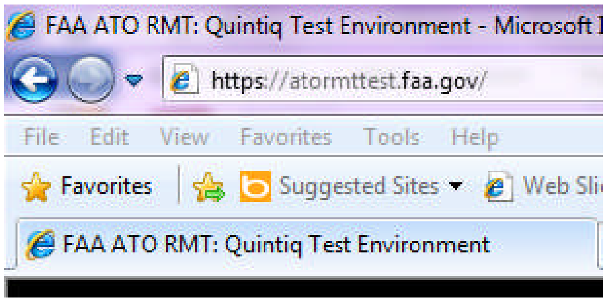
Air Traffic Organization Operational Scheduling and Planning (OPAS)

CPC Training Guide

Operational Planning and Scheduling

System Startup and Login

To start the Air Traffic Organization Operational Planning and Scheduling (OPAS) scheduling application, go to https://www.atormttest.faa.gov/. When the application starts, a login screen will appear pre-populated with your Windows login name, the project and the login service. Your username / password will be your LDAP username and password.



Application Flow

The major functionalities in the application are split into long-term (typically yearly), short-term, and day-of operations functionality. A typical workflow (from top-to-bottom and left-to-right) is the following:

Normally, the functionalities have to be executed in order, meaning that the long-term planning has to be finished before the short-term can be started, and short-term planning has to be completed before day-of planning can begin. Long-term planning happens once a year (planning for the next year); short-term planning (schedule generation) generally happens one time per pay period; the day-of planning occurs on a daily basis (schedule is adjusted to account for last minute leave and other changes). Please note that the application is role based and controllers are only responsible for certain actions within the system. The majority of the above actions are the responsibility of those creating the schedules.

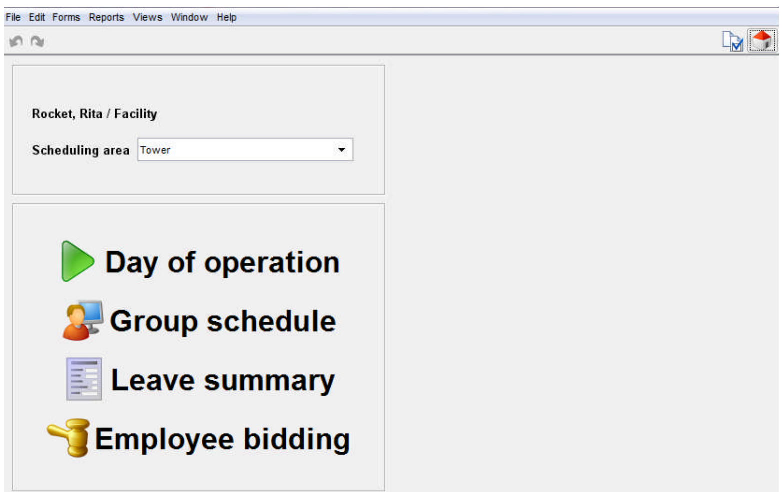
Images and Color Coding

The application annotates the schedule automatically through icons and colors that indicate specific situations. In each view, the legend provides additional information about the meaning of each color and icon. To view the legend, click on the button.

Operational Planning and Scheduling

Navigation

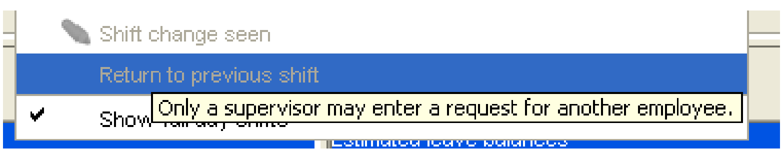
The home screen provides quick and direct navigation to the most important views for both employees and supervisors. Additionally, the home screen displays information about the logged in user and the currently selected scheduling area. Clicking on the navigation buttons takes you to the appropriate view. You can return to the home screen at any point by clicking the home icon in the upper right corner of the application or pressing the F12 key.



Feedback – Business Rules

OPAS checks all applicable business rules and constraints each time a user attempts to perform an action in the user interface. Certain scheduling options are disabled when they would violate business rules or the user does not have the correct authorization to perform the action. In any context menu, scheduling options that are disabled will be grayed out.

Anytime you find that an option is not available in the application or that an action cannot be performed, OPAS provides explanatory feedback in the form of a tooltip. Hover your mouse over the grayed-out option to view a quick explanation of why the action cannot be performed currently.



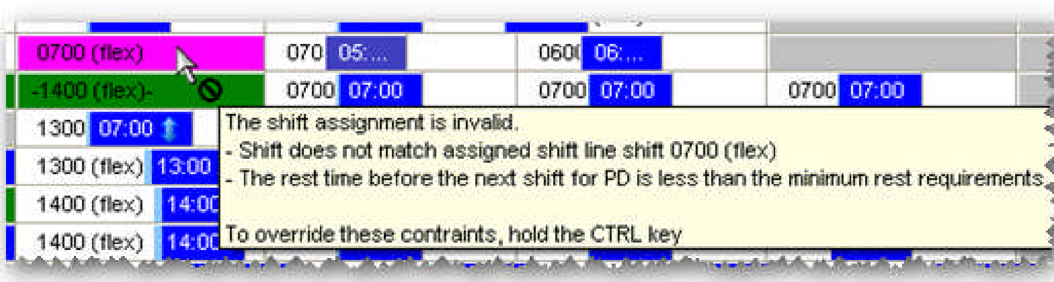
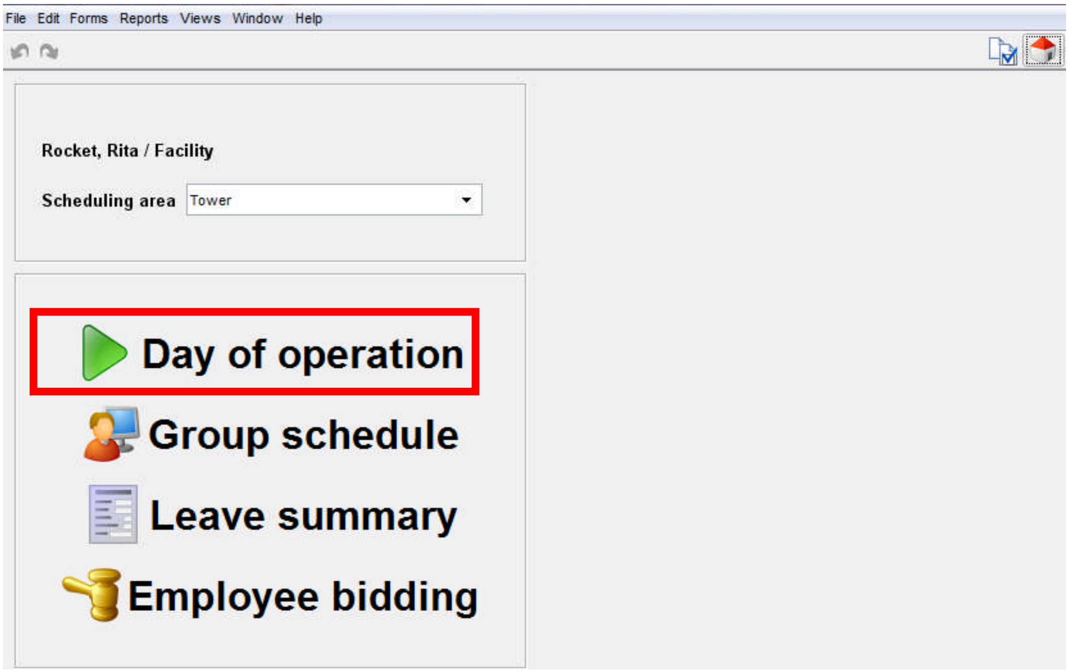


Table of Contents

1 Day of Operations

Home Screen



This module covers the following functions:

1.1 Shift Assignments
1.2 Requests
1.3 Employee Activities

Click the **Day of operation** button and let's get started!!

