Critical manufacturing
an ASM PT company

Cover Employee Absence

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Cover Employee Absence

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Overview

An employee absence can leave a shift short of qualified personnel. Shift Planning lets you temporarily reassign a qualified colleague to cover the gap.

This page contains two scenarios:

- Coverage within a **Team**/Shift - cover an absence by moving a cross-certified employee.
- Coverage from another **Team** - handle two absences in a **Team**, offer a replacement from another **Team** through the pool, and record the availability of an off-duty **Employee** as backup. Verify coverage in both **Teams**.

Before You Start

Complete Shift Planning Configuration and restore the starting assignments after Calendar Day Types.

Item	Required state
Access	Sign in as the manager of the operating **Employees**, with the access listed in Shift Planning Configuration.
Exercise date	Third date of the generated interval, counting its start as day 1. **Calendar Day** generation used **Start Position** `1`; **Employee Calendar Days** exist for the same date.
Shift and **Team**	`TeamA` works Shift 2, `TeamD` works Shift 1, `TeamB` works Shift 3, and `TeamC` is off-duty.
Starting assignments	`A1`, `A2`, and `A3`: `ControllerAssemblyOperator`. `A4`: `ControllerTestTechnician`. All belong to `TeamA`.

Item	Required state
Qualifications	`A3` holds both `ControllerAssemblyOperator` and `ControllerTestTechnician` **Certifications**.
Absence type	`Absence` exists in Generic Table `CalendarDayType`, with **IsWorkingDay** and **IsSystem** set to `false`.
Exceptions	`A1` - `A4` have no absence, non-working-time, pool, availability, or temporary-assignment exceptions on the exercise date. No other **Employee** temporarily covers Final Test on Shift 2.

Table: Absence-coverage starting conditions

Open `ControllerProductionShiftPlan` > **Calendar**, display the exercise date, and select `ControllerAssembly` and `ControllerFinalTest` in the **Workgroup** filters. Clear any previous validation results. Keep permanent **Employee** assignments unchanged throughout the exercise.

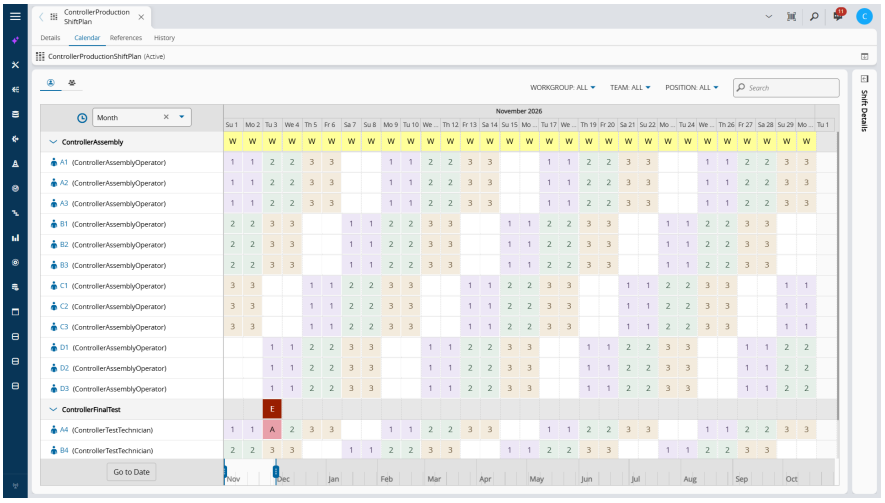
Coverage within a Team

Record Absence

1. Confirm the starting Shift 2 counts: three Assembly Operators (`A1`, `A2`, `A3`) and one Test Technician (`A4`).
2. Select only `A4` on the exercise date. Select **Set Non-Working Days**, choose `Absence` as **Non-Working Day Type**, and select **Set**.
3. Keep the **Employee Calendar Day** for `A4` selected and select **Validate**.
4. Inspect the warning and error indicators above the exercise date and hover over them to read the Shift 2 messages. Confirm both results:

Workgroup	Required	Available	Expected result
`ControllerAssembly`	`2` Assembly Operators	`3`: `A1`, `A2`, `A3`	Surplus warning (`W`).
`ControllerFinalTest`	`1` Test Technician	`0`	Shortage error (`E`).

