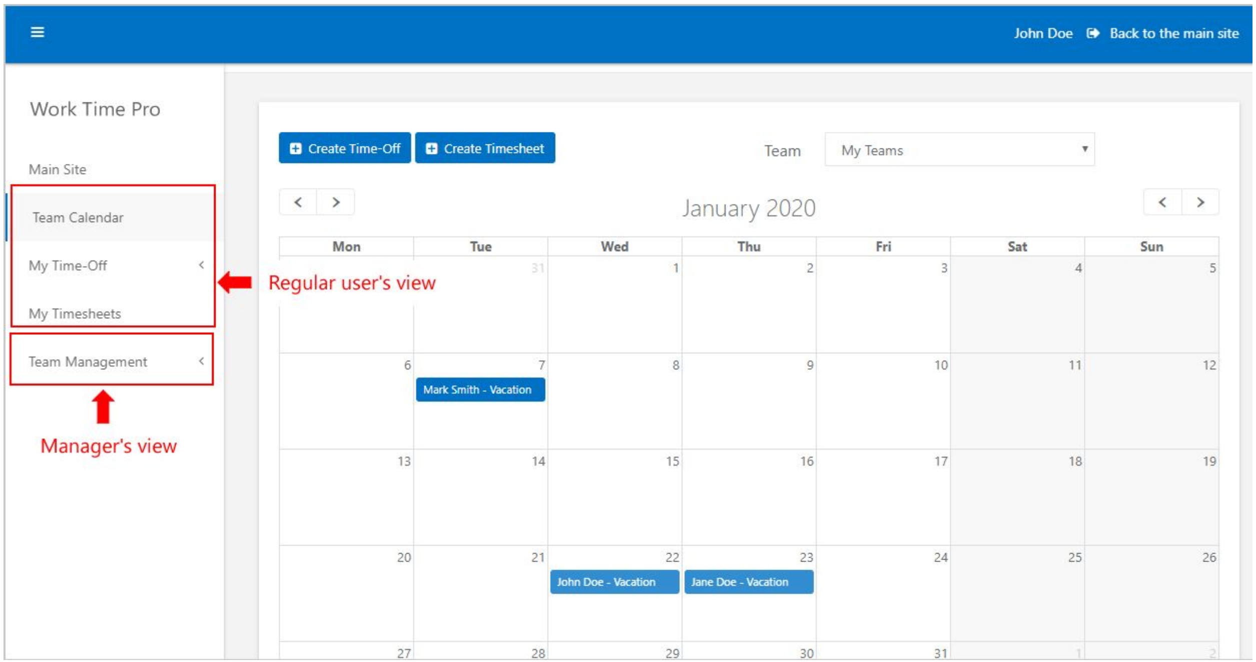
Work Time Pro

Manager's Guide

INTRODUCTION

The app layout consists of three parts: navigation menu, top bar, and the main page. The structure of the left menu differs depending on the user role and modules configuration (e.g. time-off or timesheet module might be disabled). The app offers three major user roles: regular user, manager, and administrator.



Actions available to regular users:

- Can submit new time-off request or timesheet request
- Can view own requests
- Can cancel a time-off request (only own)
- Can check own entitlement
- Can see leave requests of other employees (by change "Team" drop-down list on the team calendar) *

Actions available to managers:

All actions of regular employees plus:

- Can see subordinates' data under section "Team Management"
- Can approve or reject requests waiting for approval
- Can submit requests on behalf of subordinate *