1.1 Shift Assignments

1.1.1 View current shift assignments

There are two different ways in which a controller can view their schedule and shift assignments:

1. From the home screen, open the **Day of Operations** view.
    a. On the **Schedule overview** tab, supply and demand (employees assigned to required shifts) are displayed on the left-hand side of the screen in the **Scheduled shifts** list and **Capacity chart**.
    b. The **Scheduled shifts** pane shows, for each start time, the set of employees assigned to work.
    c. In the **Scheduled shifts** pane, click on a *shift name* to display the details of that shift in the adjacent **Shift detail** pane (shift detail).
2. From the home screen open the **Group Schedule** view.
    a. This view breaks down each employee's day in a pay period and draws in the shifts that they will work.
    b. You cannot edit the schedule segment or make requests from this view.

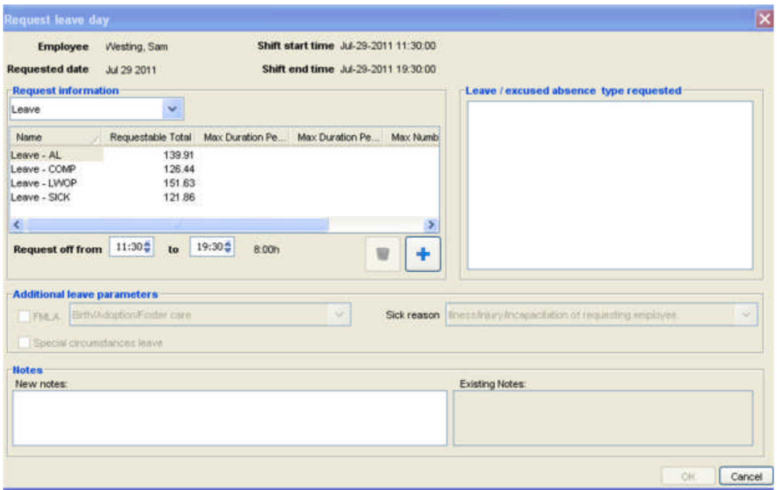
1.1.2 Print schedule reports

To print an individual schedule, this shows the schedule for an individual employee, right-click on your name in the Shift detail pane and selects the option to Export individual schedule. *Note you are only permitted to print your own individual schedule.

1. The **Save** dialog box prompts you to save the report to your local machine.
2. Enter a File name for the report.
3. Click *Save* to save the report in the desired location.
4. The report will open as an Excel document and is ready for printing.

1.2 Requests

1.2.1 Enter Leave / Excused Absence Request

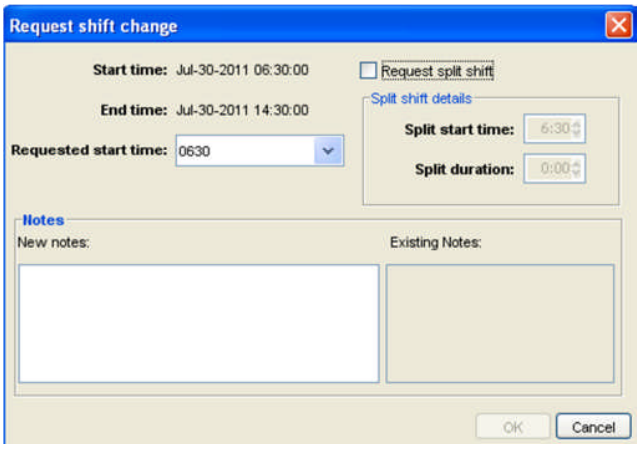


It is possible to create requests in the **Day of operation** view for yourself.

1. To create a leave / excused absence request, first select your shift in the **Scheduled Shifts pane**.
2. Next, right-click on your *shift* in the **shift detail** pane and select the option *New leave / absence request.*
3. In the dialog that opens, select the desired *type of leave and/or excused absence* from the **requested information** drop down menu
4. Select the detailed requestable types from the **Name** list below.
   a. Enter the *request off from and to time* for that type of leave (the request off times will be pre-populated with the shift start and end times of the shift selected).
   b. To add the request for that type of leave, click the *plus (+)* button.

   To request multiple leave types for the same shift, select the desired *type of leave and/or excused absence* from **the requested information** drop down menu
   a. Make sure that the times specified do not overlap with any other times in this leave request.
   b. Click the *plus (+)* button to add the request for a single type of leave.
5. Within the Additional leave parameters section (if applicable):
   a. Specify whether the leave request is FMLA related by checking the *FMLA* checkbox. If you choose this option, you must select a reason from the **FMLA** dropdown box.
   b. Specify whether the leave is *Special circumstances* by checking the checkbox. If this is selected, a note is required. Note: a request may not be considered both FMLA and Special circumstances at the same time.
   c. If sick leave is requested, select the associated *Sick* reason from the dropdown box.
   d. Add any applicable notes.
6. If the leave balance is insufficient, OPAS will display a warning box letting you know of this. Press the *OK* button in the warning dialog to proceed with making the request.
7. Click *OK* to exit the dialog and submit the request.
8. A pending request will be displayed in the **open requests** pane in the right-hand side.

1.2.2 Create a shift change request



1. To create a shift change request, first select your shift in the **Scheduled Shifts pane**.
2. Next, right-click on a *shift* in **the shift detail** pane and select the option *New shift change request*.
3. In the dialog that opens, selected the *start time* you would like to change to from the **Request Start Time** drop down.
4. A split shift is a shift that contains a time period where the controller is not working. If the request is for a split shift,
    a. Check the checkbox to request a split shift
    b. Enter the *split start time* and the *split duration*
5. Enter any *notes or comments* if desired.
6. Click *OK* to exit the dialog and submit the request.
7. The pending request will be displayed in the **open requests** pane in the right-hand side.

1.2.3 Create an other duties request

1. To create an other duties request, first select your shift in the **Scheduled Shifts pane.**
2. Next, right-click on a *shift* in the **shift details** pane and select the option *New other duties request.*
3. No dialog will open, the application will automatically create a pending other duties request for the selected shift.
4. The pending request will be displayed in the **open requests** pane in the right-hand side.

1.2.4 Create a shift swap request

1. To create a shift swap request, first select the desired shift in the **Scheduled Shifts pane.**
2. Next, right-click on the *shift* of the employee you'd like to exchange with and select the option to *new shift swap request.*
3. No dialog will open; the application will automatically create a pending shift swap request.
4. The pending request will be displayed in the **open requests** pane in the right-hand side.

1.2.5 Create a multiple action request

Multiple action requests are a special type of request that allow an employee to enter a free-format request.

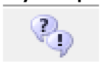
1. To create a multiple action request, first select your shift in the **Scheduled Shifts pane.**
2. Next, right-click on a *shift* in **the shift details** pane and select the option *New multiple action request.*
3. In the dialog that opens, select any *additional employees* to be included in the request from the pane on

the left and add them to the pane on the right by clicking the *arrow button*.

4. In the **Notes** pane, very clearly and descriptively describe the request and the desired outcome(s). This request will eventually be manually acted upon by a supervisor, so a high level of detail is necessary in the description.
5. After pressing the *OK* button, the application will create a pending multiple action request.
6. The pending request will be displayed in the **open requests** pane in the right-hand side.

1.2.6 Accept / Decline Shift Swap Requests

If another employee requests to swap a shift with you, there are two ways that you could accept or deny the request. The first option is from any screen within OPAS:

1. If you have any requests to act upon, on the top **navigation bar** click the *Pending Requests* icon that looks like: 
2. Right-click on a *request* in the **Employee requests** dialog and select the option to *accept/decline* the request.
3. In the dialog that opens, review the details of the request. Click *Accept* to approve the request, *Decline* to deny it, or *Cancel* to exit without any official action.