Table: Shift 2 coverage with A4 absent



Useful Documentation

Temporarily Assign Employee

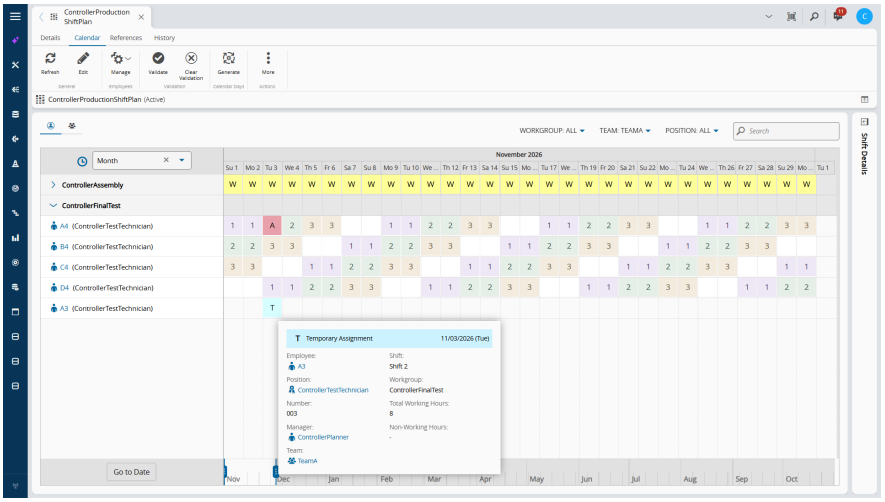
1. Select only `A3` on the exercise date. Confirm the **Calendar Day** is working, `A3` has no non-working-day exception, and **Is Temporarily Assigned** is `false`. Verify the Active `ControllerTestTechnician` **Certification**.
2. Select **Assign Temporarily** and enter the following values:

Field	Value
Workgroup	`ControllerFinalTest`
Team	`TeamA`
Position	`ControllerTestTechnician`

Table: Temporary destination for A3

3. Select **Assign**. Confirm **Is Temporarily Assigned** is `true` and the saved destination matches the table. Keep the absence of `A4` recorded.
4. Select the **Employee Calendar Day** for `A4`, which still has **Non-Working Day Type** set to `Absence`, and select **Validate** again.

5. Confirm the previous Shift 2 Assembly surplus warning and Final Test shortage error are no longer reported. `A4` remains absent; `A3` supplies the required Final Test coverage. **Teams** D and B retain their original assignments and Assembly surplus on Shifts 1 and 3.



Useful Documentation

Coverage from Another Team

Team A cannot always cover a shortage internally. In this exercise, `A2` and Test Technician `A4` are absent, so `A1` and `A3` must remain in Assembly. The planner needs a qualified replacement from another **Team**.

Team D will offer working `D3` through the pool as the intended replacement for **Team** A. Record the availability of off-duty `C3` as a backup in case the planned reassignment cannot go ahead. Plan the change before Shift 1 starts: `D3` will move from Shift 1 to Shift 2, rather than work both shifts.

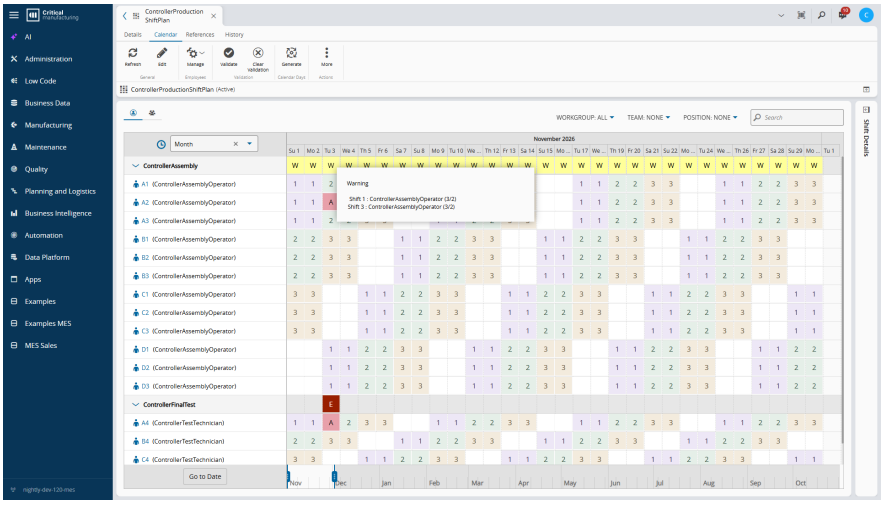
Prepare the Team Shortage

1. On the same exercise date, remove the temporary assignment for `A3` from the preceding exercise using **Remove** > **Remove Temporary Assignment** > **Remove**. Keep the absence of `A4` recorded.
2. Check the additional participants before proceeding:

Employee	Starting assignment	Qualification and exceptions
`D3`	`TeamD`, Shift 1, `ControllerAssembly`.	Both operating **Certifications** are Active; no absence, pool, availability, or temporary-assignment exception.
`C3`	`TeamC`, off-duty, normally `ControllerAssembly`.	Both operating **Certifications** are Active; **Employee Calendar Day** exists, no absence or other exception, and work availability is unset.