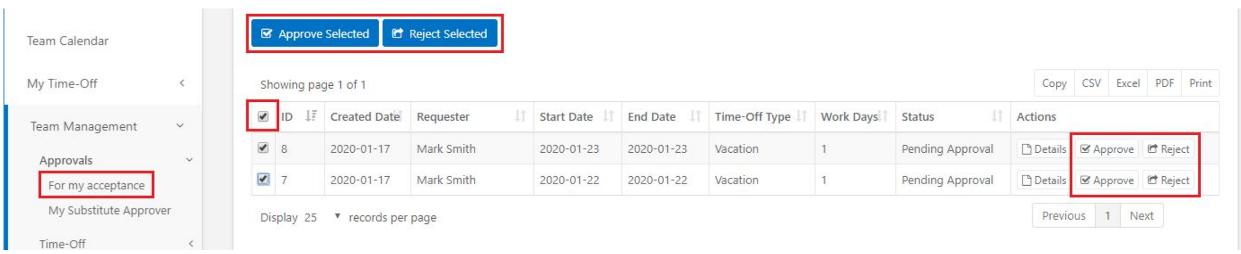
* - depends on system settings

APPROVALS

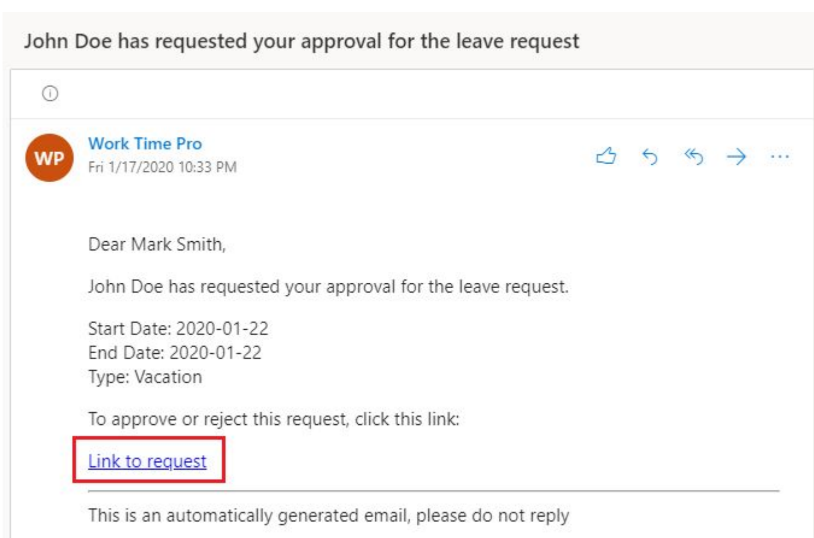
Accepting/rejecting requests

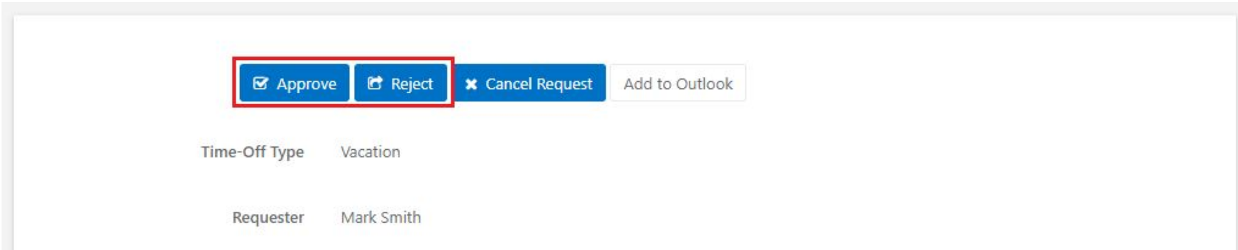
You can use one of two ways to approve or reject the request.

- Bulk mode: expand the section “Team Management” on the left menu and click on the link “For my acceptance”. Mark checkbox in the header (to select all requests) and use buttons to mass approve or reject a selected pool of requests. Optionally you can click on buttons Approve/Reject on the right side of the data table to approve/reject only the particular requests.



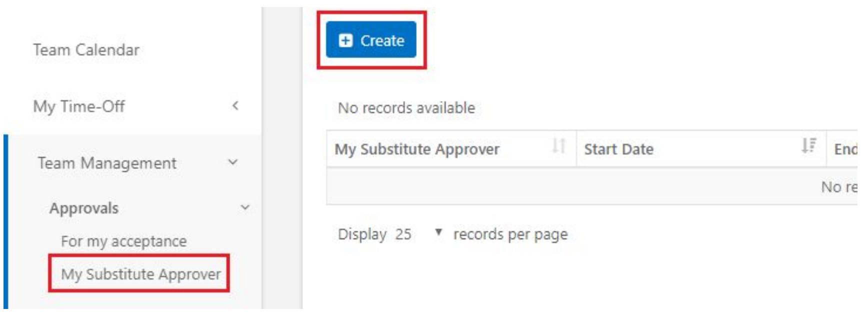
- Click on the link from email notification and approve or reject from the request detail page level



