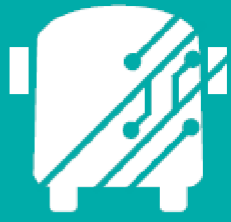


Smarter Transportation.



EDULOG

ATHENA TIME AND ATTENDANCE

Absence Records Training Resource Guide



Absence Records

Training Resource Guide

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Education Logistics, Inc.

3000 Palmer St.

Missoula, Montana 59808

(406) 728-0893

<https://www.edulog.com/>

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ABSENCE RECORDS TRAINING RESOURCE GUIDE

PURPOSE OF THIS GUIDE

The Absence Records Resource Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of creating and approving absences within the software, as well as provide you with specific scenarios you may encounter as you begin to independently navigate the system within the User Stories section of this guide.

ATHENA ABSENCE RECORDS INTRODUCTION

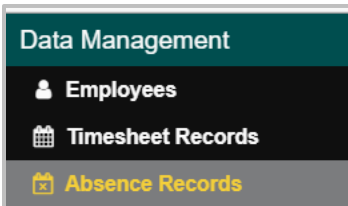
The workflow of creating and approving employee absence records takes place within the Absence Records Module of Athena Time and Attendance. Employees will have the ability to detail the specifics of their work absence, and be able to track the submission and approval history of a submitted record. Supervisors alternatively will have the ability to review employee absence requests, and either approve the request, or message employees directly to have them correct or change the submitted records.

NAVIGATING THE ABSENCE RECORDS MODULE

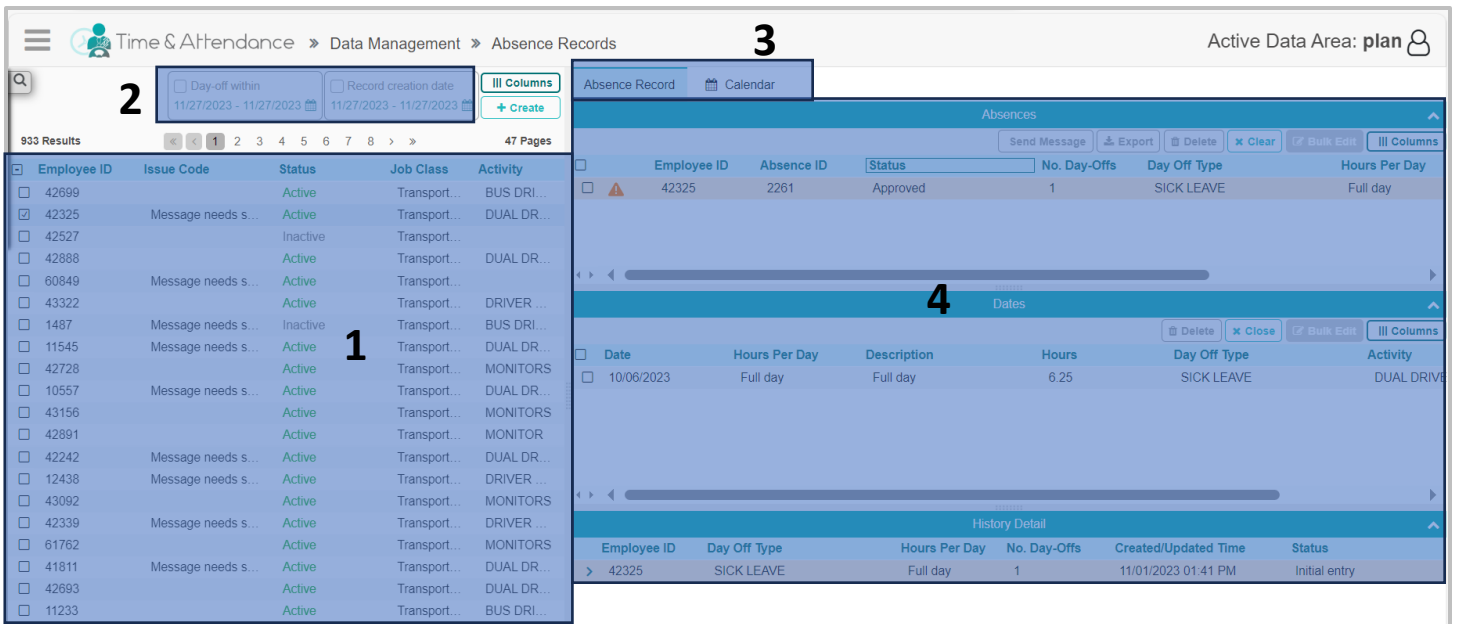
1. Enter the Time and Attendance Application.



2. Navigate to the Absence Records Module under the Data Management section of the menu.



3. **Absence Records—Module Interface:**



(1) Employee List: On the left in the Data Panel is the employee list.

(2) Date Range: The user will have the ability to search within a specific week, pay period, or date range for employee absences.

(3) Absence Tabs: There are two tabs that display in the Workspace Panel: Absence Record and Calendar.

