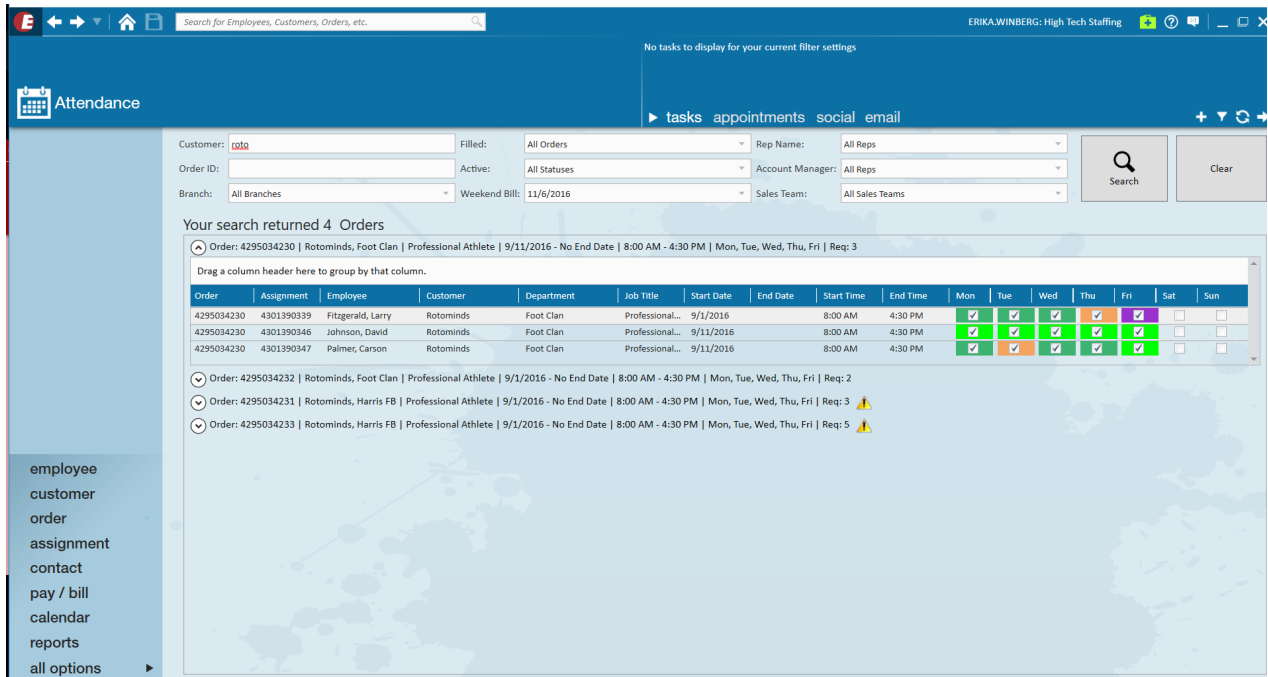

Right clicking on an assignment will expose a context menu of options. This includes options for navigation, creating new order\assignments, logging messages, setting a status, and extending the assignment.
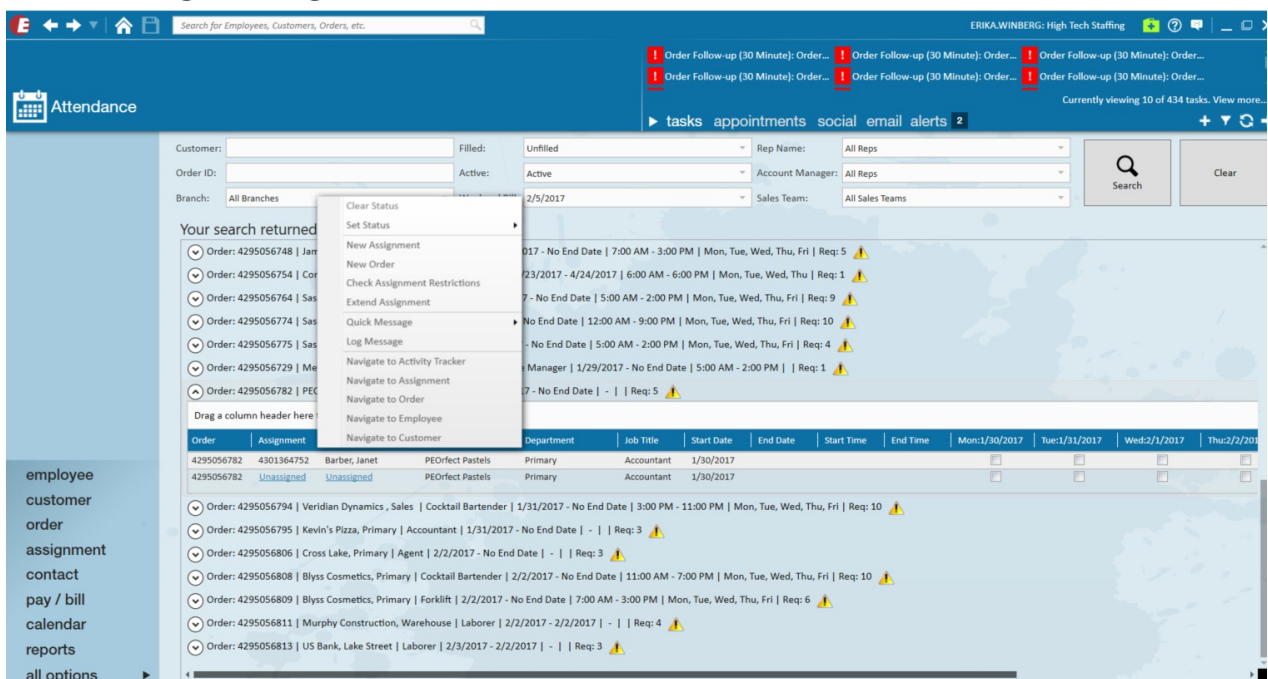