The other way to Accept/ Decline is:

1. Right-click on a *request* in the **Open requests** pane and select the option to *accept/decline* the request.
2. In the dialog that opens, review the details of the request. Click *Accept* to approve the request, *Decline* to deny it, or *Cancel* to exit without any official action.

1.3 Employee activities

The **Employee Activities** tab gives the user more details related to the selected shift, day, and employees. To begin, click the **Day of Operations** button on the **Home Page** and select the **Employee Activities** tab at the top left of the screen.

1.3.1 Briefing periods

This panel displays a list of all employees assigned a briefing period on the selected day.

1.3.2 Regular days off

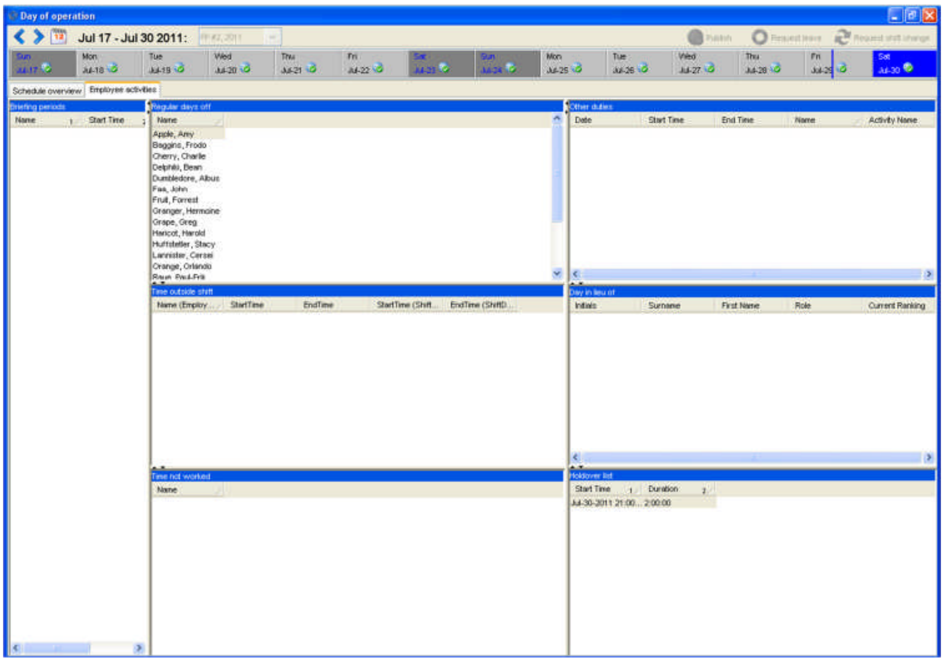
This panel displays a list of all employees with regular days off for the selected day.

1.3.3 Time outside shift (overtime)

This panel displays a list of employees who are assigned to work time outside of their assigned shift (i.e., overtime) on the selected day.

1.3.4 Time not worked (leave)

This panel displays a list of employees who have leave or other absences scheduled for the selected day.



1.3.5 Other duties (non-coverage activities)

This panel displays a list of employees who have been assigned other duties on the selected day.

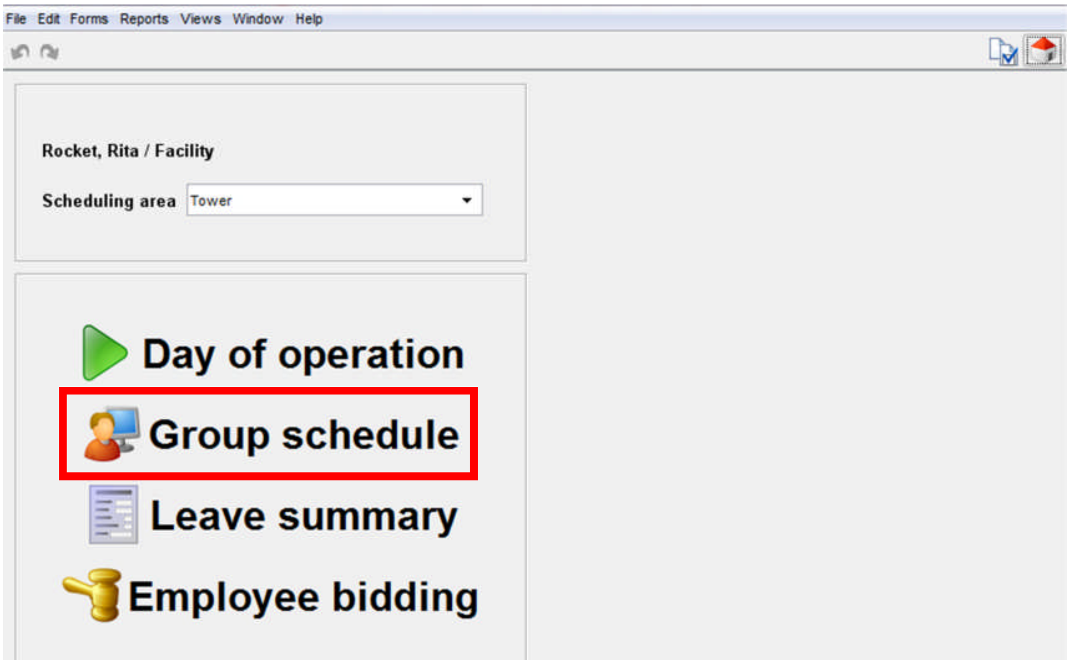
1.3.6 Day in lieu of

This panel displays a list of all employees who are receiving their day in lieu on the selected day.

1.3.7 Holdover list

The holdover list provides the scheduler with a list of employees, in ranked order, that are available to work a pre-determined increment of time.

2 Group Schedule
Home Screen



This module covers the following functions:

2.1 Group Schedule

Click the **Group Schedule** button and let's get started!!

2.1 GROUP SCHEDULE

The **Group Schedule** page provides a higher level view of your past, present, and future schedules. To begin, click on the **Group Schedule** Icon from the **Home Page.**