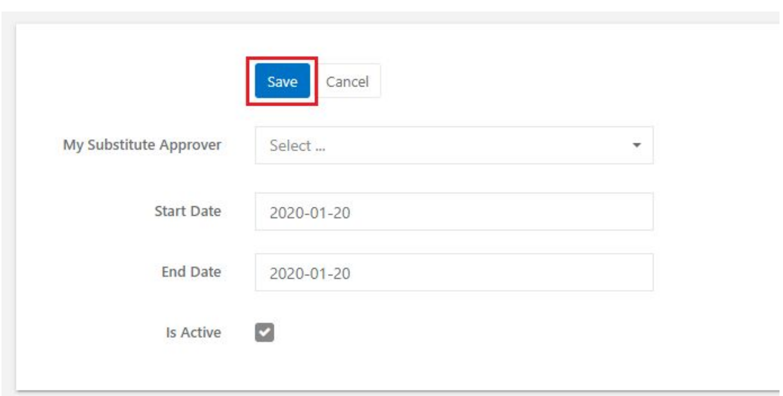


Setting up substitutions

In case of your absence (e.g. vacation period), you can pick a substitute approver for a given time period. To create your substitute approver, expand the section “Team Management” on the left menu, click on the link “My Substitute Approver” and click the button “Create”.



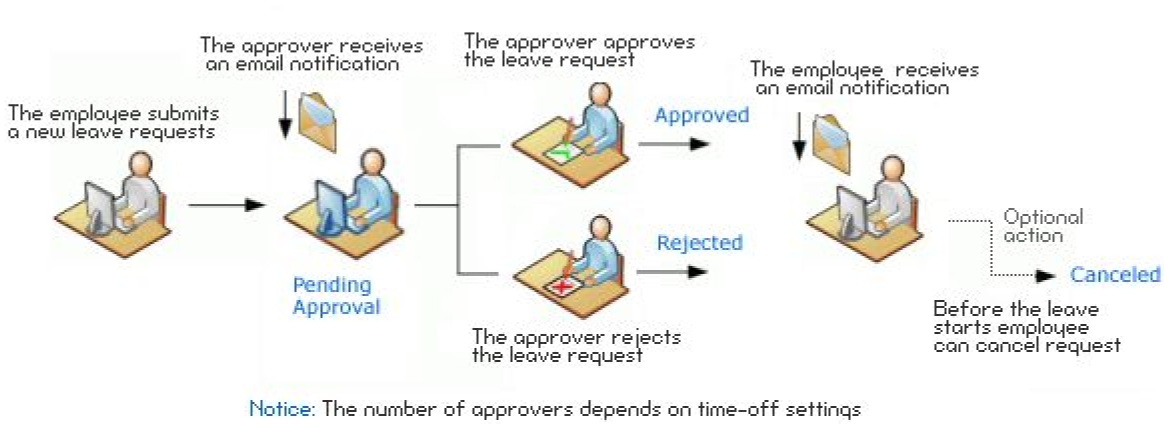
On the form select your substitute approver, start-end dates and mark flag “Is Active” (otherwise, approval redirection will be disabled).



