

# Attendance Planner – First Steps

The step by step instructions for setting up the Network Version of the program to meet the requirements of your company are described below.

It is at first only necessary to install the Attendance Planner on a single PC. The installation on other PCs can follow later.

## Administrators

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Enter the employees that will have full access to all the program functions under *Edit - Administrators*.

## General Settings

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Call up the menu point *Edit - General Settings*. Work through each of the settings systematically.

## Employees

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Enter the data of your employees under *Edit - Employees*. Should you have many employees it is possible to import the data from a CSV-File. You can download a tool to assist you in this regard on the website [www.attendance-planner.com](http://www.attendance-planner.com).

If you have decided that employees are entitled to enter information, it is necessary to enter the Windows User Names for the employees. This field then needs to be completed even for employees who do not have a Windows User Name. In this case you can enter the name and surname of the employee in the field.

Should your employees not be authorized to make entries or they do not have a Windows User Name, you can select the option *Employees do not have Windows User Names* in the menu option *Edit - General Settings - Windows User Name*. If you select this option the column Windows User Name is no longer displayed and this field does not need to be completed.

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* in the manual.

## Reasons for Presence/ Absence

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Define the reasons for presence and absence under *Edit - Reasons for Presence/ Absence*.

If your employees are entitled to make entries for themselves then you can use two buttons (*Vacation Planned* and *Vacation Approved*) for the vacation planning. Using *Vacation Planned* employees can apply for vacation and this can be approved by Administrators or Privileged Users using *Vacation Approved*.

## **Weekends**

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The days that need to be identified as weekends in the Attendance Planner can be entered under ***Edit - Weekends***.

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

## **Holidays**

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The holidays of your region can be defined using ***Edit - Holidays***.

## **Other non-business days**

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Designate further work free days, for example annual shutdown (right-click the mouse whilst pressing the SHIFT key on the desired day in the heading).