2.1.1 *Group Schedule*

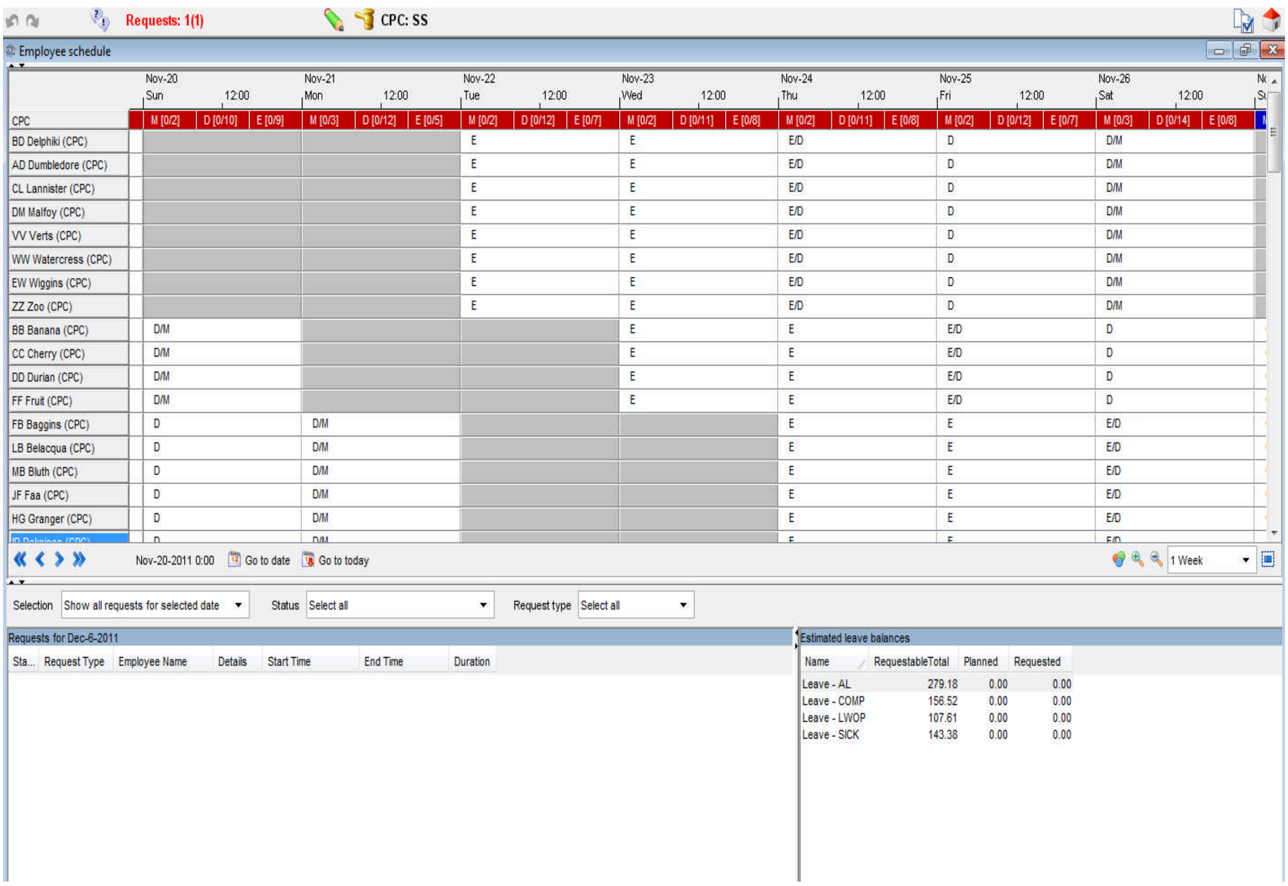
This panel displays a list of all employees and their assigned shifts throughout the given published schedule.

2.1.2 *Requests*

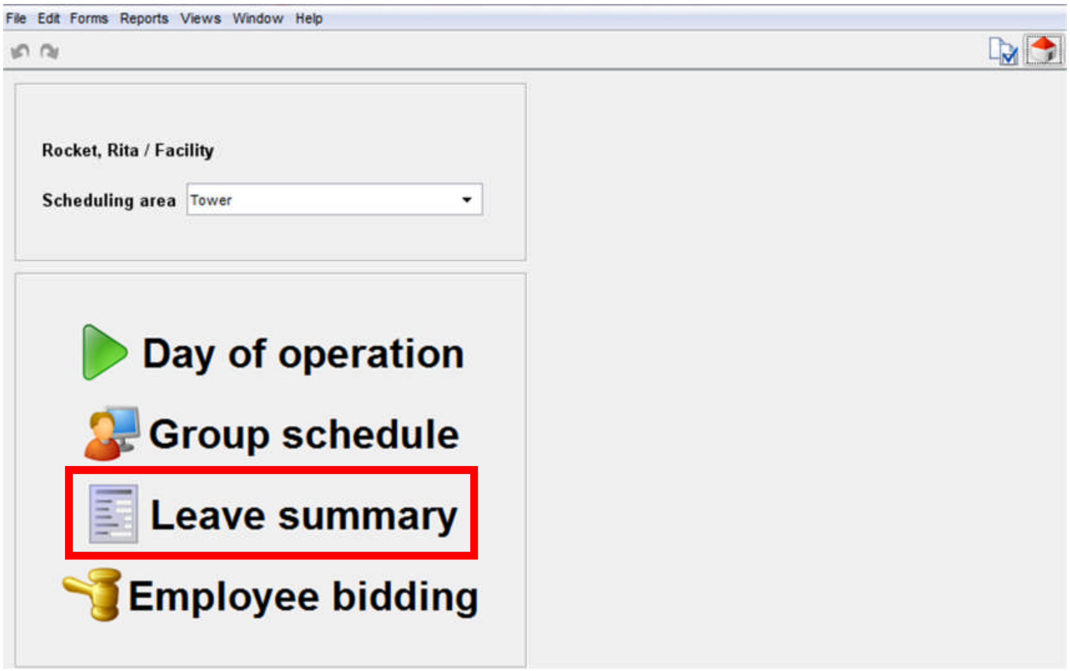
This panel displays a list of all requests you have made. Above the list of requests, options to filter the list based on Pending / Approved / Denied are available.

2.1.3 *Estimated Leave Balance*

This panel displays a list the various types of leave and your current available balance.



3 Leave Summary
Home Screen



This module covers the following functions:

3.1 Leave Summary

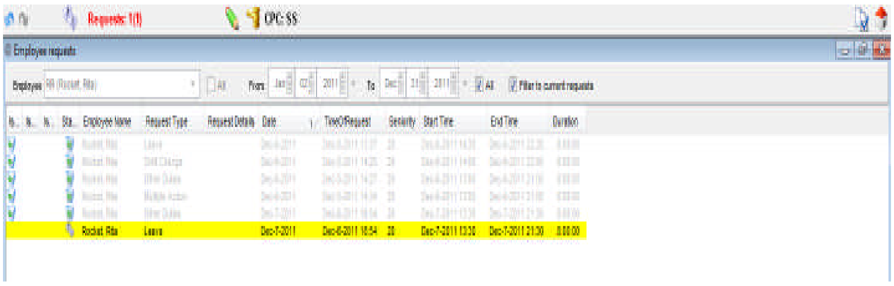
Click the **Leave Summary** button and let's get started!!

3.1 Leave Summary

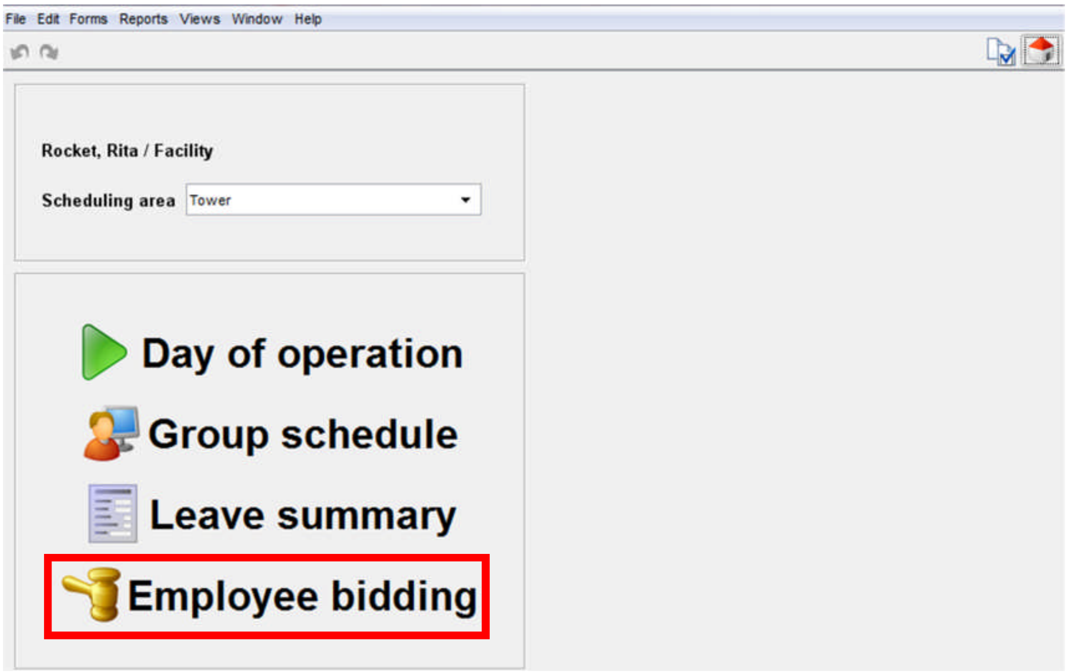
The **Leave Summary** page provides more details related to your current leave requests. To begin, click the **Leave Summary** icon on the **Home Page**.