TIME-OFF MANAGEMENT

Time-Off request workflow

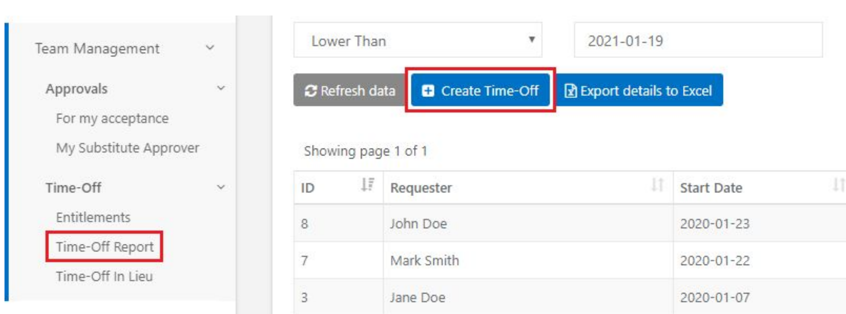
The time-off request workflow consists of four states: Pending Approval, Approved, Rejected and Cancelled. When a user submits a request, the system reduces the user's leave balance accordingly. The request is given Pending Approval or Approved status (depending on time-off policy). By default, the user can cancel a request before the leave starts – used time-off amount is returned to the available balance. The system sends an email notification of any requests to the manager for approval and email notification of approvals or rejections to the employees.



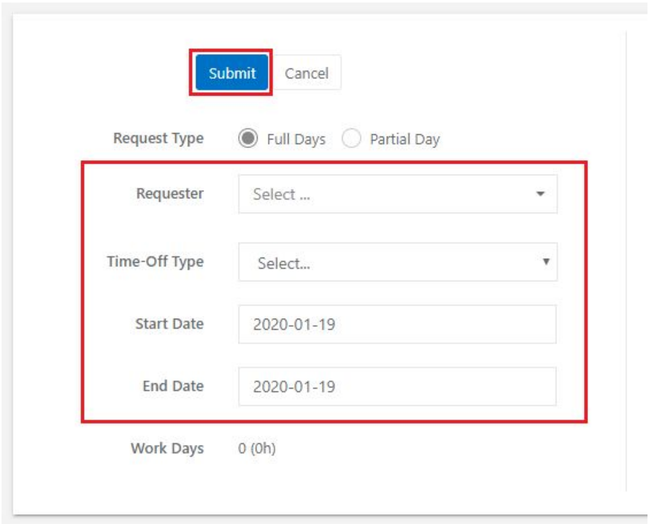
Creating a time-off request on behalf of the subordinate

If creating requests is not blocked by app admin, you can create a request on behalf of your subordinates.

Step 1) Expand section “Team Management” and click on the link “Time-Off Report”



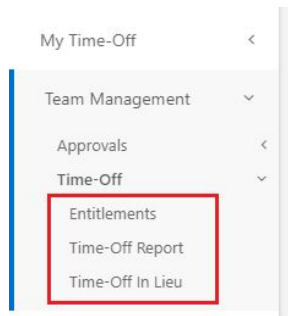
Step 2) Select Requester and other required fields (Time-Off Type, Start/End Date) and click “Submit”.