(4) Workspace Panel Cards: There are three cards in the Workspace Panel: Absences, Dates, and History Detail.

4. Data Panel and Employee List:

Employee ID	Issue Code	Status	Job Class	Activity
<input type="checkbox"/> 42699		Active	Transport...	BUS DRI...
<input checked="" type="checkbox"/> 42325	Message needs s...	Active	Transport...	DUAL DR...
<input type="checkbox"/> 42527		Inactive	Transport...	
<input type="checkbox"/> 42888		Active	Transport...	DUAL DR...
<input type="checkbox"/> 60849	Message needs s...	Active	Transport...	
<input type="checkbox"/> 43322		Active	Transport...	DRIVER ...

4.1. Filter for day's off or for records created within a selected pay period by enabling the "Day-off within" or "Record Creation Date" tools. Opening the calendar window, the user will have the ability to search within a specific week, pay period, or date range.

Day-off within
 11/27/2023 - 11/27/2023 📅

Record creation date
 11/27/2023 - 11/27/2023 📅

Record creation date
 12/01/2023 - 12/01/2023 📅

All Columns

Today

This Week

Pay Period

From Date To Date

All Weekdays

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

<

Nov

November 2023

2023

>

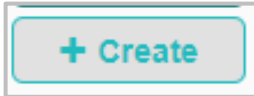
December 2023

	Su	Mo	Tu	We	Th	Fr	Sa
						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						

Code	From	To
NOV	10/16/2023	11/10/2023
Driver Only	11/21	10/23/2023 - 11/03/2023
Dec23	10/30/2023	12/01/2023
Driver Only	12/15	11/06/2023 - 11/24/2023
12 MO	DEC	11/13/2023 - 12/08/2023

4.2. Create an Absence Record:

To create an Absence Record (A-Record) for an employee, the user will select the employee in the data panel, before selecting the “Create” tool.



Following the selection of the “Create” tool the user will be brought to the “Create Absence Record” window where they will outline the employee’s Absence:

Create Absence Record

Day Off Type: SICK LEAVE a Hours Per Day: Full day Description: Full day b

Job Class: Transportation Activity: DUAL DRIVER Date: 11/27/2023 - 11/29/2023

Date	Day Off Type c	Hours Per Day d	Description e	Job Class	Activity
11/27/2023	SICK LEAVE	Full day	Full day	Transportation	DUAL DRIVER
11/28/2023	SICK LEAVE	Full day	Full day	Transportation	DUAL DRIVER
11/29/2023	Leave Without Pay	From-To	08:00 AM - 12:45 PM	Transportation	DUAL DRIVER

Status: Initial entry Comment:

0/140

Cancel
Save

- a.) Job Class and Activity:** Prior to saving an employee’s absence, the user will verify the “Job Class” and “Activity” are correct for the selected employee.
- b.) Date Range:** Select a date or date range for the time the employee will be absent.
- c.) Day Off Type:** Select the “type” of day-off the employee will be claiming: Sick Leave, Leave Without Pay, Vacation, etc.
- d.) Hours Per Day:** Detail whether the absence on that day will be for a “Full Day” or for a partial absence (From-To)—a partial absence is if the employee plans to be gone for a period of time during their work day.
- **Note:** A “Full Day” of work is based on the default working hours that are set for that employee. So if an employee’s is assigned to 7 default working hours then a full day will be considered 7 hours of work, and a half day would be 3 1/2 hours.
- e.) Description:** In the description the user will either detail the employees “Full Day” absence, or in the event of a partial absence, they will detail the time period they will be out for that day.

4.2.1. Following the creation of the employee absence(s), the user can determine the status of the newly created absence:

- **Approved:** If a Supervisor is creating the A-Record on behalf of an employee they can opt to approve the record upon its creation.
- **Initial Entry**
- **Supervisor Review**

The screenshot shows a form with a 'Status' dropdown menu on the left containing 'Approved', 'Initial entry', and 'Supervisor review'. The 'Approved' option is selected. To the right is a 'Comment' text area containing the text 'Created and Approved on 11/27/23 ; MI'. At the bottom right of the form are two buttons: a red 'Cancel' button and a teal 'Save' button. The number '37/140' is visible in the top right corner of the form area.

5. Workspace Panel:

When the user selects an employee in the Data Panel, they will see that employee’s absence record information populate within the Workspace Panel Cards—the cards within the Workspace Panel provide further details concerning the recorded absences for the selected employee.

