

Managing Employees' Time off with Capacity



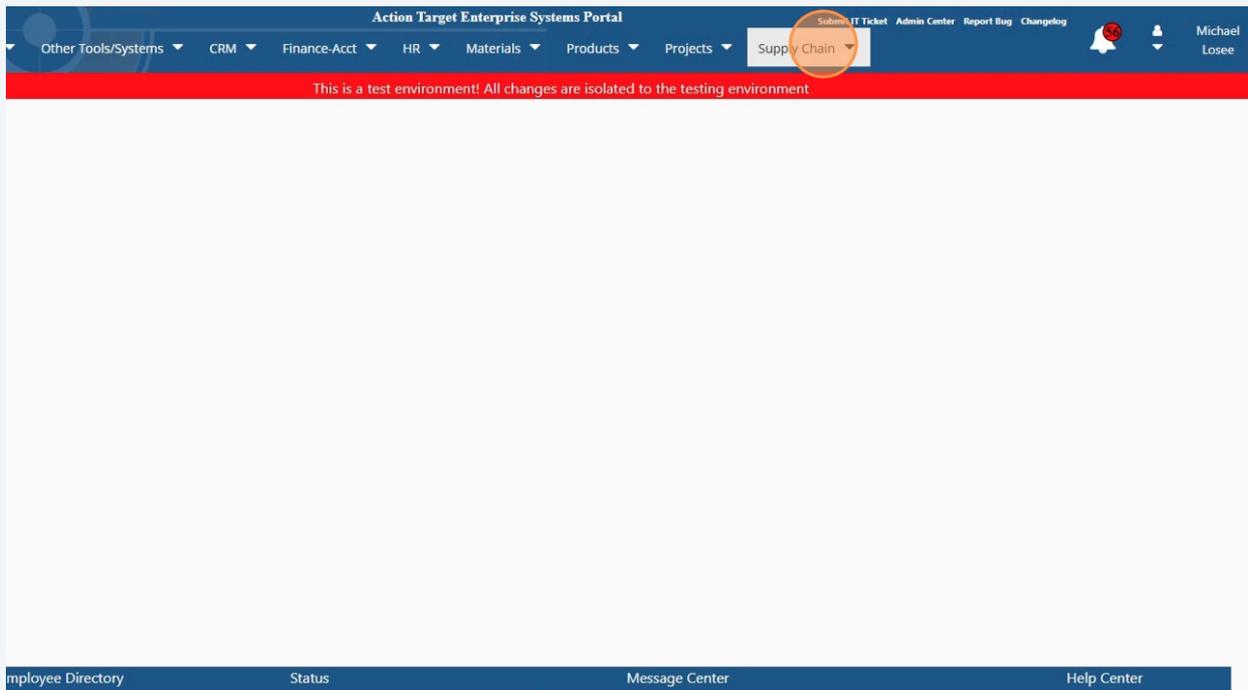
The below steps show how to create employees' time off to affect capacity.

1 Navigate to the Action Target Enterprise Portal.

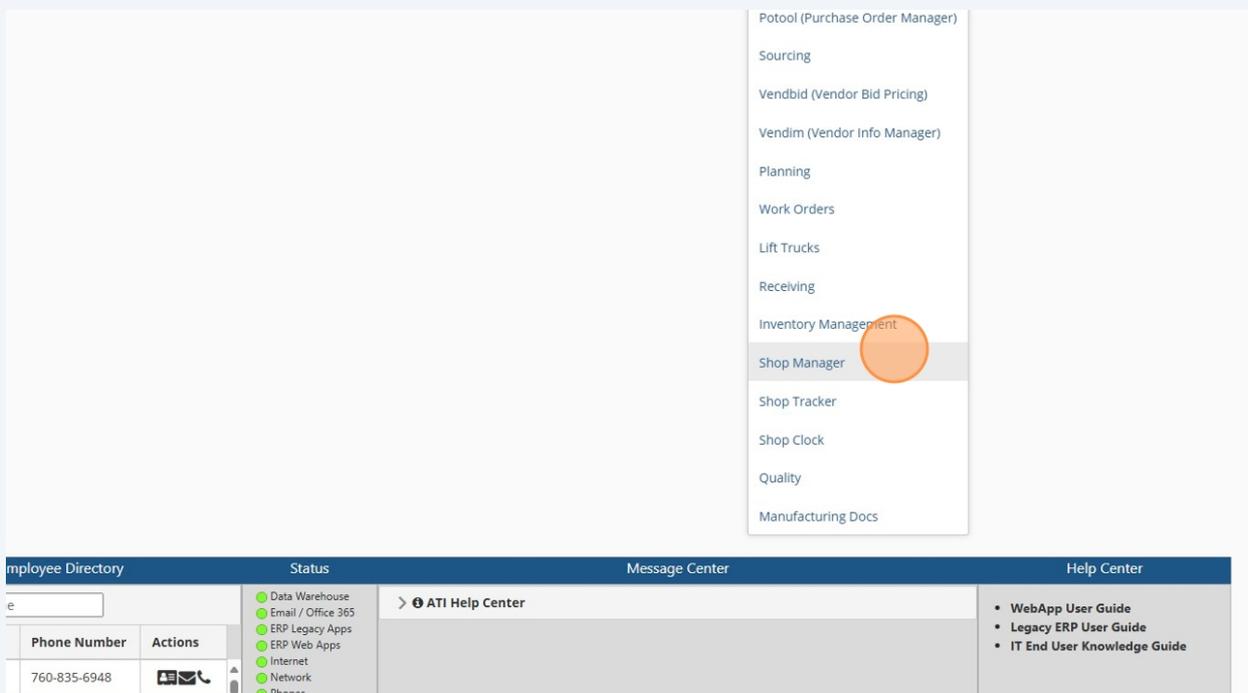
This is a test environment. All changes are isolated to the testing environment.