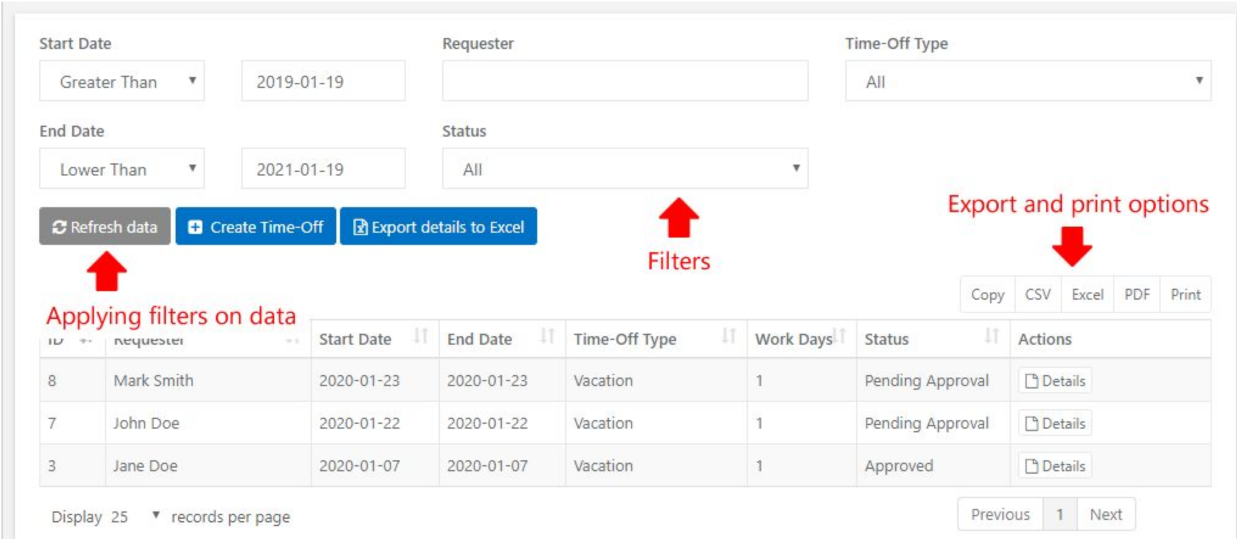
Working with Time Off Reports

Manager's reports for time-off management include 3 types of reports:

- **Entitlements** - displays time-off entitlements of manager's subordinates
- **Time-Off Repor**t - displays time-off requests of manager's subordinates
- **Time-Off In Lieu** (optional) - displays TOIL requests of manager's subordinates



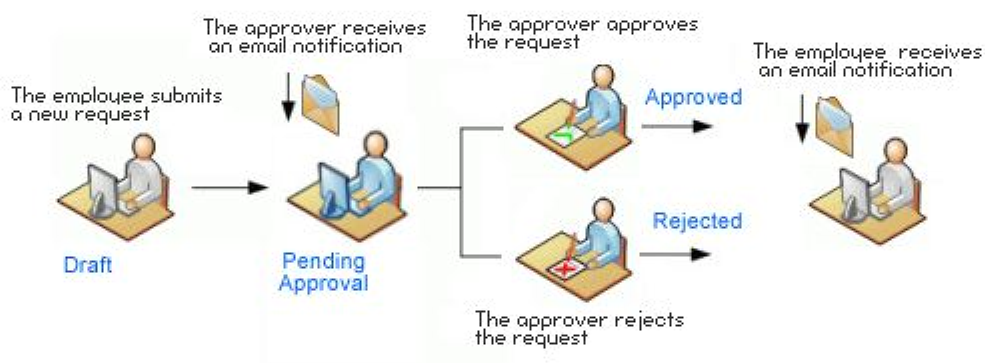
Each report contains specific filters above data tables. To apply the filter on the data table click button "Refresh data". To export or print the content of the data table (current page) use buttons located in the top-right corner of the data table.



TIMESHEETS MANAGEMENT

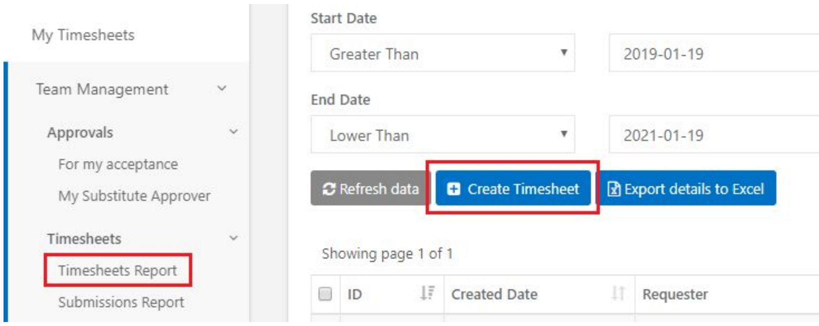
Timesheet request workflow

The timesheet workflow consists of four states: Draft, Pending Approval, Approved or Rejected. When the request is submitted, approval workflow routes a timesheet to one or more people for their approval or rejection. The approver(s) receives an email notification when a request is submitted. The requester receives an email notification when a request is approved or rejected. Rejected timesheet can be edited and submitted again.

