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# Opmetrix Leave Planner guide

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Quick reference guide

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Opmetrix version 4.9 onwards

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## Introduction

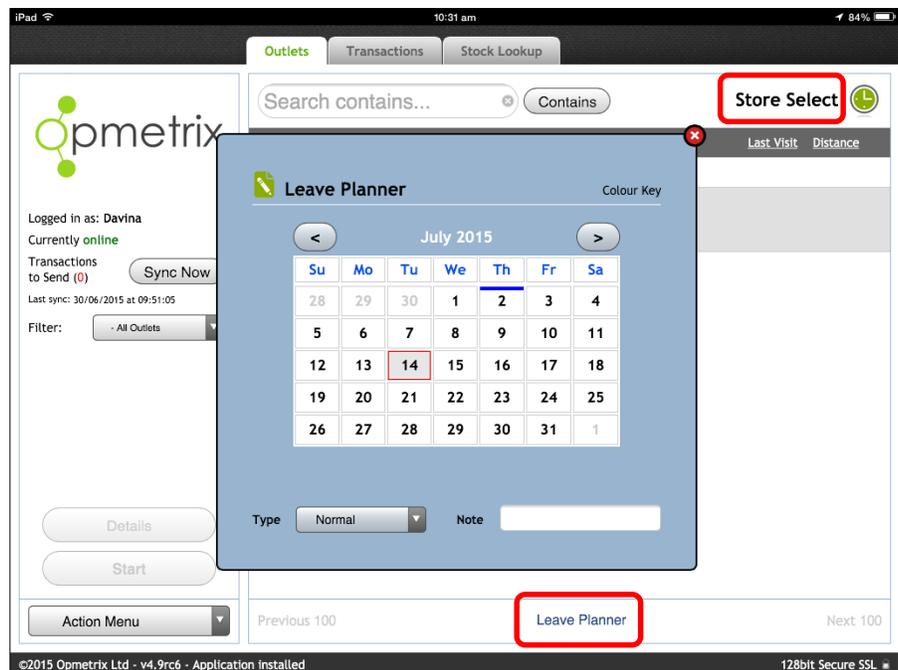
The Leave Planner module is designed to assist in the collection of holidays, annual leave and sick days by field teams. This can also include other types of leave not in the field such as training days.

Users can instantly record from within the Opmatrix app when they take sick leave and schedule and add their annual leave via their tablet device. Management can review and track active days worked, as well as report on leave totals and sick days taken.

In addition, the Leave module integrates with the Opmatrix Journey Plan module. Scheduled Journey Plan appointments that occur on days off can be excused, ensuring Journey Plan reporting compliance is accurate.

The Leave Planner has been designed to increase field performance activity reporting. It does not replace your payroll solution, but it can be used to assist payroll entry with the reporting of sick leave and annual leave.

**Note:** To find the Leave Planner on the Opmatrix app, go to the Store Select screen and tap on Leave Planner at the bottom centre of the display screen.



## Configuring your leave system

The first thing to do is for the Opmetrix administrator to set leave types – there is a maximum of five leave types. The three default settings are annual leave, public holiday and sick day. From here, two more optional leave types may be added. For example, bereavement, conference etc.

Each leave type can be set as absent or excused, which affects how compliance reports are measured.

### Absent

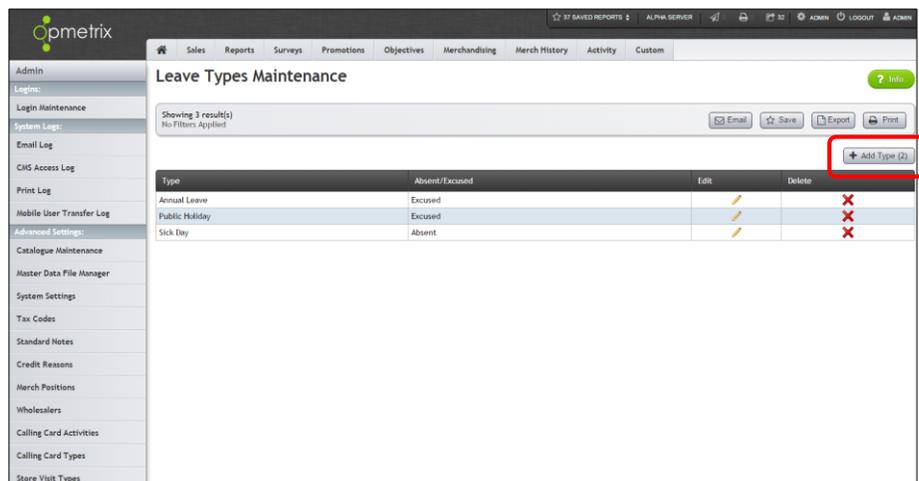
Leave Days marked absent means activities on those days were missed (e.g. Journey Plan appointments will show as missed).