Employee Directory			Status	Message Center	Help Center
<input type="text" value="Employee Name"/>			<ul style="list-style-type: none">Data WarehouseEmail / Office 365ERP Legacy AppsERP Web AppsInternet	> ATI Help Center	<ul style="list-style-type: none">WebApp User GuideLegacy ERP User GuideIT End User Knowledge Guide
Employee Name	Phone Number	Actions			

2 Click on the "Supply Chain" menu located at the top of the portal.



3 Click on the "Shop Manager" option from the drop down menu.



4 Click the "Capacity" tab located near the top of the tool.

The screenshot shows the 'Shop Manager' interface. At the top, there is a navigation bar with various menu items like 'Legacy ERP', 'CRM', 'Finance-Acct', etc. Below this is a red banner that reads 'This is a test environment! All changes are isolated to the testing environment'. The main header area contains several tabs: 'Schedule', 'Work Bench', 'Nesting', 'Setup', 'Management', 'Capacity', 'Documents', 'Time', 'Jobs', 'WO Data', and 'Tables'. The 'Capacity' tab is highlighted with a red circle. Below the tabs is a 'Schedule Builder' section with buttons for 'Show Master', 'Hide Schedule', 'Show Hours', 'Show Op Time', and 'Show Logs'. The main content area is titled 'Shop Schedule' and contains a table with columns for Priority, WO ID, MTR, op_seq, Req Qty, Part Number, Description, Operation, Next Op Name, WO Descr, Start, and St. The table lists several work orders, with the last three rows highlighted in yellow.

Priority	WO ID	MTR	op_seq	Req Qty	Part Number	Description	Operation	Next Op Name	WO Descr	Start	St
6	56932	mo-167326-1	1	26	8425	Desktop Clear	assembly-pa		Desktop Clearing Trap Asse	2025-03-07	sta
6	57493	mo-168225-1	1	5	23614	PT Gong Kit, M	assembly-pa		PT Gong Kit, Multi-Star, W/	2025-04-01	in-p
6	57071	mo-167603-1	1	5	23614	PT Gong Kit, M	assembly-pa		PT Gong Kit, Multi-Star, W/	2025-04-18	que
6	58695	mo-170270-3	1	16	33993	Autotargets, C	elec-assembly		AutoTargets Lift Unit Versio	2025-04-24	sta
6	58640	mo-170198-1	1	36	17861	TCT 5 CAM Kit	assembly-pa		TCT 5 CAM Kit, Left End	2025-04-28	in-p
6	58641	mo-170200-1	1	36	17863	TCT 5 CAM Kit	assembly-pa		TCT 5 CAM Kit, Right End	2025-04-28	in-p
6	58074	mo-169332-1	1	10	7621	-REDLINE- TCM	elec-assembly		-REDLINE- TCM bank	2025-04-29	sta
6	58093	mo-169360-1	1	1	46546	DRM-Pro Cont	elec-assembly		DRM-Pro Control Panel - Dc	2025-04-30	que
6	58048	mo-169290-1	1	2	46547	DRM-Pro Cont	elec-assembly		DRM-Pro Control Panel - Dc	2025-05-02	in-p