3.1.1 Leave Summary Page

This panel displays a list of all days off and pending requests for the year to date.



4 Conduct Bidding
Home Screen



This module covers the following functions:

4.1 Controller Bidding

Click the **Employee bidding** button and let's get started!!

4.1 Controller Bidding

The **Employee Bidding** page allows you to place bids for shift lines, primetime leave, and non-primetime leave. To begin, click the **Employee Bidding** icon on the **Home Page**.

4.1.1 Open bid window

1. OPAS will alert you when it is your turn to bid. When it is your turn, either click on the bidding gavel icon in the toolbar of OPAS or click on the Employee Bidding button.
2. In order to officially open your bid window, press the 'Start bidding' button.

4.1.2 Bid Shift Line

After you have clicked 'Start bidding,' OPAS will prompt you to select a shift line.

1. In the **Select RDOs** tab, navigate to the **Crews** pane and select the RDO combination you would prefer by clicking on it.
2. Based on the RDO selection, the available shift lines will appear in the **Shift Lines** pane. Select the desired line by clicking on the checkbox coinciding with it.

NOTE: Any previously assigned shift lines will be grayed out and will display the corresponding employee working that shift line. You will not be able to select a shift line .that already has an employee assigned to it.

4.1.3 Bid Primetime

After you have selected a shift line to work, you will be able to bid leave. The following steps detail how primetime bidding works; your bid round order may be slightly different depending on your facility's bidding processes.

1. Primetime bidding can either be done within the **Leave Bidding – Expanded** or **Leave Bidding – Compressed** view.
2. Click on the slots that you would like to take off within the primetime period(s). Days that do not allow you to click on are either full or not part of the primetime period(s). When a day is selected it will turn green.
3. OPAS will ensure that no primetime bidding rules are broken while you input your bids. If any rule is broken, OPAS will display a red text warning at the top of the bidding form describing what rule is being broken.
4. Upon completion of primetime bidding, click **Submit** at the top of the screen.
5. A dialog box will appear asking **Are you sure you want to submit this bid?** Click **Yes**.

Note: depending on your facility's bidding processes, your primetime bid round may have a waitlist associated with it. This means that although a day's bid slots may be completely filled, you may add yourself to a waiting list to receive this bid slot on which your supervisor will eventually rule. To add yourself to a waitlist, click on the Day that is associated with the bid slot you'd like. With the waitlist allowed, the slot will turn purple and display a clock icon to indicate you're now on the wait list. To remove yourself from the waitlist, simply click the purple Day again and it will turn white again.

4.1.4 Bid Shift Line +Primetime

Sometimes the shift line bid round and the primetime bid round will be combined into one joint bid round. If this is the case, you will select your shift line and primetime bids the same as always, but must make sure to select a shift line before attempting to bid leave.

1. In the **Select RDOs** tab, navigate to the **Crews** pane and select the RDO combination you would prefer by clicking on it.
2. Based on the RDO selection, the available shift lines will appear in the **Shift Lines** pane. Select the desired line by clicking on the checkbox coinciding with it.
3. Note: Any previously assigned shift lines will be grayed out and will display the corresponding employee working that shift line. You will not be able to select a shift line that already has an employee assigned to it.
4. After your shift line has been selected, primetime bidding can either be done within the **Leave Bidding – Expanded** or **Leave Bidding – Compressed** view.
5. Click on the slots that you would like to take off within the primetime period(s). Days that do not allow you to click on are either full or not part of the primetime period(s). When a day is selected it will turn green.
6. OPAS will ensure that no primetime bidding rules are broken while you input your bids. If any rule is broken, OPAS will display a red text warning at the top of the bidding form describing what rule is being broken.
7. Upon completion of primetime bidding, click **Submit** at the top of the screen.
8. A dialog box will appear asking **Are you sure you want to submit this bid?** Click **Yes.**

> Note: depending on your facility's bidding processes, your primetime bid round may have a waitlist associated with it. This means that although a day's bid slots may be completely filled, you may add yourself to a waiting list to receive this bid slot on which your supervisor will eventually rule. To add yourself to a waitlist, click on the Day that is associated with the bid slot you'd like. With the waitlist allowed, the slot will turn purple and display a clock icon to indicate you're now on the wait list. To remove yourself from the waitlist, simply click the purple Day again and it will turn white again.

4.1.5 Bid Non-primetime

After you have selected a shift line to work, you will be able to bid leave. The following steps detail how non-primetime bidding works; your bid round order may be slightly different depending on your facility's bidding processes.

1. Non-Primetime bidding can either be done within the **Leave Bidding – Expanded** or **Leave Bidding – Compressed** view.
2. Click on the slots that you would like to take off within the non-primetime period(s). Days that do not allow you to click on are either full or not part of the non-primetime period(s). When a day is selected it will turn green.
3. OPAS will ensure that no bidding rules are broken while you input your bids. If any rule is broken, OPAS will display a red text warning at the top of the bidding form describing what rule is being broken.

> Note: depending on your facility's bidding processes, your non-primetime bid round may have a waitlist associated with it. This means that although a day's bid slots may be completely filled, you may add yourself to a waiting list to receive this bid slot on which your supervisor will eventually rule. To add yourself to a waitlist, click on the Day that is associated with the bid slot you'd like. With the waitlist allowed, the slot will turn purple and display a clock icon to indicate you're now on the wait list. To remove yourself from the waitlist, simply click the purple Day again and it will turn white again.

4. Upon completion of non-primetime bidding, click **Submit** at the top of the screen.
5. A dialog box will appear asking **Are you sure you want to submit this bid?** Click **Yes**.

4.1.6 Free-for-all bidding

Free-for-all bidding is only allowed in automatic employee bidding. During a pre-determined start and end time, all employees will be able to open their bid window and enter bids.

4.1.7 Bid later

Sometimes employees will wish to skip their current bidding opportunity to bid later. If this is the case, in any bid round you can press the 'Bid later' button in order to indicate this. Supervisors will be able to manually re-open your bid window later on for you to complete your bidding. Once you finally complete your bid, please click the Submit button to officially submit your bids.

Note: if you choose to bid later on a shift line round, you will not be able to place leave bids until you actually submit your shift line bid.

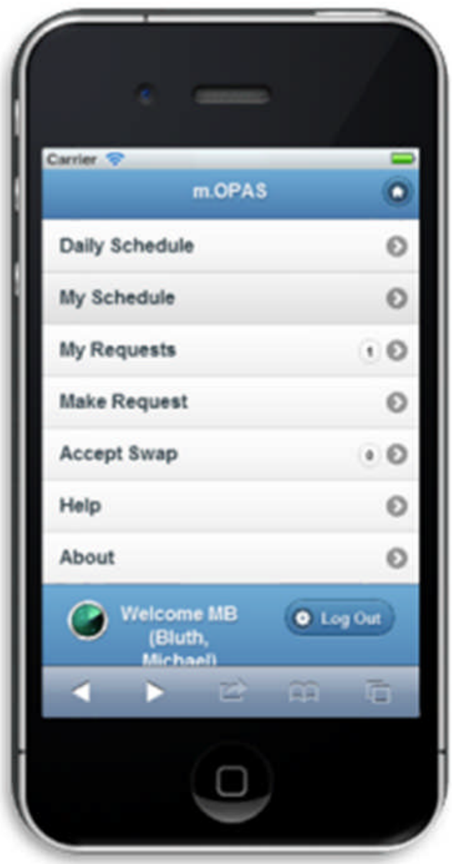
4.1.8 Decline bidding

Sometimes employees will wish to decline their bidding round entirely. If this is the case, in any bid round you can press the 'Decline bidding' button in order to indicate this.

