

SOP for Managers and Supervisors **Planned and Unplanned Leave Work Orders**

Scope

Work orders of **PLANNED** and **UNPLANNED** have been created as a tool for assisting Managers and/or Supervisors with scheduling of work orders to an employee's daily assignments. This tool gives Managers and/or Supervisors a "placeholder" for leave on employee's daily assignments. Thus, serving as a reminder to those assigning work when an employee is out on leave and unavailable for work assignments.

It should be emphasized that **NO** actual employee leave time is to be entered on these work orders by the employee. The employee will continue to record leave on the paper timecard used today.


Definitions

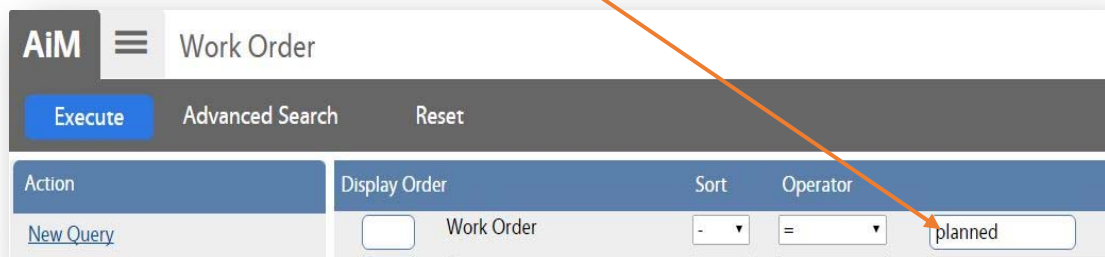
PLANNED leave is defined as any request for leave that is given with ample time to schedule or "plan" for the employee's absence. Planned leave can also be Administrative, FMLA, or Holiday leave. The PLANNED leave work order should never be used for paying leave or for charging leave.

UNPLANNED leave is defined as last minute requests for leave that are not given with ample time to schedule or "plan" for the employee's absence. The UNPLANNED work order should never be used for paying leave or for charging leave.

Managers and Supervisors should ensure no charges are made to these work orders during time card reconciliation.

Work Steps for assigning PLANNED or UNPLANNED leave:

1. From Desktop select **Work Management**
2. Press the search icon  next to **Work Order**
3. Put either **Planned** or **Unplanned** in the **Work Order** box and hit the **Execute** button



The screenshot shows the AiM Work Order interface. At the top, there is a search bar with the text "Work Order". Below the search bar, there are three buttons: "Execute", "Advanced Search", and "Reset". The "Execute" button is highlighted in blue. Below the buttons, there is a table with columns: "Action", "Display Order", "Sort", and "Operator". The "Action" column has a link "New Query". The "Display Order" column has a dropdown menu with "Work Order" selected. The "Sort" column has a dropdown menu with "-" selected. The "Operator" column has a dropdown menu with "=" selected. The "Work Order" box is highlighted in blue and contains the text "planned". An orange arrow points from the text "Planned" in step 3 of the list to the "planned" text in the "Work Order" box.

4. Select either the **Planned** or **Unplanned** work order

| Action | Work Order #1 | Description | Status | Type | Category | Region | Facility | Property | Date Created |
|---|-------------------------|---|--------|----------------|-----------------|----------------|----------------|----------|-----------------------|
| Export Print View | PLANNED | PLANNED LEAVE - Work order being used for planned leave scheduling on daily assignments. Work order is not to be used for paying leave or for charging leave. No time should be charged to this work order at any time. | OPEN | ADMINISTRATIVE | NON-COSTED TIME | OSU-STILLWATER | CENTRAL CAMPUS | 0079 | Nov 19, 2015 04:23 PM |

5. Select the **Phase** corresponding to the Shop you are scheduling Leave for

| Phase | Description | Location | Shop | Work Code | Priority | Status |
|-------|---|----------|------|--------------|----------|--------|
| 001 | PLANNED LEAVE - Work order being used for planned leave scheduling on daily assignments. Work order is not to be used for paying leave or for charging leave. No time should be charged to this work order at any time. | | Z1 | MULTIFARIOUS | ADMIN | OPEN |
| 002 | PLANNED LEAVE - Work order being used for planned leave scheduling on daily assignments. Work order is not to be used for paying leave or for charging leave. No time should be charged to this work order at any time. | | Z2 | MULTIFARIOUS | ADMIN | OPEN |

