

Availability Perspective:

Availability and Absences:

Purpose: Use availability perspective to track and get an overview of employee availability and absences.

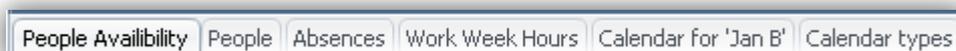
Perspective: "Availability"

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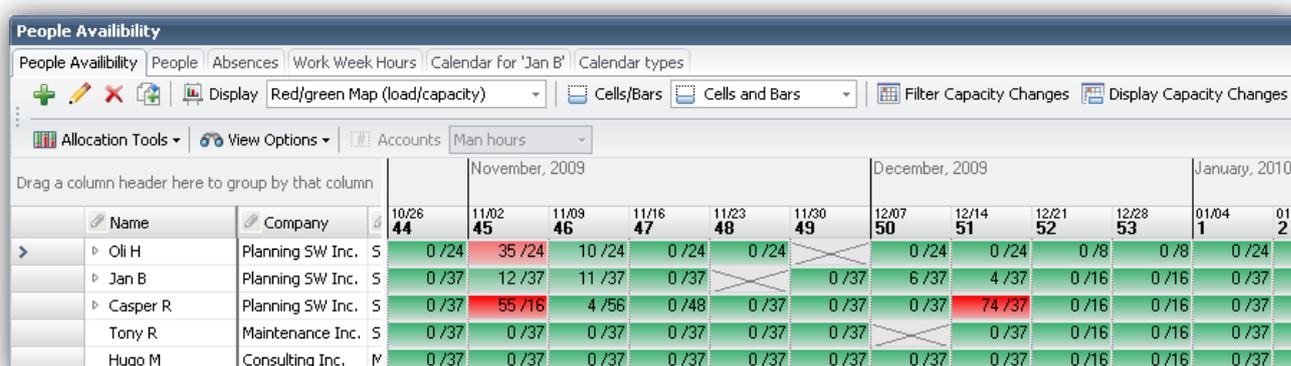
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We will explore each tab of the Availability Perspective and discover how to manage and get an overview of availability and absences.

Tabs:



Perspective:



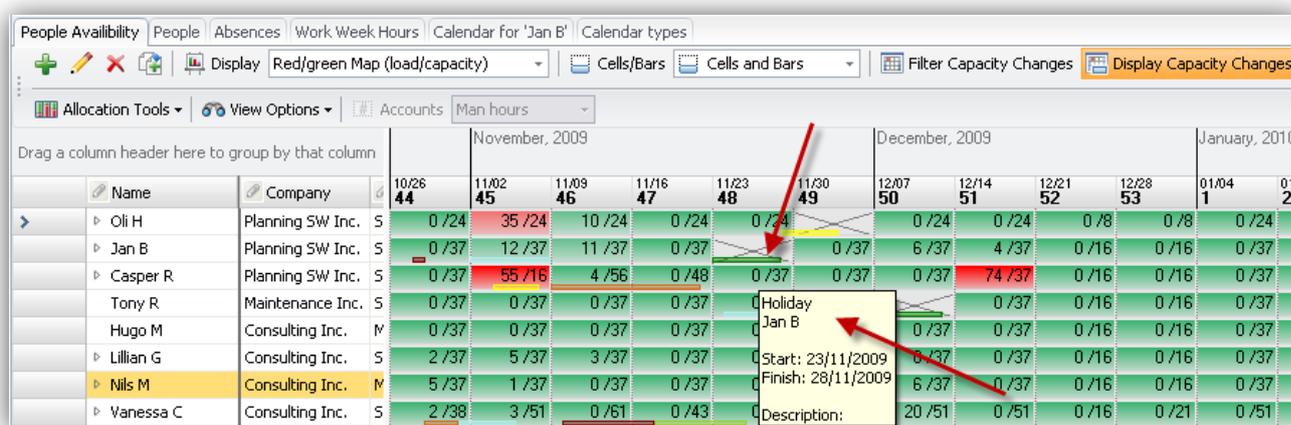
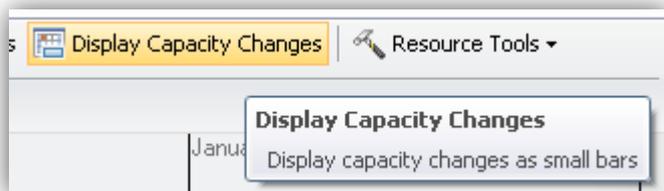
1.1 People Availability Tab

This is a Resource Gantt Chart which shows every person and their capacity. The red/green chart is a Gantt chart, indicating the person's assigned hours (the first number) versus their available hours (the second

number). For instance, you can see Casper is quite overbooked, working 55 hours in a 16 hour available period, and thus is a bright red. Oli, also in Week 45 is only slightly overbooked, working 35 hours in a 24 hour week and is thus, a lighter red color.