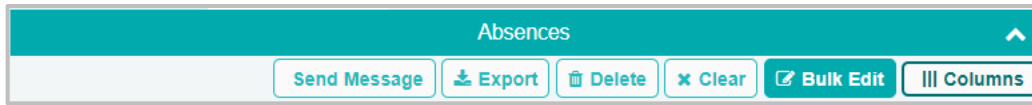
The screenshot displays the Workspace Panel with three main sections:

- Absences:** A table with columns: Employee ID, Absence ID, Status, No. Day-Offs, Day Off Type, Hours Per Day, and Created/Updated. One record is shown for Employee ID 42325, Absence ID 2261, Status Approved, 1 day-off, SICK LEAVE, Full day, and Created/Updated 11/01/2023. Action buttons include Send Message, Export, Delete, Clear, Bulk Edit, and Columns.
- Dates:** A table with columns: Date, Hours Per Day, Description, Hours, Day Off Type, and Activity. One record is shown for Date 10/06/2023, Hours Per Day Full day, Description Full day, Hours 6.25, Day Off Type SICK LEAVE, and Activity DUAL DRIVER. Action buttons include Delete, Close, Bulk Edit, and Columns.
- History Detail:** A table with columns: Employee ID, Absence ID, Status, No. Day-Offs, Day Off Type, Hours Per Day, and Created/Updated. One record is shown for Employee ID 42325, Absence ID 2261, Status Initial entry, 1 day-off, SICK LEAVE, Full day, and Created/Updated 11/01/2023 01:41.

5.1. Absences Card:

The Absences Card will provide all absences recorded for the selected employee. Keep in mind the number of absences you see populate within the card will be dependent on the date range you set within the Data Panel.

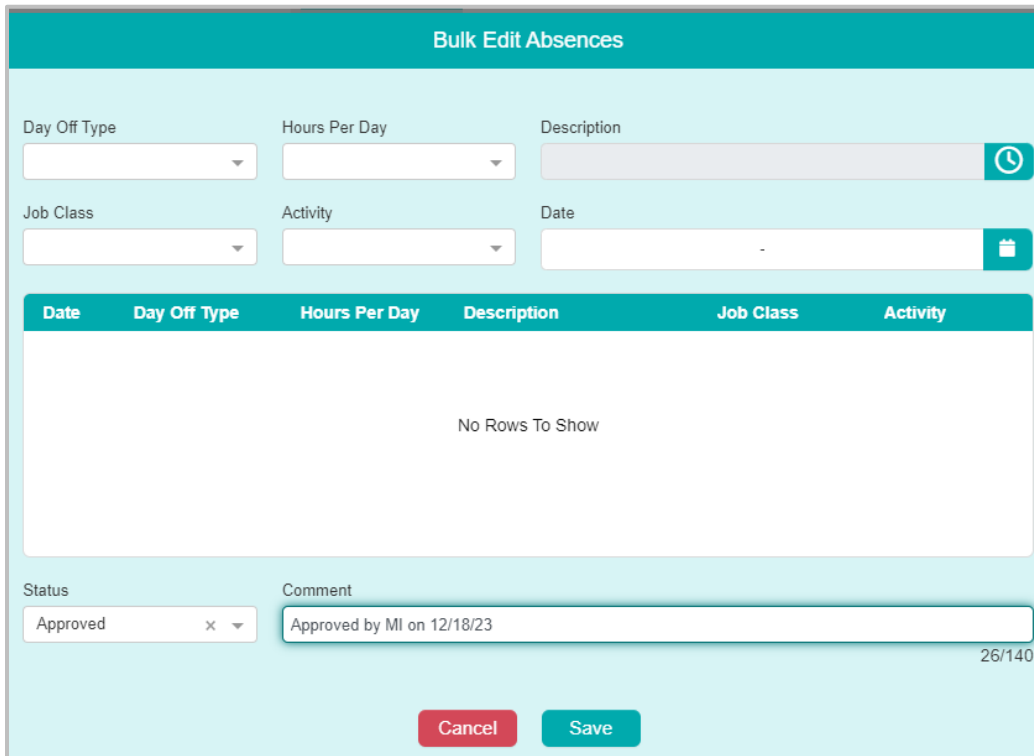
- Selecting an A-Record within the Absences card will populate the “Dates” and “History Detail” cards, providing further information on the selected A-Record.



5.1.1. Bulk Edit Tool:

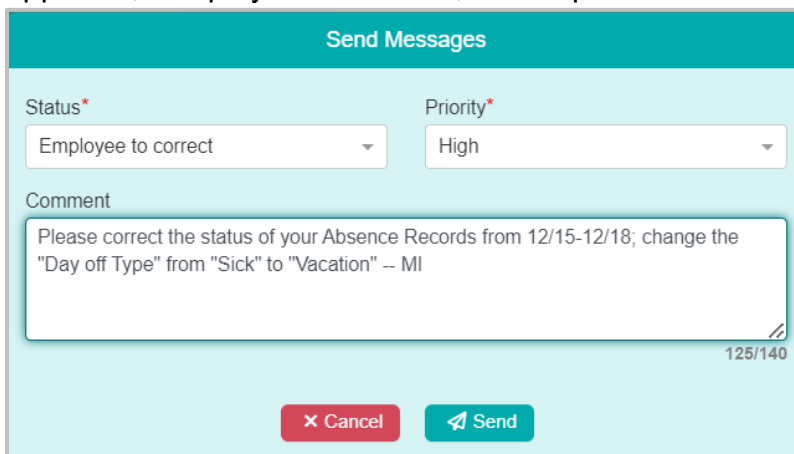
The bulk edit tool can be used to edit a single Absence Record, or multiple at one time. Select the absence(s) to be edited, and within the “Bulk Edit Absences” window the user is able to edit the entirety of the A-Record, or specific fields.