6. On **Phase** screen select Shop Assignment

Phase 001

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Status: [OPEN](#)
Work Order: [PLANNED](#)
Budget: \$0.00
Location:

Shop: Z1
O&M ZONE 1 - AAD0561

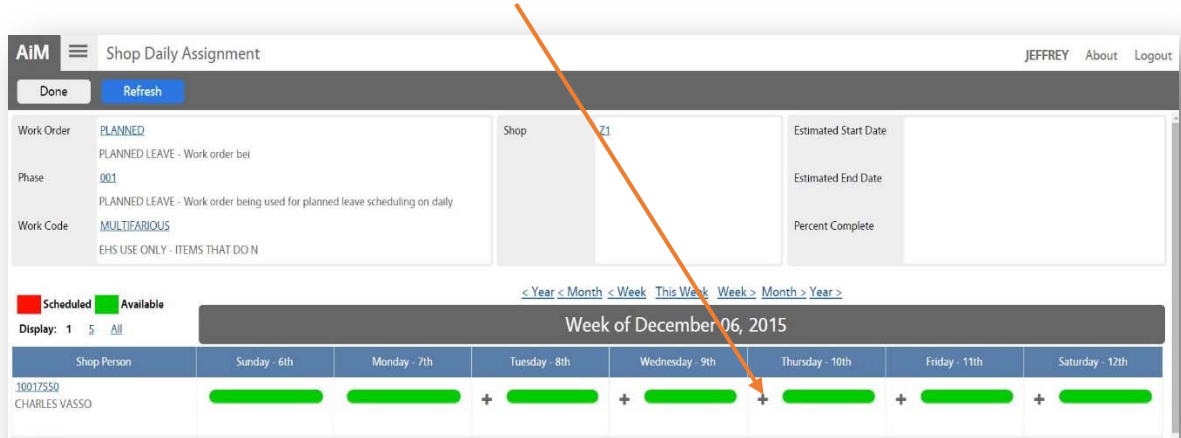
Estimated Start:
Estimated End:
Actual Start:

Funding Method: Work Order
Work Code Group:
Work Code: MULTIFARIOUS

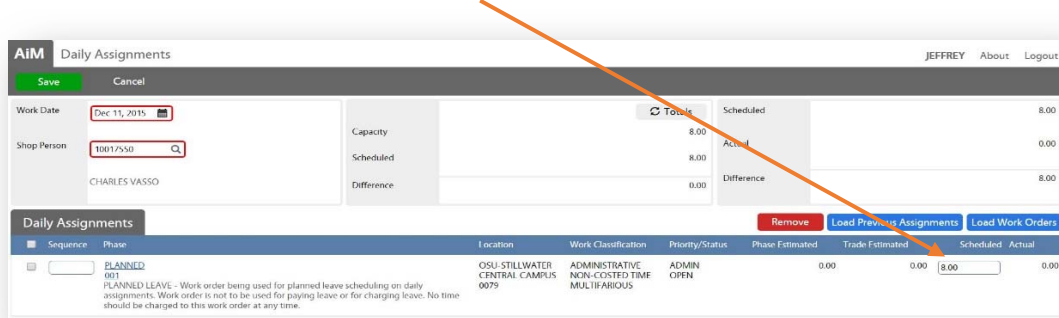
Primary Person:

- ViewFinder
- Timecard
- External Charge
- Material Request
- Shop Assignment**
- Work Planner
- Work Scheduler
- Daily Assignment Browse
- Email
- Print

- On **Shop Daily Assignment** screen select the **+** icon on the date that leave will be taken



- On **Daily Assignments** screen enter the number of hours of leave to be taken and press the **Save** button



- Planned** or **Unplanned** leave is now complete and scheduled to the employee's daily assignment
- Reminder, no employee leave time is to be charged to the **PLANNED** or **UNPLANNED** phases. In the event an employee accidentally does record leave hours on one of these work orders a correction will need to be made (see payroll supervisor for further assistance if needed). Managers and/or Supervisors should check timecard details for accuracy before approving timecards. Timecard details can be seen by clicking the **Transaction hyperlink** on the time card approval screen (see Timecard Approval for further details).

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