Note: once the option 'Decline bidding' option is selected, the supervisor will not be able to manually re-open your bid round.

Note: you are not allowed to decline bidding on a bid round that involves selecting a shift line (either a shift line bid round or a shift line + primetime bid round).

5 m.OPAS
Home Screen



This module covers the following functions:

5.1 General Navigation

5.2 Functional Instructions

5.1 General Navigation

The m.OPAS tool is a mobile web application that was developed to provide access to the major controller functions within OPAS. It will allow users to view the daily schedule, their requests and shifts, and submit requests. It is optimized for mobile browsing but can be accessed on most operating systems and browsers. See the Table to the right for a list of devices that are officially supported. Keep in mind that other devices may be supported, but have not been tested as part of the formal quality assurance program. Only users who are scheduled with the tool will have access to m.OPAS. For complex or supervisor functions not available on the mobile site please use the main OPAS tool available at https://www.atormttest.faa.gov.

Approved Devices
iOS 4+ Phones
iPhone 4S
iPhone 4
iPhone 3GS
iOS 4+ Tablet
iPad 1
iPad 2
Android 2.2+ Phones
Galaxy Nexus
Motorola Droid
Droid X
Droid 2 Global
HTC EVO
Samsung Captivate
Android 3.1 Tablet
Samsung Galaxy Tab 10.1
Windows XP, 7
Google Chrome
IE 8+
Firefox
Safari
OSX
Safari
Google Chrome

5.1.1 Navigation

The tool can be accessed on smartphones, tablets, laptops, and desktops. Depending on the device a user will either be using a mouse, touch pad, or touch screen. Clicking or touching items will open them.

Due to the sensitivity of touch screens, all actions that would impact a schedule have confirmation screens associated with them. This includes making, deleting, and cancelling requests. While it does add an additional step to these functions it will reduce the likelihood of accidental clicks.

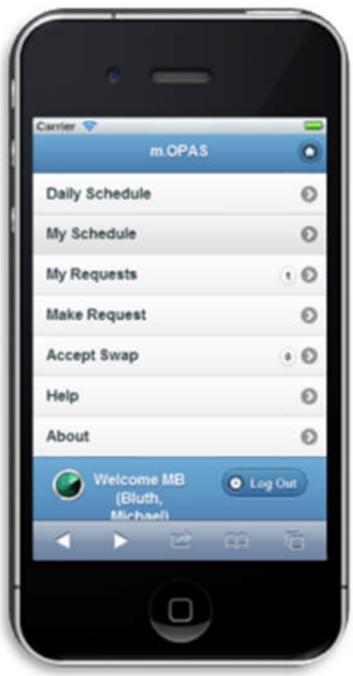
A Home button is provided in the top right of every screen. This will allow users to return to the main screen at any time.

User may also select the m.OPAS icon at the bottom left of every screen to return to the main screen.

A Log Out button is located in the bottom right of every screen. This will allow users to log out of the web application from any screen.

5.1.2 Login

1. Using a supported internet browser or mobile device, navigate to https://www.atormttest.faa.gov/mopas to launch the application.
2. Enter your NexGen user name and password and select the *Log On* button.
3. You will be automatically launched to the m.OPAS homepage.

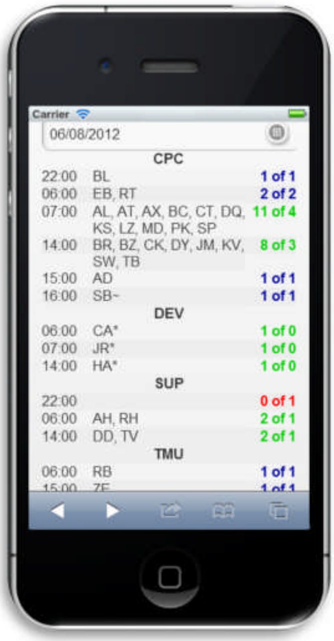


5.1.3 Home

From the home screen users will be able to navigate to the Daily Schedule, My Schedule, My Requests, Make Requests, Accept Swap, Help, and About screens. Users will also be able to Log Out of the tool.

5.2 Functional Instructions

5.2.1 Daily Schedule



1. From the Homepage, navigate to the Daily Schedule screen by selecting it.
2. The current day's daily schedule will be shown.
3. If you would like to view the daily schedule for another day, select the *calendar icon/date selector* button along the top of the screen and choose the day you would like to view.
    a. If the day has a published schedule for it, then the shifts and employees will be shown
    b. If the day does not yet have a published schedule for it, then the message "Unable to display Daily Schedule, you have no schedule published for the selected date" will be displayed.
4. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.2 My Schedule

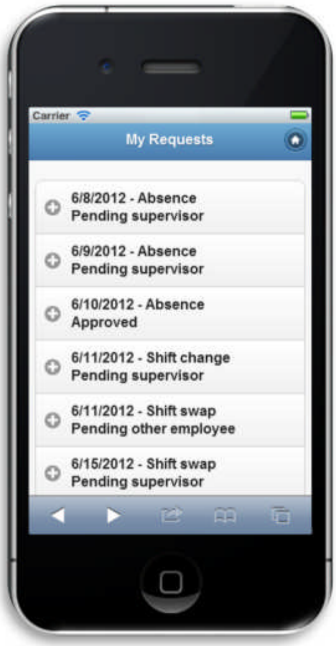
1. From the Homepage navigate to the My Schedule screen by selecting it.
2. Your schedule for today and every day in the future that has been published will be viewable.
3. To view days in the future, scroll down. You can scroll until there are no longer any published shifts. New shifts will appear as they are published.
4. To view more information and options for a shift, select the plus icon. A menu will expand to provide shift details including start time, end time, and shift type.
5. If you would like to submit a request for the shift, select the request type displayed below the shift information. For steps on submitting the request see section 5.2.4.
6. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.3 My Requests

1. From the Homepage navigate to the My Requests screen by selecting it.
2. The count bubble located next to the arrow indicates the number of requests you have in the system.
3. A list of all requests that you have entered will populate. Only requests relevant for current and future days will be visible.
4. Selecting a request will display additional information about it. This will include shift information, request type, notes entered with the request, who and when it was acted on (if applicable), and any available actions that can be performed on the request.
5. All requests that are awaiting action by a supervisor will be listed as "Pending supervisor".
6. To delete a pending request, select the request to expand it and select the *Delete* button on the bottom of the request information.
    a. A confirmation dialog will open and you will be directed to confirm your decision to delete the request.
    b. By selecting "Yes, Proceed" the request will be removed from the system

c. By selecting "Cancel" nothing will change within the system and the request will still be in your My Requests view.

7. All requests that have been approved by a supervisor will be listed as "Approved".
8. To cancel an "Approved" request, select the request to expand it and select the *Request Cancellation* button on the bottom of the request information.
   a. A confirmation dialog will open and you will be directed to confirm your decision to cancel the request.
   b. By selecting "Yes, Proceed" a cancellation request will be created and listed below the previously approved request.
   c. By selecting "Cancel" nothing will change within the system and the request will still be in your My Requests view.
9. A swap request that you initiated will be listed as "Pending other employee" until the second employee has Accepted or Rejected the request. This request can be deleted.
   a. If the second employee accepts the swap, the status will be listed as "Pending supervisor". This request can be deleted.
   b. If the second employee rejects the swap, the status will be listed as "Rejected by second employee". This request can be deleted.