### Excused

Leave Days marked excused means these activities will not show as missed (e.g. Appointments were excused on those days and therefore compliant)

Example: Commonly, sick day leave will have a type marked absent, and leave such as public holidays, bereavement, or conference days will be marked as excused. By default sick day is set to absent, and public holiday and annual leave are set to excused.

**Note:** In the Opmetrix CMS, administrators can set leave types in Leave Types Maintenance located under the Admin tab. Simply click 'Add Type'.



Type	Absent/Excused	Edit	Delete
Annual Leave	Excused		
Public Holiday	Excused		
Sick Day	Absent		

## Day Planner

The next step is for the administrator to set each user to the active days they usually work.

Use the **Day Planner** located on the **Activity tab** to display users and select the appropriate plan. There are two plan types:

### Set Active Days

Set to standard active days worked e.g. Monday – Friday

### Set to Journey Plan

Determine active days based on the appointments created in the Journey Plan. If a user has at least one appointment on any one day, it is considered an active day.

The administrator can select the ‘dig’ link besides the user’s name to switch to the appropriate plan.

**Note:** The Day Planner indicates the plan and the active days (green ticks), or the number of customers with appointment rules (Journey Plan mode).

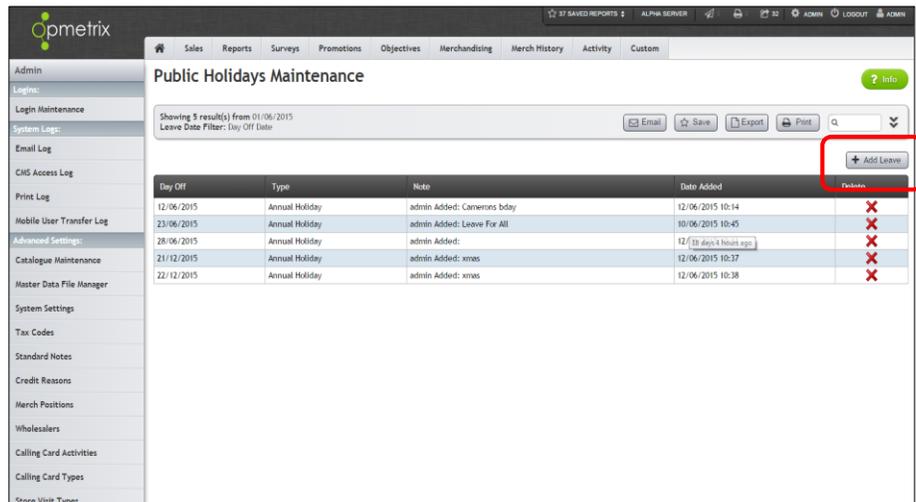
Device	Active Days	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Demo	0:0 Set By Week Plan	✓	✓					
Nick Brass	0:0 Set By Week Plan		✓	✓	✓			
The Boss	0:0 Set By Week Plan	✓	✓	✓	✓			
Elan	0:0 Set By Week Plan	✓	✓	✓	✓			
Rodney Bate	0:0 Set By Week Plan	✓	✓	✓	✓			
Scott Birley	0:0 Set By Week Plan	✓	✓	✓	✓			
David Barley	0:0 Set By Week Plan	✓	✓	✓	✓			
Cameron	0:0 Set By Week Plan	✓	✓		✓			
Renee	0:0 Set By Week Plan	✓	✓	✓	✓			
DJ	0:0 Set By Week Plan	✓	✓	✓	✓			
Nate	0:0 Set By Week Plan	✓	✓	✓	✓			
Nate Walker	0:0 Set By Week Plan	✓	✓	✓	✓			
Transactions from Beta	0:0 Set By Week Plan	✓	✓	✓	✓			
Oliver Huggins	0:0 Set By Week Plan	✓	✓	✓	✓			
pay1	0:0 Set By Journey Plan - 1 Outlets have rules							
pay2	0:0 Set By Journey Plan - 0 Outlets have rules							
Oliver	0:0 Set By Week Plan	✓	✓	✓	✓			
Rod	0:0 Set By Week Plan	✓	✓	✓	✓	✓		

## Public Holidays Maintenance

Administrators can add public holidays directly from the Opmetrix CMS and these apply to ALL field users. We recommend you do this once a year to ensure all public holidays have been entered.

A user can still override a public holiday and change to a normal (working) day if they wish.