On the order, a warning/error icon will appear on the expander header if validation fails for the order.

For example, if the order is over-filled or under-filled a warning will appear. This won't affect the ability to set statuses. If you hover over the warning icon, you will see what warnings exist for the order in a popup.
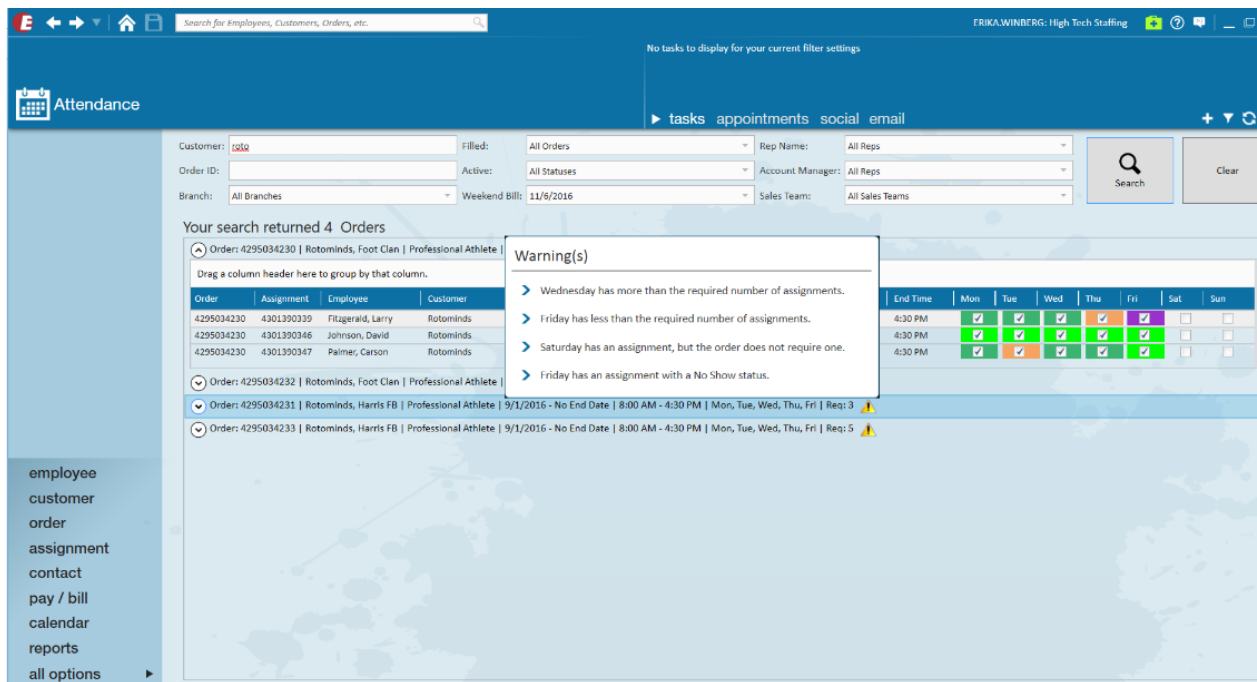