Table: Cross-team participants

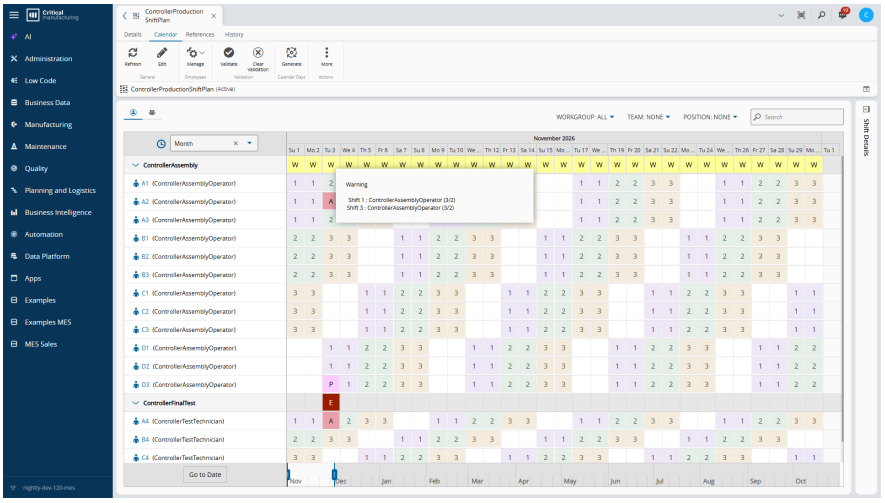
3. Select only `A2` on the exercise date. Select **Set Non-Working Days**, choose `Absence`, and select **Set**.
4. Select the absence record for `A4` and **Validate**. Inspect Shift 2: Assembly has `A1` and `A3` against a requirement of two; Final Test has no technician against a requirement of one. Moving `A3` would now create an Assembly shortage, so leave `A3` in place.



Useful Documentation

Offer Employee Through the Pool

1. Inspect the Shift 1 staffing of **Team** D. Confirm three Assembly Operators (`D1`, `D2`, `D3`) and one Test Technician (`D4`). Releasing `D3` would leave the two required Assembly Operators.
2. Select only `D3` on the exercise date. Confirm **Is Employee Working Day** is `true`, **Is In Pool** is `false`, and **Is Temporarily Assigned** is `false`.
3. Select **Place In Pool**, review the **Employee** and date, and select **Place**.
4. Confirm **Is In Pool** is `true`. `D3` is offered for reassignment but still has the normal **Team** D assignment. Pool placement alone does not fill the shortage in **Team** A.

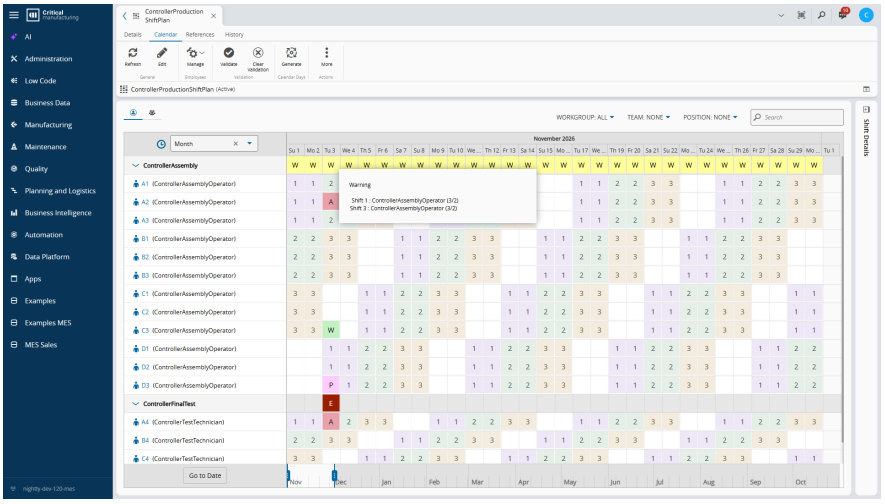


Useful Documentation

Record Employee Availability as a Backup

`D3` remains the intended replacement. Record the availability of `C3` so there is a possible backup if `D3` cannot cover the absence. Availability alone does not assign `C3` to the shift.

1. Select only `C3` on the same date. Confirm **Is Calendar Working Day** is `true`, **Is Employee Working Day** and **Is Available To Work** are `false`, and **Non-Working Day Type** is unset.
2. Select **Set Work Availability**, review the **Employee** and date, and select **Set**.
3. Confirm **Is Available To Work** is `true` while `C3` remains off-duty. Pool placement is for a working **Employee**; work availability is for an off-duty **Employee**. Neither operation alone creates a temporary assignment.