**Note:** Under the Admin tab, select Public Holidays Maintenance and click the Add Leave button to enter leave details, including date, type of leave and notes.



The screenshot displays the 'Public Holidays Maintenance' page in the Opmetrix CMS. The page includes a navigation menu on the left with 'Admin' selected. The main content area shows a table of public holidays. The 'Add Leave' button is highlighted with a red box.

Day Off	Type	Note	Date Added	
12/06/2015	Annual Holiday	admin Added: Canemans bday	12/06/2015 10:14	<input checked="" type="checkbox"/>
23/06/2015	Annual Holiday	admin Added: Leave For All	10/06/2015 10:45	<input checked="" type="checkbox"/>
28/06/2015	Annual Holiday	admin Added:	12 / 18 days (4 hours ago)	<input checked="" type="checkbox"/>
21/12/2015	Annual Holiday	admin Added: xmas	12/06/2015 10:37	<input checked="" type="checkbox"/>
22/12/2015	Annual Holiday	admin Added: xmas	12/06/2015 10:38	<input checked="" type="checkbox"/>

## Journey Plan Compliance

If the Journey Plan module is used in Opmetrix to set call cycles and regular appointments for users, any leave days will show as absent or excused in the Journey Plan Compliance reporting.

**Note:** Journey Plan Compliance is located under the Activity tab. This is where administrators can filter results according to ‘this week’, ‘this month’ etc using the Smart Search box to view data in a particular time-frame.

Device Login	Scheduled Calls	Excused Calls	Possible Calls	Completed Calls	Missed Calls	% Completed
Carverton	81	0	81	0	81	0%
David Bailey	1	0	1	0	1	0%
Demo	42	1	41	0	41	0%
Elan	10	0	10	0	10	0%
The Boss	70	0	70	0	70	0%
Renée	220	0	220	0	220	0%
pay1	9	0	9	0	9	0%
<b>All</b>	<b>433</b>	<b>1</b>	<b>432</b>	<b>0</b>	<b>432</b>	<b>0%</b>

## Reports

The Leave Planner contains three reports which are found under the Opmetrix CMS Activity tab. The Activity tab is located at the top of the screen on the right hand side, next to the logout button.

**Leave Planner Log** – shows the leave entries users have made.

**Note:** Click on ‘dig’ in the last updated column to see more information including any notes made regarding leave, or any updates or multiple changes made to that leave day.

Device	Date	Leave Type	Note	Last Updated
DJ	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Scott Birley	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Elan	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Nate Walker	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Nate	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Oliver Huggins	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Transactions from Beta	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Rod	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Oliver	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Renee	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
David Barley	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
pay1	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
The Boss	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Nick Braas	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Rodney Bate	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Cameron	28/06/2015	Annual Holiday	admin Added:	12/06/2015 10:11 <a href="#">Dig</a>
Rod	26/06/2015	Annual Holiday		06/05/2015 17:01 <a href="#">Dig</a>
Rod	25/06/2015	Annual Holiday		06/05/2015 17:01 <a href="#">Dig</a>
Transactions from Beta	24/06/2015	Annual Holiday	admin Added: Leave For All	10/06/2015 10:45 <a href="#">Dig</a>
pay1	23/06/2015	Annual Holiday	admin Added: Leave For All	10/06/2015 10:45 <a href="#">Dig</a>
pay2	23/06/2015	Annual Holiday	admin Added: Leave For All	10/06/2015 10:45 <a href="#">Dig</a>
DJ	23/06/2015	Annual Holiday	admin Added: Leave For All	10/06/2015 10:45 <a href="#">Dig</a>

**Leave Planner Summary** – this displays the total number of leave days for each user. The reporting dates can be changed. For example, set to ‘today’ to see who is on leave today or set to ‘this week’ to see the total number of leave days for the field team this week.

**Note:** Leave Planner Summary is located under the Activity tab. It displays all five leave types set by admin.

‘Dig’ on any one of the leave types to view leave details including date, notes and when the leave was last updated.

Device	Annual Leave	Public Holiday	Sick Day	Total
Cameron	0	0	0	0
DJ	0	0	0	0
David Barley	0	0	0	0
Demis	0	1	1	2
Elan	0	0	0	0
Nate	0	0	0	0
Nate Walker	0	0	0	0
Nick Braas	0	0	0	0
Oliver	0	0	0	0
Oliver Huggins	0	0	0	0
Renee	0	0	0	0
Rod	0	0	0	0
Rodney Bate	0	0	0	0
Scott Birley	0	0	0	0
The Boss	0	0	0	0
Transactions from Beta	0	0	0	0
pay1	0	0	0	0
pay2	0	0	0	0
<b>All</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>2</b>
Device	Annual Leave	Public Holiday	Sick Day	Total

**Active Days Compliance** – this shows the possible number of days a user can work (based on Journey Plan or Week Plan) and compares with the days in which store visits occurred. This report also observes users ‘Not Accounted For’ and what exceptions these may entail.