5 Click the "Show Time Off" button located in the Capacity Management Header.

The screenshot shows the 'Capacity Management' interface. At the top, there is a navigation bar with various menu items like 'Legacy ERP', 'CRM', 'Finance-Acct', etc. Below this is a red banner that reads 'This is a test environment! All changes are isolated to the testing environment'. The main header area contains several tabs: 'Schedule', 'Work Bench', 'Nesting', 'Setup', 'Management', 'Capacity', 'Documents', 'Time', 'Jobs', 'WO Data', and 'Tables'. The 'Capacity' tab is highlighted with a red circle. Below the tabs is a 'Capacity Management' section with buttons for 'Show Employee Setup', 'Show Exceptions', 'Show Time Off', 'Show Holidays', 'Show Resources', 'Show Graph Details', 'Graph', and 'Refresh Capacity'. The 'Show Time Off' button is highlighted with a red circle. Below the buttons is a 'Capacity Report' section with summary statistics: 'Total Weekly: 1146', 'Total Daily: 229.2', 'Last Refresh: 5/22/2025 9:45:03 AM', 'Scheduled: 9352.93', 'Planned: 7341.31', 'BackLog: 2298.33', 'Pending: 425.64', and 'Quote: 0'. Below the report is a 'Total Capacity' section with a bar chart showing Capacity, Scheduled, Planned, Pending, and Quote.

Capacity Report

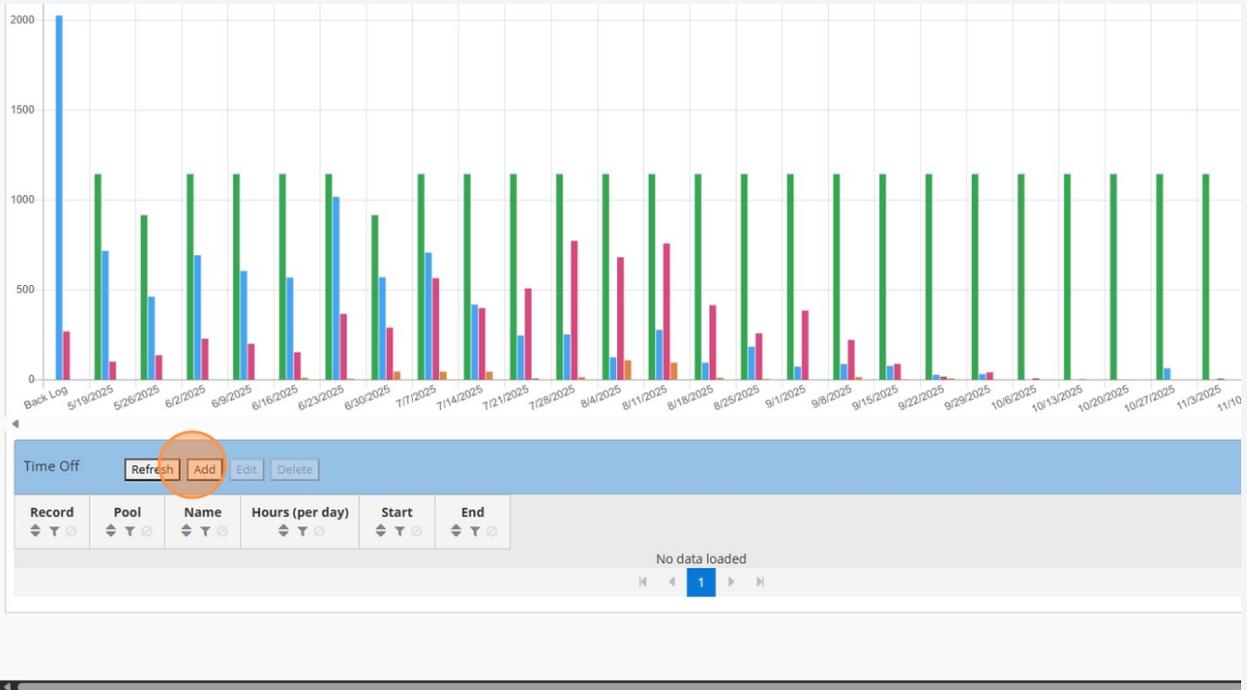
- Total Weekly: 1146
- Total Daily: 229.2
- Last Refresh: 5/22/2025 9:45:03 AM
- Scheduled: 9352.93
- Planned: 7341.31
- BackLog: 2298.33
- Pending: 425.64
- Quote: 0

Total Capacity

Legend: Capacity (Green), Scheduled (Blue), Planned (Pink), Pending (Orange), Quote (Yellow)

6 Scroll down below the graph to see the Time off list.

7 Click the "Add" button in the time off list header.



8

Add the time off settings as desired. when complete press the create button.

The screenshot displays a time off management interface. At the top, there is a calendar view with a grid of days from 5/26/2025 to 11/17/2025. A modal form is open in the center, titled 'Employee ID' and 'Hours (per day)'. The form contains fields for 'Employee ID' (a dropdown menu), 'Hours (per day)' (a text input), 'Start Date' (a date picker showing 'mm/dd/yyyy'), and 'End Date' (a date picker showing 'mm/dd/yyyy'). A blue 'Create' button is located at the bottom of the modal. Below the calendar, there is a toolbar with buttons for 'Refresh', 'Add', 'Edit', and 'Delete'. Below the toolbar, there is a table with columns for 'Pool', 'Name', 'Hours (per day)', 'Start', and 'End'. The table is currently empty, displaying 'No data loaded' and a pagination control showing '1'.