The crossed out weeks indicate weeks that the person is unavailable to work.

If you select Display Capacity Changes the chart will change to show you when people are available or unavailable and why:



In the above screenshot, you can see that a tooltip has popped up, showing us that the green bar on Week 48 indicates that Jan has holiday booked for that time. Appropriately, the week is crossed out. Other colored bars can be seen, red and orange and yellow. Those will be discussed in the Absences tab section.

1.2 Filtering Absences:

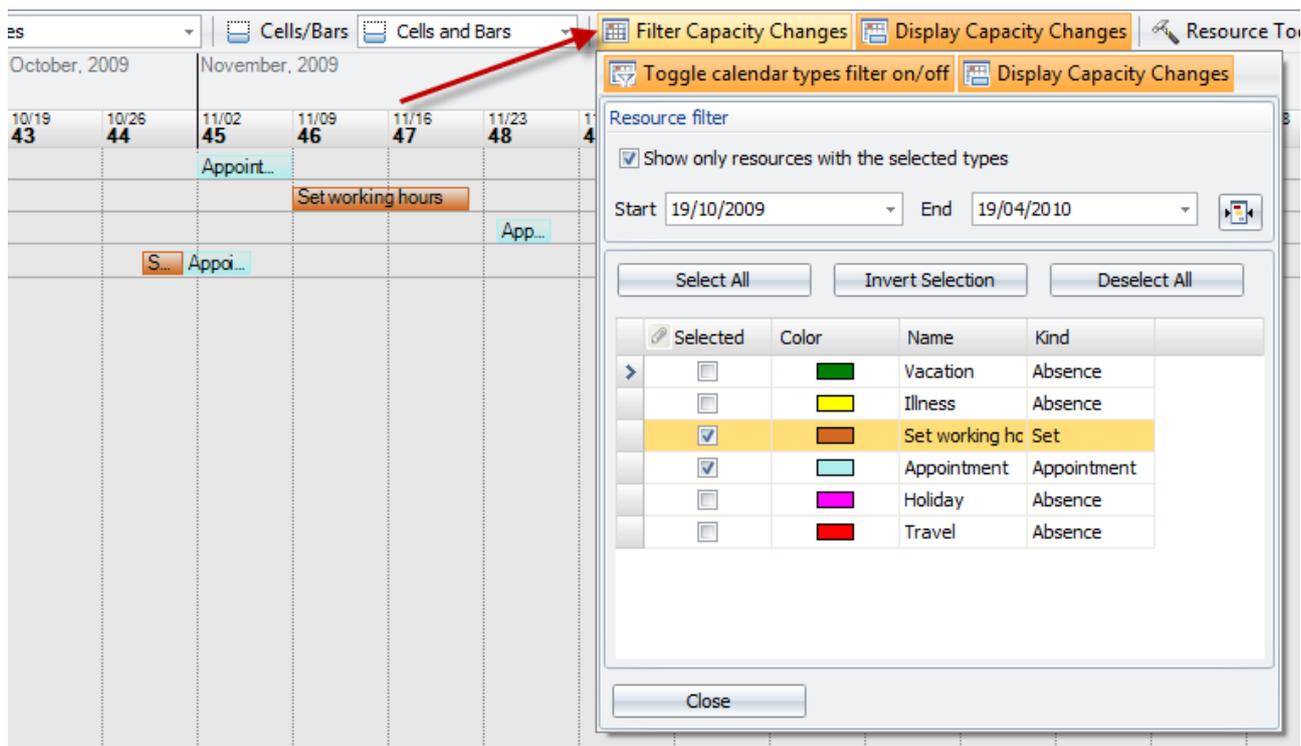
In the availability chart, you can filter to see which types of absence are present during a particular time period. Select “Filter Capacity Changes” to see specific types of absences. For instance, you might want only to see when people have summer vacation, so you would select “vacation” as the type. You might only want to see when people have appointments or set working hours, as can be seen in the below example.