- For example: A supervisor can bulk edit multiple absence records and change their status to approved.



5.1.2. Send Message Tool:

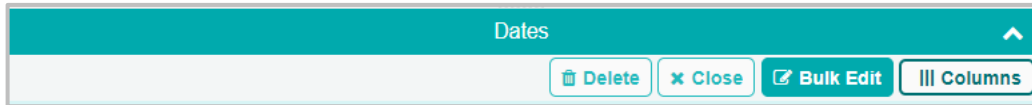
The send message tool allows supervisors to message an employee within Athena to review their Absence Records—The status of the message can be set to “Employee to approve”, “Employee to correct”, or “Request info from employee”.



5.2. Dates Card:

If the selected A-Record encompassing multiple days, the dates card would detail an entry for each day within the larger absence record.

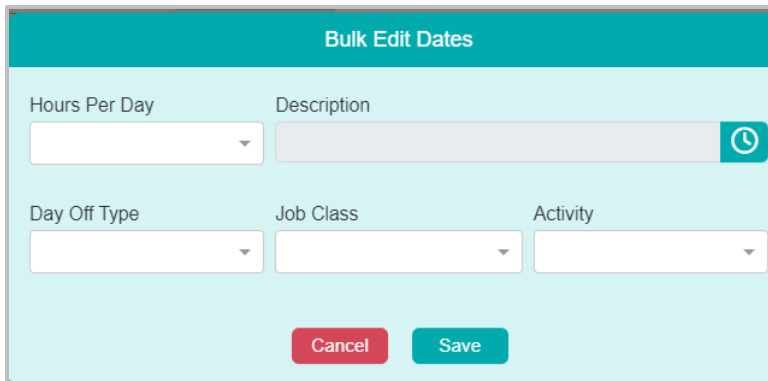
- **For Example:** The A-Record was recorded for 12/3-12/5, the user would see an entry for 12/3, 12/4, and 12/5 within the “Dates” card detailing the “Day Off Type” as well as the “Hours” the employee is absent.



5.2.1. Bulk Edit Tool:

The Bulk Edit tool allows the user to update the following information for the selected A-Record(s):

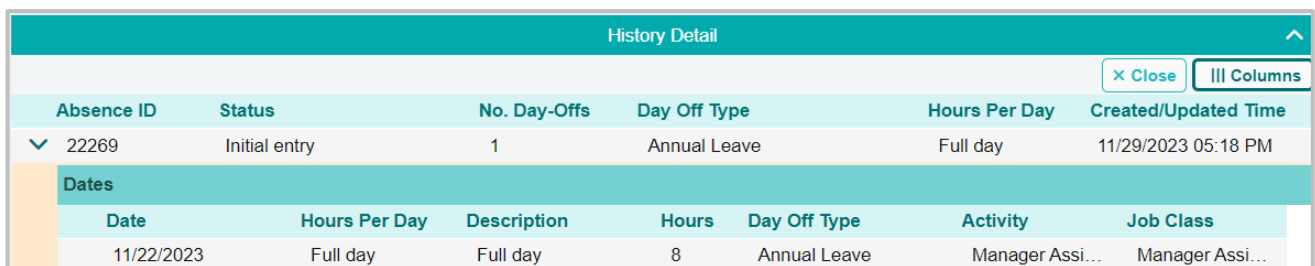
- Hours Per Day
- Day Off Type
- Job Class
- Activity



The image shows the 'Bulk Edit Dates' form. It has a teal header with the text 'Bulk Edit Dates'. Below the header are five input fields: 'Hours Per Day' (a dropdown menu), 'Description' (a text field with a clock icon), 'Day Off Type' (a dropdown menu), 'Job Class' (a dropdown menu), and 'Activity' (a dropdown menu). At the bottom of the form are two buttons: 'Cancel' (red) and 'Save' (teal).

5.3. History Detail Card:

The History Detail Card will show the ‘audit logs’, or changes, that have been made to the selected A-Record.



The image shows the 'History Detail' card. It has a teal header with the text 'History Detail' and an upward arrow. Below the header is a light gray bar containing two buttons: 'Close' (with an 'x' icon) and 'Columns' (with a list icon). Below this is a table with the following columns: 'Absence ID', 'Status', 'No. Day-Offs', 'Day Off Type', 'Hours Per Day', and 'Created/Updated Time'. The first row of data shows: Absence ID 22269, Status Initial entry, No. Day-Offs 1, Day Off Type Annual Leave, Hours Per Day Full day, and Created/Updated Time 11/29/2023 05:18 PM. Below this table is a sub-section titled 'Dates' with a teal header. This sub-section contains a table with the following columns: 'Date', 'Hours Per Day', 'Description', 'Hours', 'Day Off Type', 'Activity', and 'Job Class'. The first row of data in this sub-table shows: Date 11/22/2023, Hours Per Day Full day, Description Full day, Hours 8, Day Off Type Annual Leave, Activity Manager Assi..., and Job Class Manager Assi...