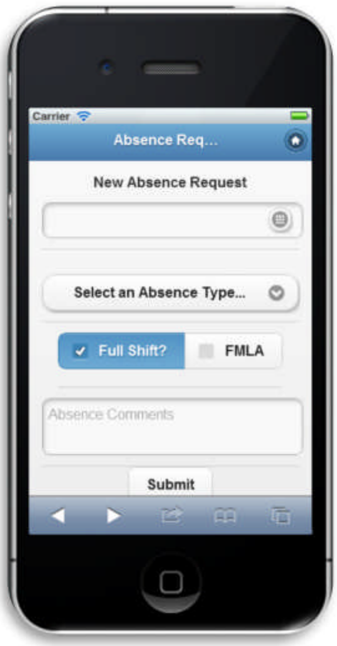


10. A swap request that is made to you by another employee will be listed as "Pending approval by me"
    a. If you accept the swap, the status will be listed as "Pending supervisor". This request can be changed to "Rejected" any time prior to supervisor approval. It can be deleted by the other employee.
    b. If you reject the swap, the status will be listed as "Rejected by me". This request can be changed to "Accepted" any time prior to the other employee deleting it.
11. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.4 Make Requests

5.2.4.1 Absence Request

1. From the Homepage, begin to make an absence request by selecting the Make Requests option.
2. In the Make Requests screen, select Absence Request.
3. Select the date that for which the request will be for, by selecting the *calendar icon/date selector* button and choosing the appropriate date.
   NOTE: Users will be unable to select days in the past
4. In the "Select an Absence Type" drop down, select the type of leave you would like to request.
5. If you have selected Sick Leave you must select a reason. Use the drop down menu to identify the reason.
6. Once the absence type is established, use the check box to annotate if the request is for an entire shift.
7. If the check box is de-selected, a menu will appear to enter the start and end time of the request.



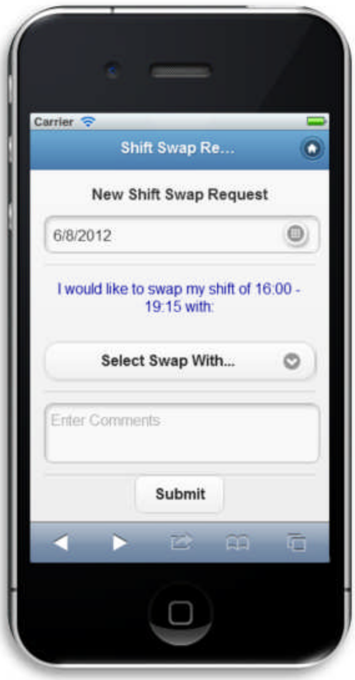
8. Enter in the appropriate start and end time for the request.
9. If you would like to invoke FMLA with the request, select the checkbox to activate it.
10. If this checkbox is selected, you must choose an FMLA request reason from the drop down that appears.
11. Enter any comments you would like to have associated with the request.
12. When the request looks as desired, select Submit, then select "Yes, proceed" in the confirmation popup that appears.
13. If there are any errors or restrictions on the request a message will appear below the Submit button identifying why the request is invalid. Fix any errors and resubmit the request.
14. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.4.2 Shift Change

1. From the Homepage, begin by selecting the Make Requests option.
2. In the Make Requests screen, select Shift Change.
3. Select the date from the calendar for which the request will be for by choosing the appropriate date. NOTE: Users will be unable to select days in the past
4. Next, select the new start time you would like to be changed to using the time selector and select "Set Time".
5. Enter any applicable notes in the free text box.
6. When the request looks as desired, select Submit, then select "Yes, proceed" in the confirmation popup that appears.
7. If there are any errors or restrictions on the request a message will appear below the Submit button identifying why the request is invalid. Fix any errors and resubmit the request.
8. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.4.3 Shift Swap

1. From the Homepage select the Make Requests option.
2. In the requests menu, select the Shift Swap option to enter a swap request.
3. First, select the date that you would like the request for by selecting the date selector button and choosing the appropriate date.
4. Next, select the employee you would like to swap with by choosing the desired shift from the Select Swap With… drop down.
5. Enter any applicable notes within the Enter Comments text box.
6. When the request looks as desired, select Submit, then select "Yes, proceed" in the confirmation popup that appears.
7. If there are any errors or restrictions on the request a message will appear below the Submit button identifying why the request is invalid. Fix any errors and resubmit the request.
8. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.



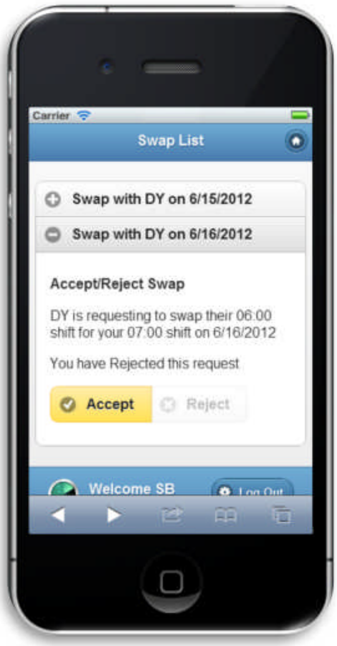
5.2.4.4 Multiple Action

1. From the Homepage select the Make Requests option.
2. In the requests menu, select the Multi Action option to enter a

multiple action request.
3. First, select the date for which you would like to make the request by selecting the date selector button and choosing the appropriate date.
4. In the Multi Action Details text box, very clearly and descriptively describe the involved employees, the request and the desired outcome(s). This request will be manually acted upon by a supervisor, so a high level of detail is necessary in the description.
5. When the request looks as desired, select Submit, then select "Yes, proceed" in the confirmation popup that appears.
6. If there are any errors or restrictions on the request a message will appear below the Submit button identifying why the request is invalid. Fix any errors and resubmit the request.
7. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.5 Accept Swap

This form allows a user to act on swap requests made by other employees who would like to swap shifts with them. Swaps can also be acted on in the My Requests screen. This form will allow users to quickly and easily see the swaps that have been requested of them.



1. To view and act on a pending shift swap, from the Homepage, select the option Accept Swap.
2. If there are no pending swaps, the count bubble on the Homepage will show "0" and a message indicating that no request were found will be displayed in the Swap List.
3. The Swap List page will open with a list of all offered shift swaps and their corresponding dates. To view more information on a swap request or act on it, select the request.
4. The request expands to show the Accept / Reject detail. From here you can review all of the information involved with the swap and either Accept or Reject the request.
   a. To Accept:
      i. Select the *Accept* button
      ii. A popup will appear to confirm the selection. Select "Yes, Proceed".
      iii. The request will be sent to the supervisors for approval.
      iv. The user can change their mind and reject the swap until the request is in the past, the supervisor acts on the request, or the requesting employee deletes the swap.
   b. To Reject:
      i. Select the *Reject* button
      ii. A popup will appear to confirm the selection. Select "Yes, Proceed".
      iii. The requesting employee will be notified that the request was rejected.
      iv. The user can change their mind and accept the swap until the request is in the past or the requesting employee deletes the swap.
5. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.6 View Bidding Status