You can select “Toggle calendar types filter on/off” to see the change in the chart, either filtering, or not filtering for the selected calendar type. By selecting “Show only resources with the selected types” you see only the people who have the type of absence you are interested in. Once you select this, you can set the range that you would like to see (for example, if you are looking for the people on vacation during July and

August, you would select July to August and then select “vacation” as the calendar type. If you select the small icon to the right of the date selector, you can select the visible Gantt chart area.

You can also individually select calendar types, or select all, invert selection, or deselect all.

Note: Common Calendar set holidays will show a holiday as a bar in the Gantt, and cannot be moved or modified.



1.3 People Tab

The people tab is exactly the same as the People Data perspective, it shows you people, their information and skills, and you can edit their details here.

People Availability | People | Absences | Work Week Hours | Calendar for 'Jan B' | Calendar types

+ New | Assign/Release Skill

Drag a column header here to group by that column

Name	Kind	Common Calendar	Work Week Hours	Depart
Oli H	Individual	DK General calendar	Parttime	SW Devel
Jan B	Individual	DK General calendar	Normal 37	SW Devel
Casper R	Individual	DK General calendar	Normal 37	SW Devel
Tony R	Individual	DK General calendar	Normal 37	SW Devel
Hugo M	Individual	DK General calendar	Normal 37	Managem
Lillian G	Individual	DK General calendar	Normal 37	SW Devel
Nils M	Individual	DK General calendar	Normal 37	Managem

1.4 Absences Tab

The absences tab is useful to show when people are away and their reason for being absent.

People Availability | People | Absences | Work Week Hours | Calendar for 'Jan B' | Calendar types

+ | Display | Capacity Changes | Cells/Bars | Cells and Bars | Filter C

Allocation Tools | View Options | Accounts | Man hours

Drag a column header here to group by that column

Name	Company	10/26	11/02	11/09	11/16	11/23	11/30	12/07
Oli H	Planning SW Inc.	44	45	46	47	48	49	50
Jan B	Planning SW Inc.		Appoint...			Holiday		
Casper R	Planning SW Inc.		Illne...	Set working hours				
Tony R	Maintenance Inc.					App...		Holiday
Hugo M	Consulting Inc.							
Lillian G	Consulting Inc.							
Nils M	Consulting Inc.							
Vanessa C	Consulting Inc.		S... Appoi				Reduced...	
Peter M								
Employee								

November, 2009 | December,

Illness
Casper R
Start: 04/11/2009
Finish: 07/11/2009
Description:

In the above screenshot, you can see a yellow block showing Illness for Casper in week 45; when the mouse is hovered over the yellow bar, a tooltip pops up showing the details of that absence.

Absences can be dragged and dropped in time just like projects or tasks. Absences can be set using the person calendar tab.

1.5 Work Week Hours Tab

Work week hours set a profile for scheduled work hours. This is typically done in the People Data perspective but can also be created in the Availability perspective by adding a new week, and filling in the daily hours of work for that profile. Different types of people can be assigned different work week hours.

	Nam	Monday	Tuesday	Wednes	Thursda	Friday	Saturda	Sunday	Total
>	Normal 37	8.0	8.0	8.0	8.0	5.0	0.0	0.0	37.0
	Parttime	0.0	8.0	8.0	8.0	0.0	0.0	0.0	24.0
	Overtime	8.0	8.0	10.0	10.0	10.0	5.0	0.0	51.0
	Freelance	5.0	2.0	2.0	2.0	1.0	5.0	0.0	17.0

1.6 Calendar Tab

The Calendar tab is activated by whichever resource is currently selected in either the People Availability or People tabs. (Note: you can also select multiple resources to set an absence such as a workshop, for many people at once). This calendar can be used to set absences. Begin by choosing a type of absence. If the type of absence you want is not there, you can make a new one in the Calendar Types tab. You can also create your own calendar types in the Calendar types tab simply by entering a new calendar type below the last entry and giving it a color and kind.

The screenshot shows the 'Calendar for 'Nils M'' interface. It features a calendar view for the year 2010, with months from March to August visible. A red arrow labeled 'Select dates' points to the date 05/04/2010 in the April calendar. Another red arrow labeled 'Choose type' points to the 'Type' dropdown menu, which is currently set to 'Holiday'. A third red arrow labeled 'Select Apply' points to the 'Apply' button at the bottom of the configuration panel. The configuration panel includes fields for 'Start' (05/04/2010), 'Finish' (08/04/2010), 'Duration' (4 days), and 'Description'. There is also a 'Private' checkbox and an 'Hours' field set to 0.