How to Set Statuses:

Statuses can be set by right clicking the corresponding day on the assignment. These statuses are color coded so you can see visually the statuses for that employee's assignment for the week. For example, in the statuses below you can update a specific day to "Active", "Excellent", "No Call No Show", etc. This list is customizable under all options > administration > attendance > color codes.

This will only be enabled if the day is allowed to have a status set:

- The order must have the day scheduled for an assignment
- The assignment must also have the day scheduled
- Each status is color coded (these need be setup in All Options > Admin > Attendance > Color Codes).

Attendance can also be viewed directly on the order under details > attendance:
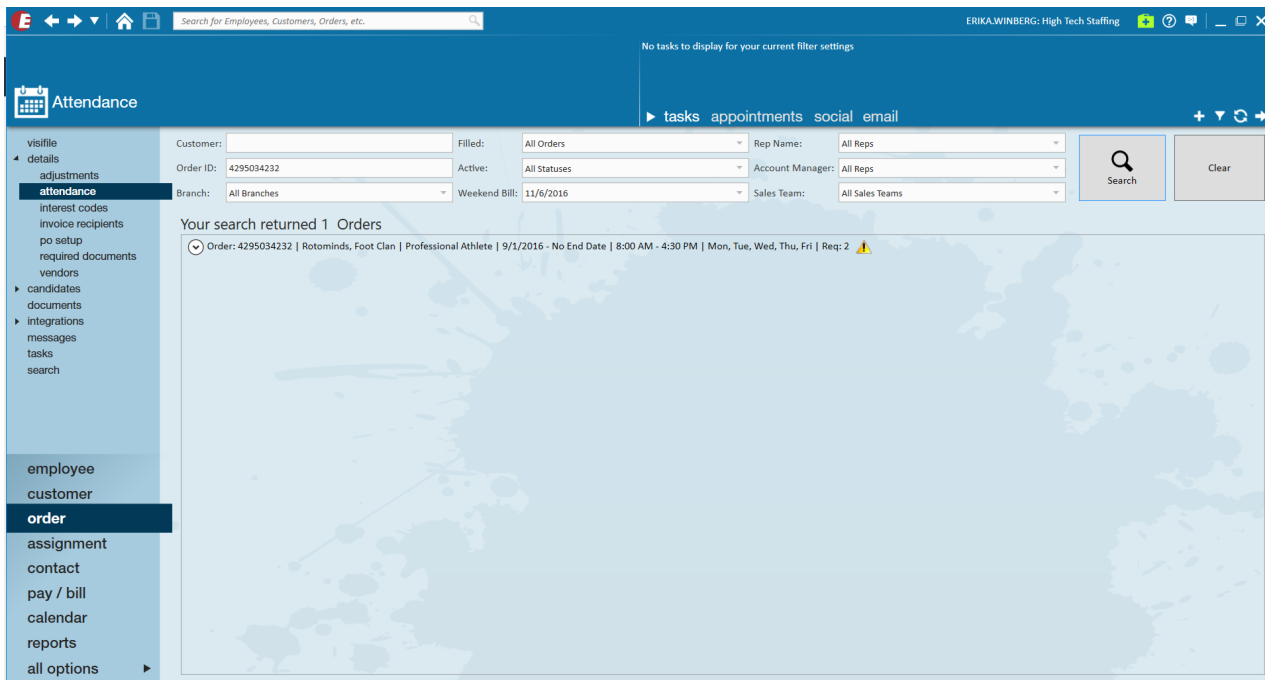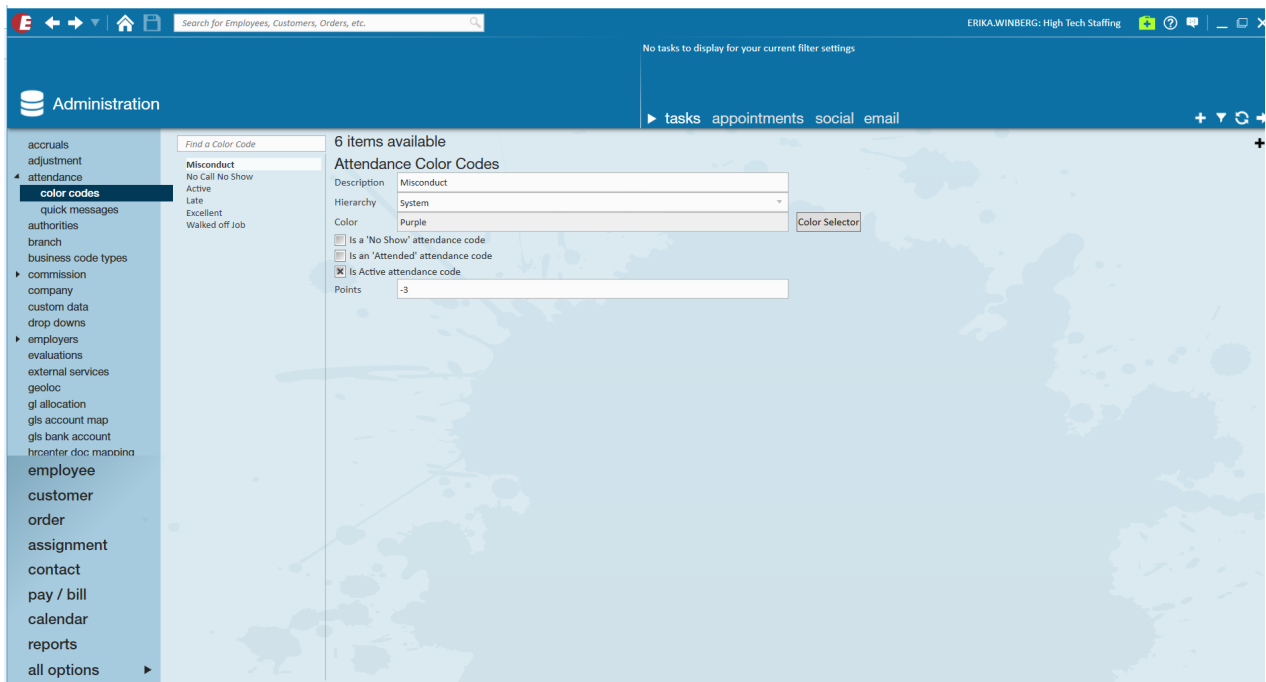
Preview Attendance:

Within the the Customer users may preview attendance as well. Navigate to the customer of choice > details > attendance:
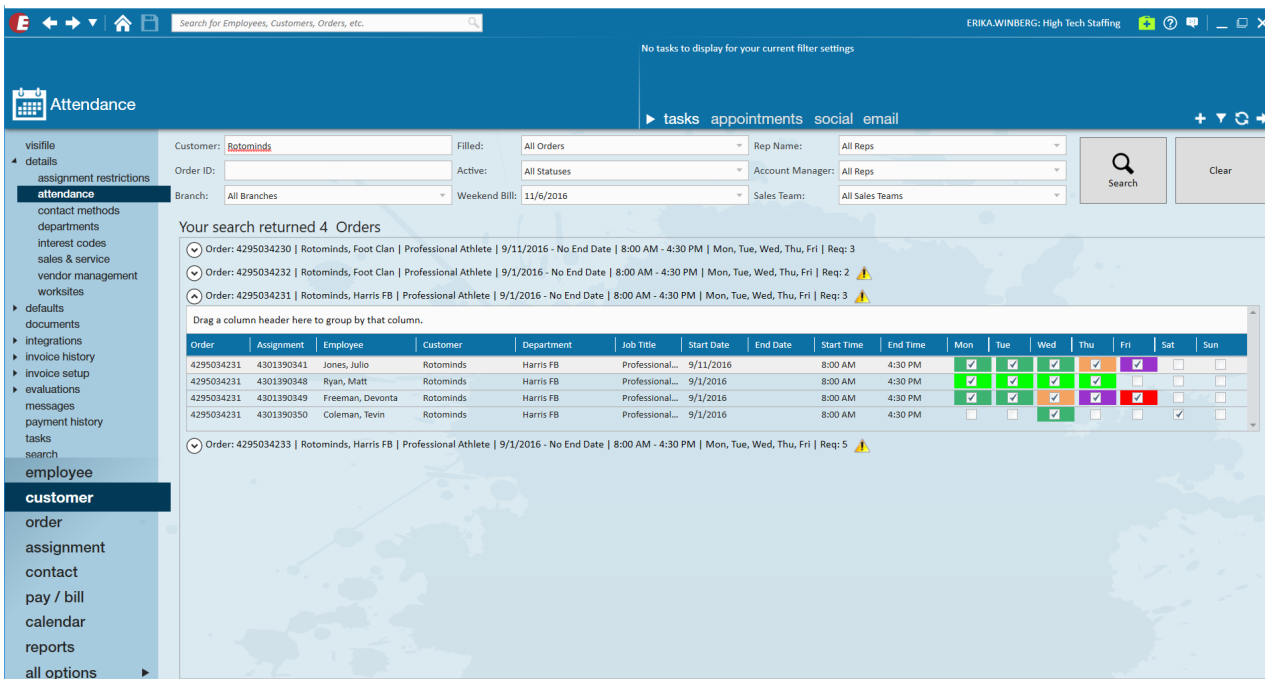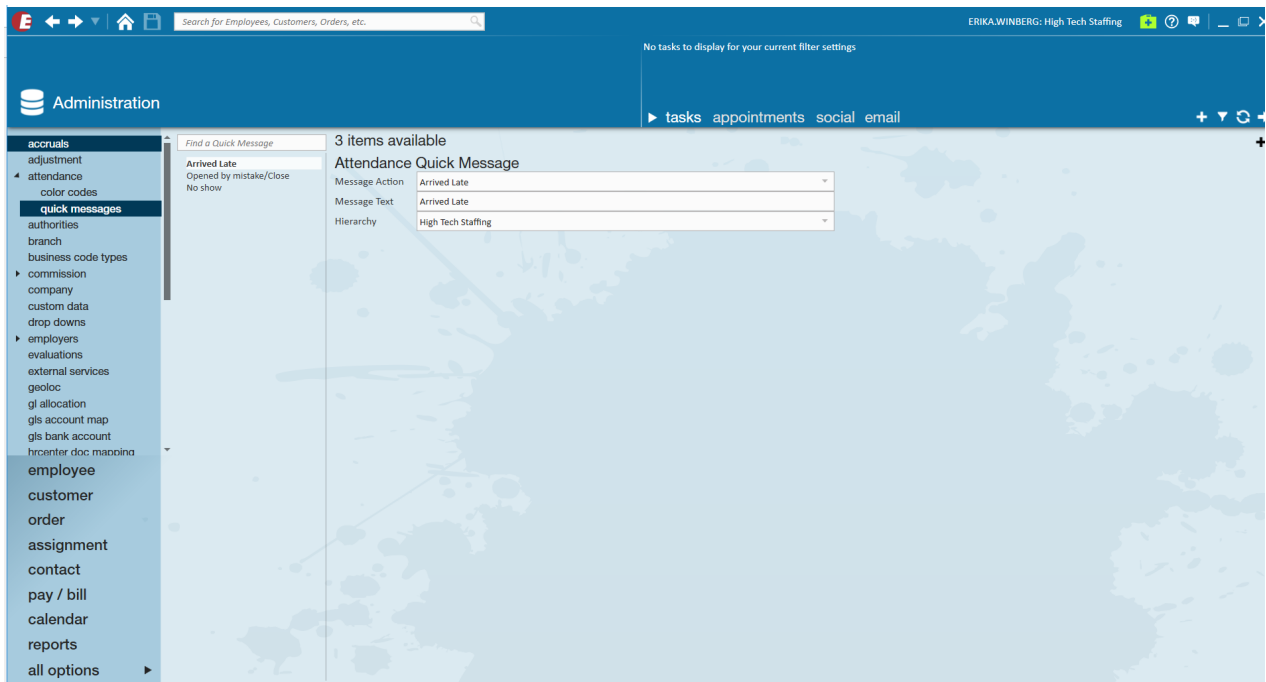

Admin Settings:

Color codes can be set up under all options > administration > color codes. To add a new color code, select the '+' icon in the upper right hand corner.

Quick messages must be setup in All Options > Admin > Attendance > Quick Messages. The message will be logged on the employee, order, and customer/department. These messages can be added by selecting the '+' icon in the upper right hand corner.

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