Tip: We recommend setting this report to be sent automatically to key management on a weekly basis. It provides a great indicator on how productive the field team are week by week.

**Note:** Active Days Compliance is found under the Activity tab.

Use the ‘dig’ button to find specific details on results shown e.g. ‘dig’ on excused days will show leave type and when it was taken.

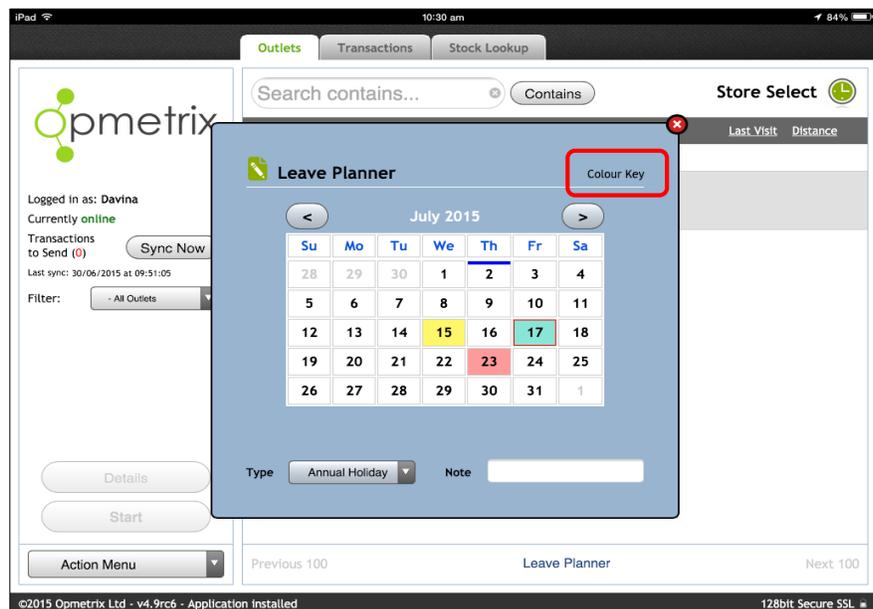
Device	Days On	Excused Days	Possible Days	Store Visit Days	Absent Days	Not Accounted For
Carmon	14	0	14	0	0	14
EJ	22	0	22	0	0	22
David Barley	22	0	22	0	0	22
Dennis	22	1	21	0	1	20
Elson	22	0	22	0	0	22
Nate	22	0	22	0	0	22
Nate Walker	22	0	22	0	0	22
Nick Ross	13	0	13	0	0	13
Oliver	22	0	22	0	0	22
Oliver Huggins	22	0	22	0	0	22
Renew	22	0	22	0	0	22
Road	22	0	22	0	0	22
Rodney Bate	22	0	22	0	0	22
Scott Birley	22	0	22	0	0	22
The Boss	22	0	22	0	0	22
Transactions from Beta	22	0	22	0	0	22
pay1	9	0	9	0	0	9
pay2	0	0	0	0	0	0
<b>All</b>	<b>344</b>	<b>1</b>	<b>343</b>	<b>0</b>	<b>1</b>	<b>342</b>

## On the Opmetrix field app

The Opmetrix app only displays the Leave Planner when the user is in Outlets on the Store Select screen. Tap on Outlets and at the bottom of the screen it will display Leave Planner. Click on Leave Planner to bring up the calendar.

Users can update leave at any time. Leave such as holidays can be entered as far into the future as users would like however, the ability to set leave in the past (e.g. mark last week as sick day or normal day) is set by head office.

**Tip:** To see which type of leave has been taken, use the colour key on the Opmetrix app. Simply tap 'Colour Key' located at the top right hand corner of the Leave Planner screen.



## Editing leave

Leave such as holidays can be entered as far into the future by users as they like however, the ability to edit leave in the past (e.g. mark last week as sick day or normal day) is set by head office.

The recommended option is to allow users to have the ability to edit leave to the same as your pay cycle e.g. If the field team are paid weekly then they have the ability to edit last week (seven days) in case they forgot to mark a day correctly.

Leave editing can also be restricted to today only or any number of days back. The default setting is seven days. To update this setting contact the Opmetrix support team: [support@opmetrix.com](mailto:support@opmetrix.com).