5.4. Audit Logs:

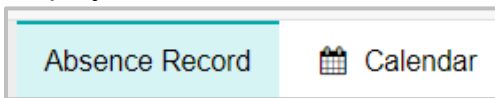
Users are able to track any changes made within the A-Records module within the Created/Updated By columns of the Workspace Panel cards.

Absences					
<input type="button" value="Send Message"/> <input type="button" value="Delete"/> <input type="button" value="Clear"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Export"/> <input type="button" value="Columns"/>					
<input type="checkbox"/>	Absence ID	Status	Created/Updated ...	Created/Updated Time	
<input type="checkbox"/>	22269	Approved	lola.anthony@ucp...	12/05/2023 11:23 AM	
Dates					
History Detail					
<input type="button" value="Close"/> <input type="button" value="Columns"/>					
<input type="checkbox"/>	Absence ID	Status	Created/Updated ...	Created/Updated Time	No.
<input type="checkbox"/>	22269	Initial entry	lola.anthony@ucp...	11/29/2023 05:18 PM	1

6. Absence Record Tabs:

Within the Workspace Panel the user will see two tabs—"Absence Records" and "Calendar".

- The "Absence Record" tab will be the default view found within the Workspace Panel—within this tab the user will find cards providing additional information concerning a selected employee's absence.

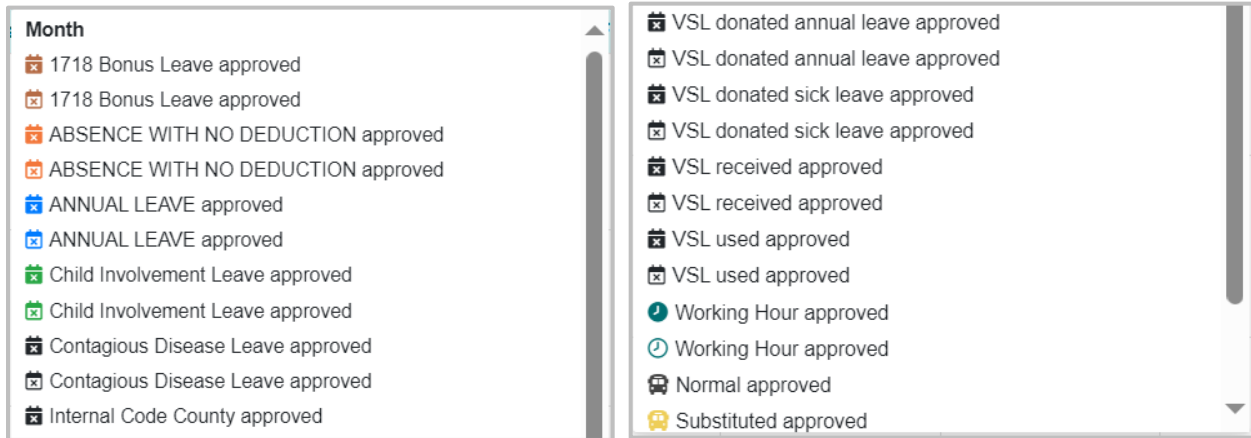


The "Calendar" tab will display the selected employee's absence(s) on a calendar for the user to review.

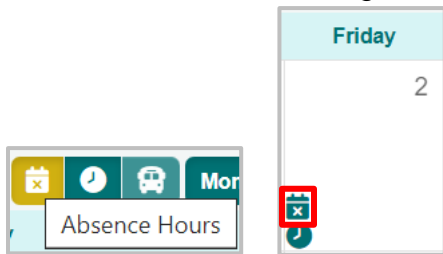
The screenshot displays the "Calendar" tab interface. At the top, there are navigation arrows and the text "October 2023". Below this is a calendar grid with days of the week and dates. A red box labeled 'a' highlights an information icon, 'b' highlights the date '5' (Thursday), 'c' highlights a calendar icon, 'd' highlights a calendar card on Friday, and 'e' highlights a "Month" button. To the right of the calendar is a "Detail" panel, with a red box 'f' highlighting the "Detail" header. The detail panel contains the following information:

- Employee ID: 42325
- Absence ID: 2261
- Name: Abbey Barefoot
- Date: 10/06/2023
- Day Off Type: SICK LEAVE
- Hours Per Day: Full day
- Status: Approved
- Created/Updated Time: 11/01/2023 03:07 PM
- Comment: (empty)