Useful Documentation

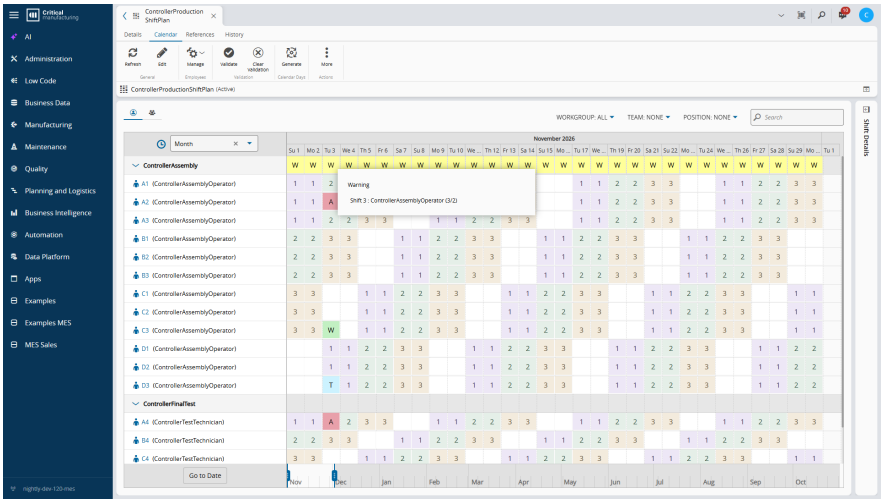
Temporarily Assign Employee to Team

1. Select only `D3` on the exercise date.
2. Select **Assign Temporarily** and enter:

Field	Value
Workgroup	`ControllerFinalTest`
Team	`TeamA`
Position	`ControllerTestTechnician`

Table: Cross-team temporary destination

3. Select **Assign**. Confirm **Is Temporarily Assigned** is `true` and the saved destination is `TeamA` / `ControllerFinalTest` / `ControllerTestTechnician` on Shift 2. Verify that `D3` is no longer counted on Shift 1 of **Team** D. If the displayed assignment does not match, resolve the discrepancy before accepting the coverage change.



Useful Documentation

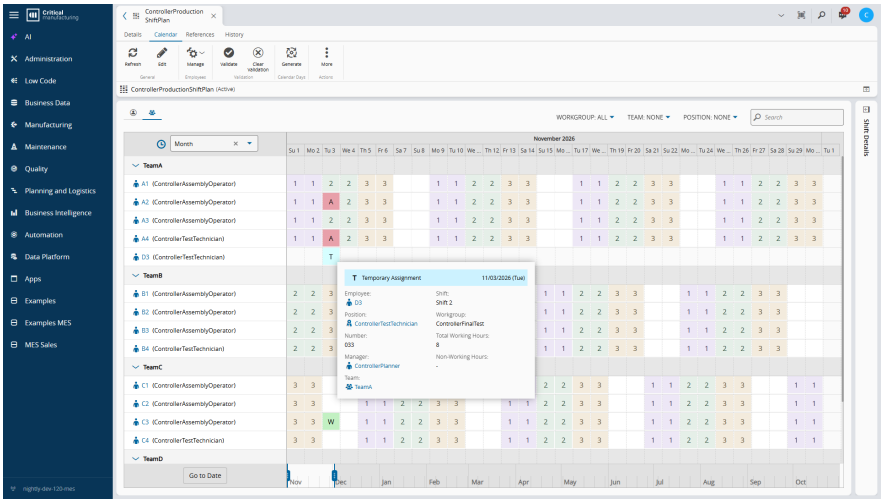
Verify Coverage in Both Teams

1. Select the **Employee Calendar Day** for `A4` and select **Validate**.
2. Verify the assignments directly and inspect the current validation results:

Team and shift	Assembly: required / available	Final Test: required / available
`TeamA`, Shift 2	`2 / 2`: `A1`, `A3`	`1 / 1`: temporarily assigned `D3`
`TeamD`, Shift 1	`2 / 2`: `D1`, `D2`	`1 / 1`: `D4`

Table: Staffing after cross-team reassignment

3. Confirm the Final Test shortage in **Team** A is resolved without creating a shortage in **Team** D. **Team** B remains unchanged on Shift 3, including its Assembly surplus. `C3` remains an unassigned backup.



Useful Documentation

In the first scenario, Assembly had enough qualified **Employees** to cover Final Test internally. In the second, another absence removed that flexibility, so coverage came from **Team** D while preserving its required staffing. `C3` remained available as a backup.

Return to Shift Planning to review the configuration and learning path.

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