Below shows how to edit a Time off record for capacity.

9

Click on your desired record from the time off list.



10

Click the "Edit" button located in the time off list header.



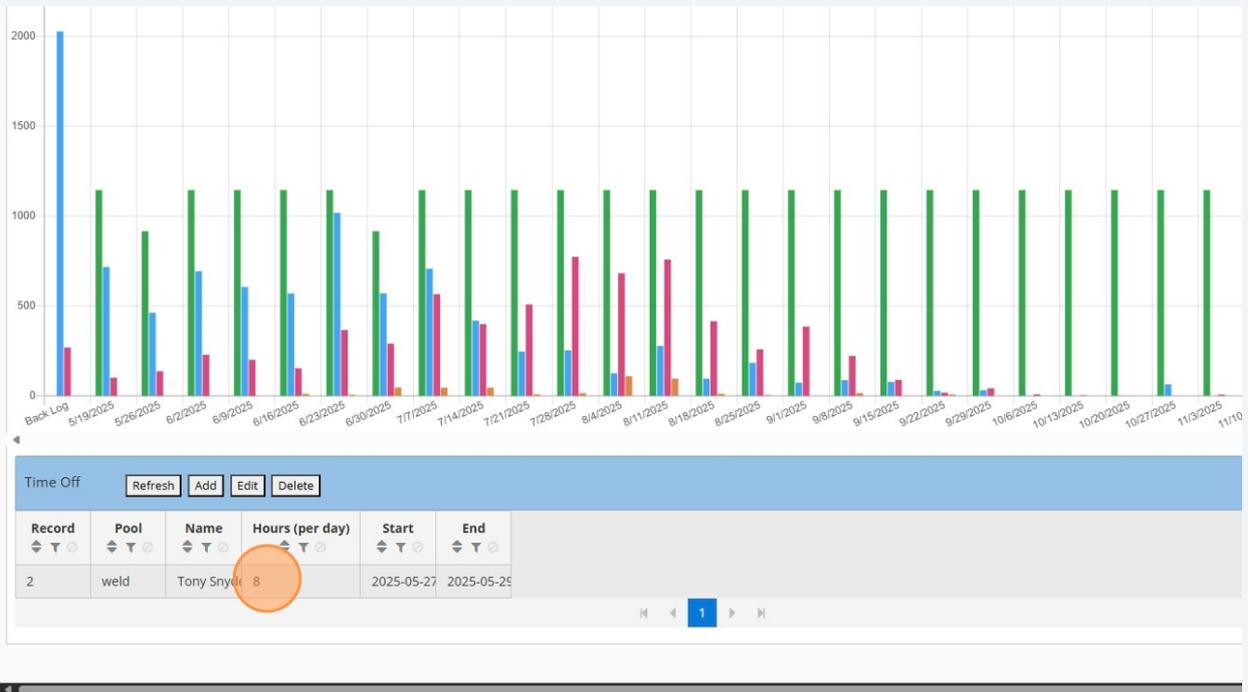
11 Edit the form as desired and click the "Update" button.

The screenshot displays a time-off management interface. At the top, a bar chart shows time-off records for an employee, with bars representing hours per day. Below the chart is a table with columns: Pool, Name, Hours (per day), Start, and End. A modal form is open in the center, allowing for editing a record. The form fields are: Employee ID (1017), Hours (per day) (8), Start Date (05/27/2025), and End Date (05/29/2025). An orange circle highlights the 'Update' button in the modal. Below the table, there are navigation controls including 'Refresh', 'Add', 'Edit', and 'Delete' buttons, and a pagination indicator showing '1'.

Pool	Name	Hours (per day)	Start	End
weld	Tony Snyder	8	2025-05-27	2025-05-29

 The following shows how to delete a time off record.

12 Click on your desired time off record from the time off list.



13 Click the "Delete" button in the time off list header.



14 Confirm your deletion by clicking the "Yes" button.

The screenshot displays a time-off management interface. At the top, a bar chart shows time-off entries for a user named Tony Snyder from May 2025 to November 2025. The chart uses green bars for standard time-off and red bars for other types. A confirmation dialog box is overlaid on the chart, asking "Delete time off entry?". The dialog has a close button (X) in the top right, a "Yes" button with a checkmark, and a "Cancel" button with an X. Below the chart is a toolbar with "Refresh", "Add", "Edit", and "Delete" buttons. At the bottom, a table lists the time-off entries:

Name	Hours (per day)	Start	End
Tony Snyder	8	2025-05-27	2025-05-29

Navigation arrows and a page number "1" are visible at the bottom of the interface.