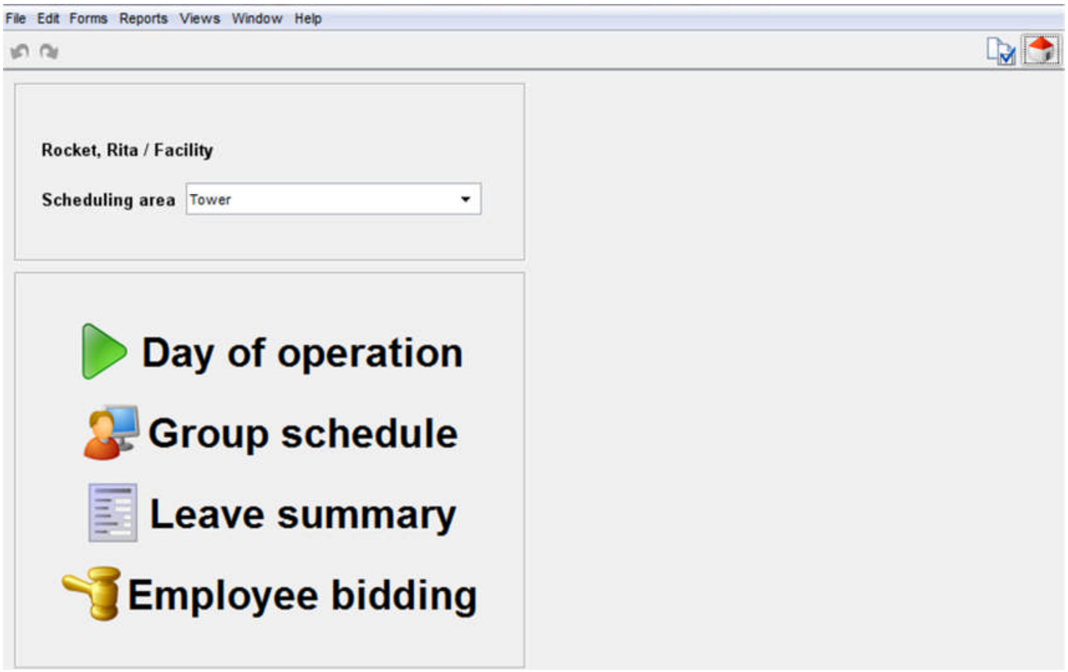
This form will only be populated with data during the bidding process. All other times of the year it will contain no information.

1. Bidding Status can be viewed by selecting the Bidding Status option on the Homepage.
2. The bid schedule will populate in order from who is currently able to bid as well as who is next in order to bid.
3. To return to the Homepage, select the home icon in the top right or the m.OPAS icon on the bottom left.

5.2.7 Help

The Help screen provides more information on the functions and provides the contact information for the ATO m.OPAS Program Management Office and support line.

5 Appendix
Home Screen



This section contains the following:

- 5.1 Glossary
- 5.2 Frequently Asked Questions

5.1 GLOSSARY

The following is a comprehensive list of terms that are commonly used within OPAS and OPAS related training materials.

Bid schedule	Defines the structure of the bidding process. It can be set up with any number of bid rounds (minimum of one) with each bid round for a specific type of bidding (e.g., shift lines, primetime leave, other leave).
Bid window	Assigned time for an employee to create and submit his / her bids for shift lines, primetime leave and other leave opportunities.
Certified Professional Controller (CPC):	Fully qualified employee who can provide coverage for all sectors (positions).
Compressed Work Schedule (CWS)	Schedule in which an employee works 4 10-hour shifts per week in order to meet the basic work requirements (40 hours per week).
Crew	Group of employees, within a working group, that has the same RDOs.
Developmental	Less-than-fully qualified employee who can only provide coverage for specific sectors (positions).
Excused absence	Absence from duty and duty station without affecting the employee's leave, pay, or benefits.
Facility	Unit level that is scheduled in the OPAS.
Family Medical Leave Act (FMLA)	Type of leave which allows employees to take time off (vacation, sick, leave without pay, etc.) under the FMLA for a variety of reasons.
In Lieu of Holiday	Day off provided to employees who work on a designated federal holiday.

Leave Balance	The amount of time that is remaining on an employee's annual time off allotment.
Leave Without Pay (LWOP)	Type of leave taken by an employee for which they do not receive pay.
Multiple Action Request	Multiple action requests are a special type of request that allow an employee to enter a free-format request. This is commonly used for things like a three way swap. Any type of request that is not directly available in OPAS should be entered through multiple action requests.
Other Duties Request	Request made to come into work and do something other than standard coverage. This request is mostly either developmental or training.
Other leave	Leave requested by employees outside of the designated primetime period.
Primetime leave	Period of time, in the year plan, during which employees are ensured a minimum of two consecutive or non-consecutive weeks of leave.
Shift line	Actual weekdays for the RDOs, as well as how one or many work patterns repeat throughout the year.
Shift Swap	Exchanging shifts with another employee.
Time On Position (TOP)	Portion of an employee's shift when they are actively monitoring the airspace.

5.2 Frequently Asked Questions

The following list is common questions that you may come across while navigating the system.

5.2.1 Leave

1. **How far out can I enter a request? Will the supervisor be able to see it?**
    a. The group schedule can be used to view and enter requests for both published days and days in the future. The allowed time frame for requests is determined at the local level, and will be restricted on a facility by facility basis.
2. **How are leave requests ranked? (i.e., how does the supervisor know which request to approve / deny first?)**
    a. Leave requests are ranked based on facility specific parameters (either based on time of request or seniority). These parameters are configurable by type of request at the local level. Leave requests always appear in the application in the order in which they should be acted on. If the supervisor attempts to rule on a request out of turn, then they will see a warning indicating that they may be breaking a business rule.
3. **Can my request be approved after it's been denied?**
    a. Yes, the decision on a request may be changed up until the request has passed. Any time a decision is made or updated on a request, the action is stored in the audit trail. The audit trail for a request may be reviewed by any supervisor or by the employee who entered the request.
4. **How can I enter a request for multiple types of leave?**
    a. In the leave request dialog, select the first type of leave (e.g., annual), and update the start / end time fields to be less than the duration of the shift (e.g., 9am - 12pm). Click the plus sign to add the annual times to the panel on the right. Then select another type of leave (e.g., sick), and update the start / end time fields to the desired duration (note: by default, they are set to be the rest of the shift). Click the plus sign to add the sick times to the panel on the right. Click OK to close the dialog and submit the request.
5. **How can I request a 3-way shift swap?**
    a. A three-way shift swap will be entered as a multiple action request. Multiple action requests act as a catchall that allows an employee to enter *any* type of request. This placeholder will be reviewed in turn by the supervisor. If approved, the changes will be implemented manually. In the multiple action request dialog, select the associated employees and enter a detailed note describing the request.

5.2.2 Overtime

1. **How is the sort order for the overtime list determined? Are there differences between call-in and holdover?**
    a. The overtime call list will be sorted first based on whether an employee is on the volunteer list, second based on their overtime counters, and third based on their seniority. The holdover list may be sorted differently - either based on holdover hours only or call-in hours only or the total of both.
2. **What counts against my offered hours counter?**
    a. When a supervisor calls you to offer you overtime, they will record the results of that call (voicemail, no answer, assigned / accepted, excused, declined). Depending on your locally negotiated rules, these different results will either charge you for the offered hours or not. One common example is that "excused" would not cause you to be charged for the hours where as "declined" would. The overtime calls report will show a summary of calls made and their status.
3. **Can I switch from the volunteer list to the non-volunteer list (and vice versa)? What impact does that have?**
    a. Yes. A manager or supervisor has the ability to update your overtime volunteer status. They will specify the effective date for that change, and enter a starting balance for the holdover and call-in overtime.

5.2.3 Reports

1. **How can I view requests that have been acted upon?**
    a. At the top of the screen you'll see an icon with "?/!" and a number next to it. This represents the number of requests that have been acted upon. You can mark these as "seen" which will remove them from the list.
2. **How can I view my move / shift counters?**
    a. From the reports menu, select the move count or shift count report.
3. **How can I see a record of all changes to my shift?**
    a. All actions and changes to a published shift are recorded in the audit trail. Each audit trail record includes the name of the person, who made the change, the time at which it was entered, and a reason or additional notes (where applicable).