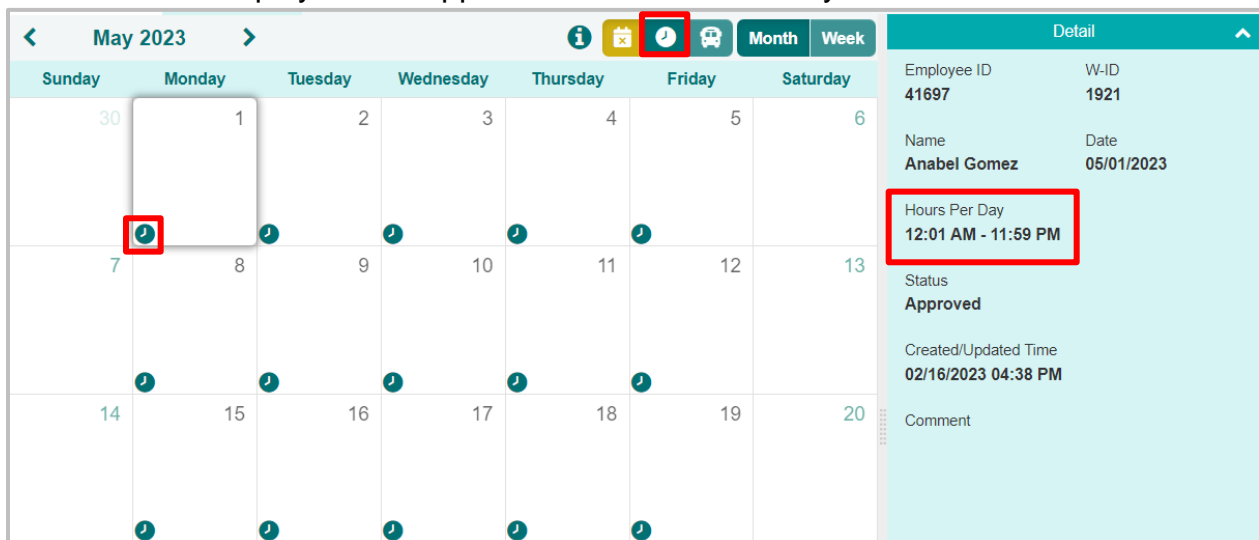
a.) **Information Icon:** The information icon provides a drop-down list of the different symbols a user may come across when navigating the calendar tab.



b.) **Absence Hours:** The absence hours layer is the default calendar display, and will highlight all absences recorded during the displayed month.



c.) **Working Hours:** The working hours layer allows the user to view the dates the selected employee is designated to work. Selecting day will populate the "Detail" card and will display the hours that employee was approved to work for that day.



d.) **Month vs Week:** The user can change the display of the calendar from a monthly view to a weekly calendar display.

e.) **Detail Card:** Selecting an absence within the calendar will populate the “Details” card, and will provide details specific to the selected absence.

ATHENA USER STORIES

The User Stories section of this guide will offer you scenarios that are applicable to some of the workflows you might encounter in your day-to-day tasks within Athena. Some scenarios that will be discussed include:

- [Search for Absence Records to be Approved by a Supervisor](#)
- [Create an Absence Record](#)

1. [Search for Absence Records to be Approved by a Supervisor](#)

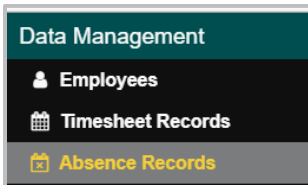
You would like to check if there are any absence requests that you have not yet approved. To search for absence records needing to be approved, the user will use the search filters within the Absence Records Module.

Here’s How:

1. Enter the Time and Attendance Application.

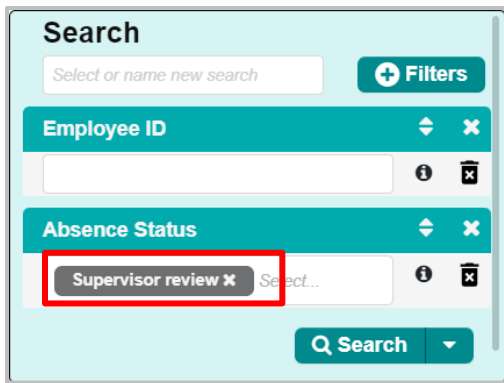


2. Navigate to the Absence Records Module under the Data Management section of the menu.

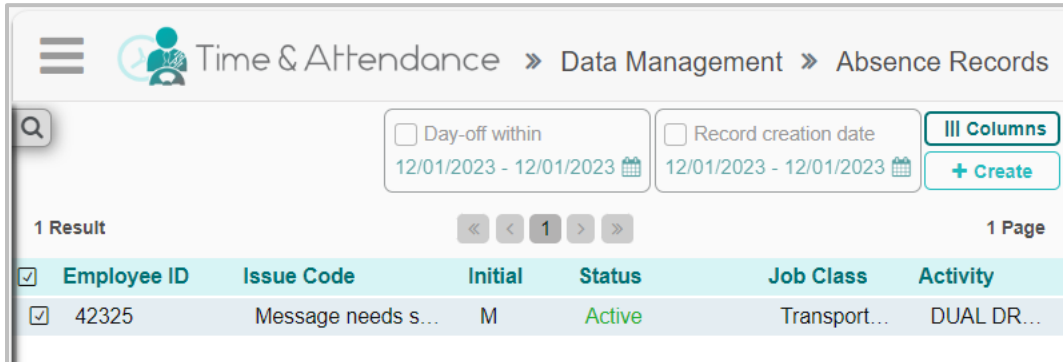


3. **Search Bar:**

In the search bar, the user will add the “Absence Status” filter, and select “Supervisor Review”—this will catch any A-Records that are waiting for approval from a supervisor.