Select a range of dates using a click and hold of the left mouse key or manually set the dates in the form on the right. Select Apply. The absence will now show in the Absence tab and in the Gantt chart of the People Availability tab.

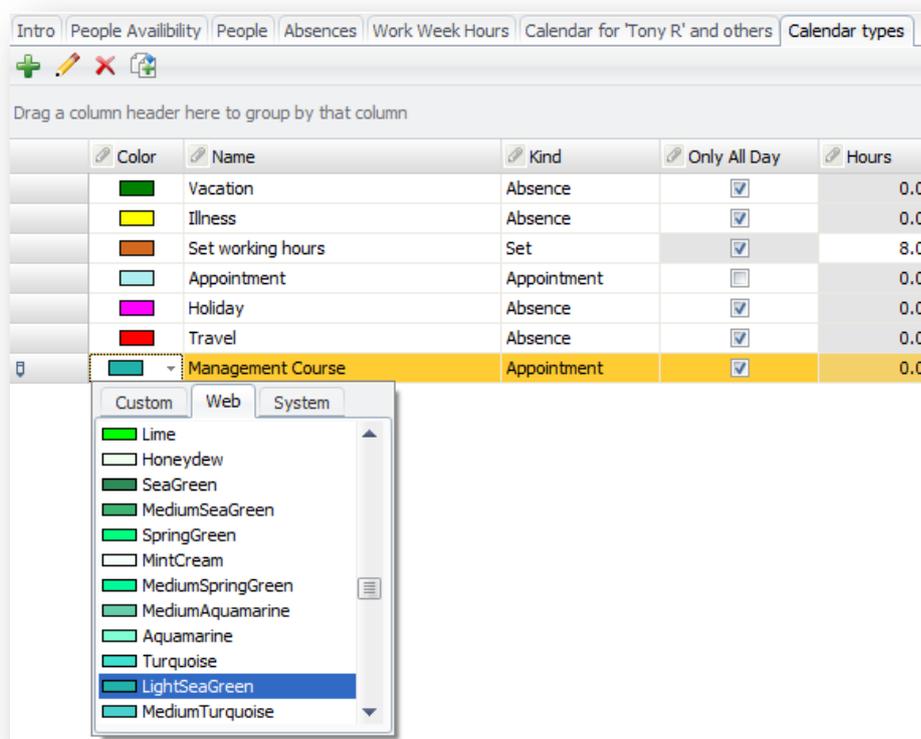
The All day check box can only be checked if it *not* enabled in the calendar types tab. Typically, only appointments can have hours specified, otherwise the absence is treated as an all day absence such as during a vacation or business travel.

You can also choose “Set Working Hours”. This sets the person’s working hours for that day to 8 hours as a default, although you can use the hours input area to set a specified amount of hours.

If you choose “Holiday” or “Illness” the person’s capacity will be zero for that day or time, they will be marked as absent from work. If however, you choose “Appointment” then that information is shown as being an appointment but not affecting their capacity for the day, instead it is a visual marker showing that they have an appointment.

1.7 Calendar Types tab

The calendar types tab functions the same way as people or customer data. You add a new type by selecting the green + sign in the upper left corner. Then select a color for that absence type. It will now be available to select as an absence type in the Calendar tab. You can also create your own calendar types simply by entering a new calendar type below the last entry and giving it a color and kind.





1.8 Kind:

The kind column determines whether or not a person's absence is an absence, an appointment, or an increase, decrease or set change in hours. Essentially, the kind column affects capacity directly. If the kind is an absence, the person's capacity for that day will be zero. If the kind is "increase" the hours entered will increase their regular capacity (typically 7.5 hours) by the amount of hours specified. For example, if a person works a 7.5 hour work day, and you select "increase" and set it to 3 hours, they will, for that day, have 10.5 hours of capacity. If you instead choose to "decrease" by 3 hours, they will have 4.5 hours of capacity. If you use the "set" kind, then you can set their capacity to be something other than 7.5, such as 10 hours.

Above, you can see the calendar types.

- Vacation refers to personal vacation and results in an absence from work for the day.
- Illness refers to a day off work, and results in an absence from work for the day.
- Set Working Hours allows you to set the person's working hours to a specific amount (in the hours column) for their daily work, or increase or decrease their normal daily working hours by a specific number of hours as specified in the hours column.
- Appointment is an appointment which occurs during the day and does not result in an absence from work.
- Holiday refers to company or standard holidays that result in an absence from work.
- Travel refers to travel for business purposes.

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