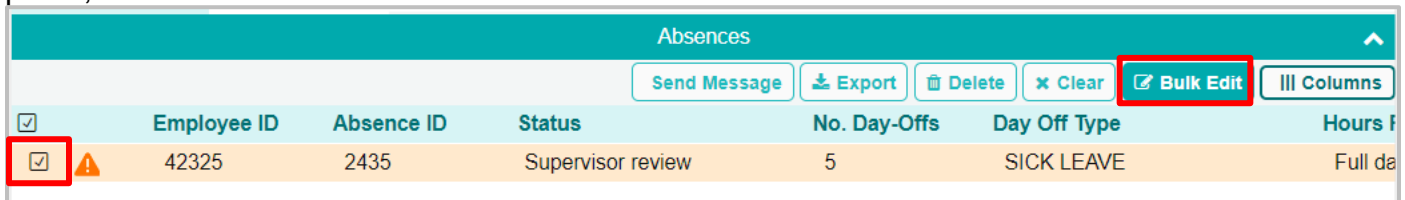


4. Selecting search will populate the results in the Data Panel:



5. Approve A-Record:

To approve the A-Record for the selected employee, the user will select the record in the data panel, then select the records checkbox in the “Absences” card.



Select the “Bulk Edit” tool, and within the “Bulk Edit Absences” window the user will set the status to “Approved”.

Bulk Edit Absences

Day Off Type: Hours Per Day: Description:

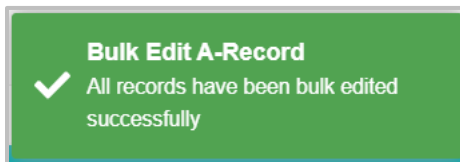
Job Class: Activity: Date:

Date	Day Off Type	Hours Per Day	Description	Job Class	Activity
No Rows To Show					

Status: Comment:

/140

The user will see the following notification upon saving the changes made in the “Bulk Edit Absences” window:



6. The user will find the A-Records status changed within the “Absences” card:

Absences						
	Employee ID	Absence ID	Status	No. Day-Offs	Day Off Type	Hours I
<input checked="" type="checkbox"/>	42325	2435	Approved	5	SICK LEAVE	Full da

2. Create an Absence Record

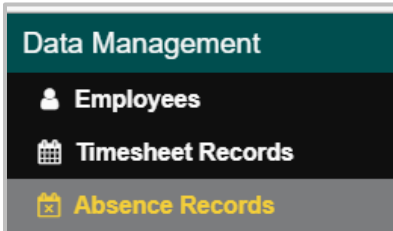
One of your drivers called out sick for the remainder of the work week, and does not have the ability to submit an absence request. Within the Absence Records Module, you will submit an A-Record for your employee, as well as approve the absence.

Here’s How:

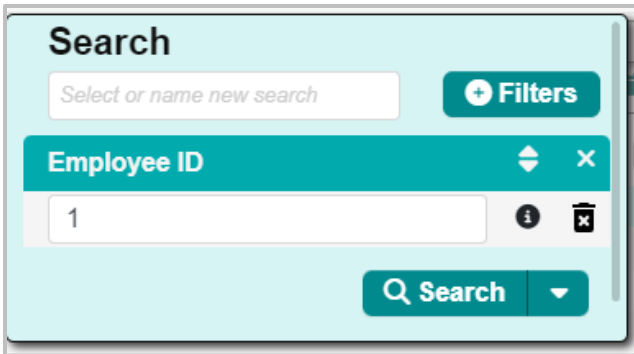
1. Enter the Time and Attendance Application.



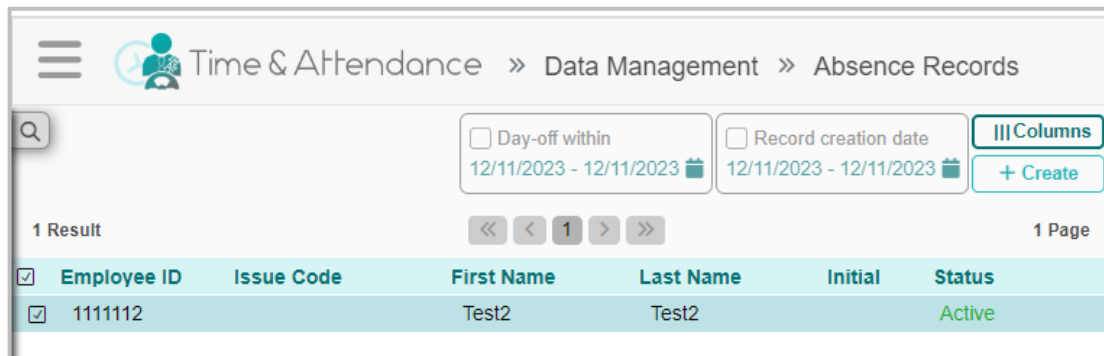
2. Navigate to the Absence Records Module under the Data Management section of the menu.



3. Within the search bar, query by the employee's ID—select search when ready.

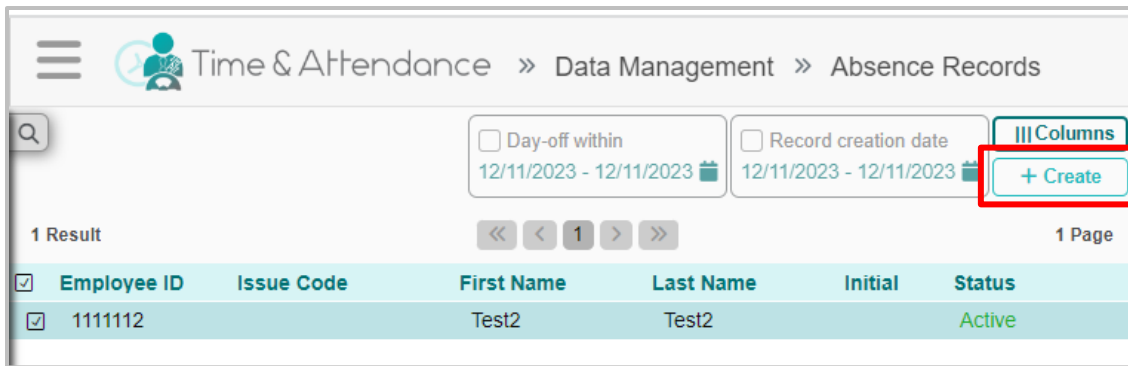


- 3.1. The user will find the result of their search displayed in the Data Panel—select the user whom will need the created absence.



4. Following the selection of the user in the Data Panel, select the "Create" tool located in the upper right of the Data Panel.





4.1. Create Absence Record Window:

After selecting “Create” the user will be brought to the “Create Absence Record” window, where they will fill out the appropriate information for the driver’s absence.

Date	Day Off Type	Hours Per Day	Description	Job Class	Activity
12/12/2023	Sick	Full day	Full day	Default Job ...	Default Activity
12/13/2023	Sick	Full day	Full day	Default Job ...	Default Activity
12/14/2023	Sick	Full day	Full day	Default Job ...	Default Activity
12/15/2023	Sick	Full day	Full day	Default Job ...	Default Activity

- a.) Set the “Day Off Type” and the “Hours Per Day”.
- b.) Verify the “Job Class” and “Activity” are correct.
- c.) Select the “Date” range the employee with be absent.
- d.) Set the “Status” to “Approved”.

- Once saved, the user will see the new absence record populate within the “Absence” card of the Workspace Panel.

Absence Record		Calendar				
Absences						
<input type="button" value="Send Message"/> <input type="button" value="Delete"/> <input type="button" value="X Clear"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Export"/> <input type="button" value="Columns"/>						
<input checked="" type="checkbox"/>	Employee ID	Name	Absence ID	Status	No. Day-Offs	Day Off Type
<input checked="" type="checkbox"/>	1111112	Test2 Test2	3	Approved	4	Sick

- 5.1. Selecting the record in the “Absences” card, will populate the “Dates” card, where the user is able to review the entirety of the A-Record, broken down by individual days.

Absence Record		Calendar				
Absences						
<input type="button" value="Send Message"/> <input type="button" value="Delete"/> <input type="button" value="X Clear"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Export"/> <input type="button" value="Columns"/>						
<input checked="" type="checkbox"/>	Employee ID	Name	Absence ID	Status	No. Day-Offs	Day Off Type
<input checked="" type="checkbox"/>	1111112	Test2 Test2	3	Approved	4	Sick

Dates					
<input type="button" value="Delete"/> <input type="button" value="X Close"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Columns"/>					
<input type="checkbox"/>	Date	Hours Per Day	Description	Hours	Day Off Type
<input type="checkbox"/>	12/12/2023	Full day	Full day	8	Sick
<input type="checkbox"/>	12/13/2023	Full day	Full day	8	Sick
<input type="checkbox"/>	12/14/2023	Full day	Full day	8	Sick
<input type="checkbox"/>	12/15/2023	Full day	Full day	8	Sick

History Detail					
<input type="button" value="X Close"/> <input type="button" value="Columns"/>					
Employee ID	Name	Absence ID	Status	No. Day-Offs	Day Off Type
No Data					