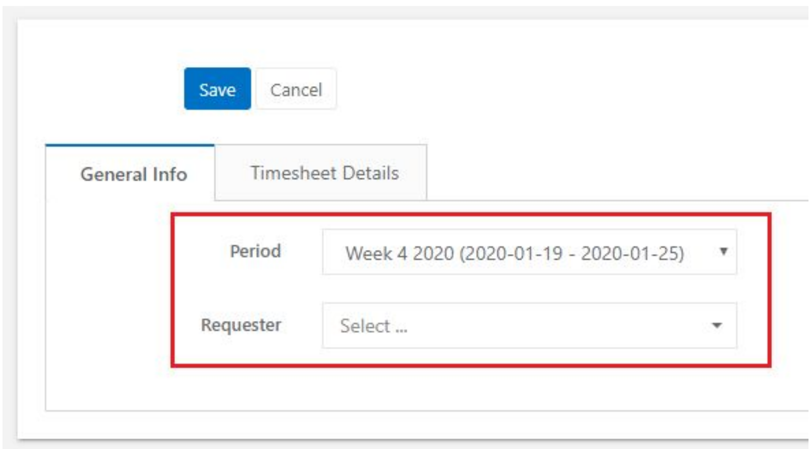


Creating a timesheet on behalf of the subordinate

Step 1) Expand section “Team Management” and click on the link “Timesheets Report”



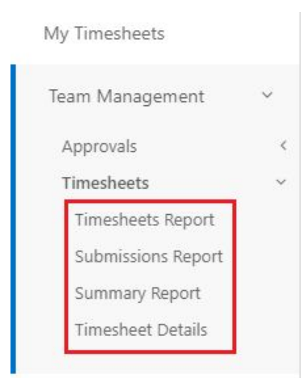
Step 2) Select fields “Period” and “Requester” and then switch to tab “Timesheet Details” to fill timesheet data.



Working with Timesheet Reports

Manager’s reports for timesheet management include 4 types of reports:

- **Timesheets Report**- displays all timesheets created by manager’s subordinates
- **Submissions Report** - displays who already created and submitted a timesheet for approval and who does not
- **Summary Report** - displays Total hours / Total costs in a given period and aggregated by the given parameter (e.g. project, requester, etc)
- **Timesheet Details** - displays timesheet details (from tab "Timesheet details") for all subordinates in one view



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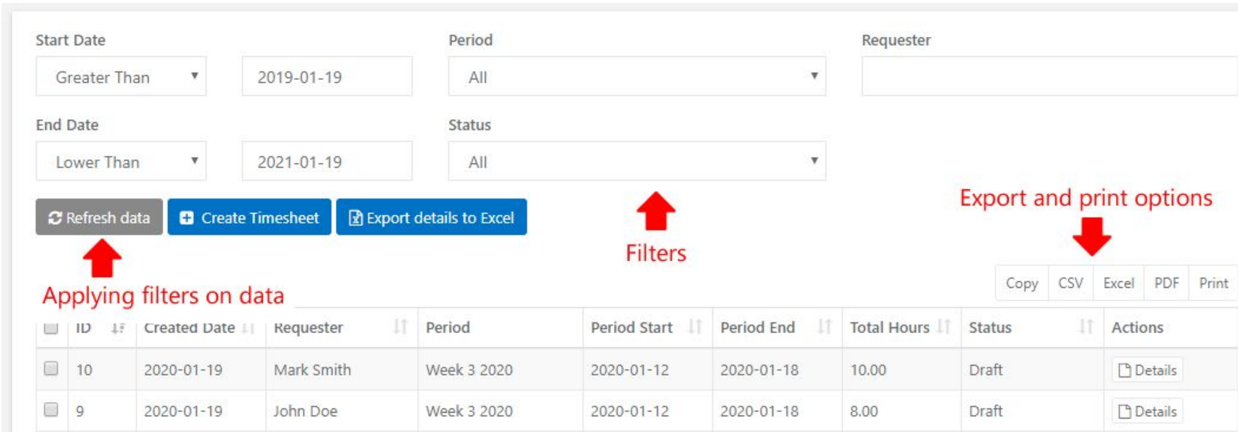
Start Date
Greater Than
2019-01-19
Period
All
Requester
End Date
Lower Than
2021-01-19
Status
All
Refresh data
Create Timesheet
Export details to Excel
Filters
Export and print options
Applying filters on data
Copy
CSV
Excel
PDF
Print
ID
Created Date
Requester
Period
Period Start
Period End
Total Hours
Status
Actions
10
2020-01-19
Mark Smith
Week 3 2020
2020-01-12
2020-01-18
10.00
Draft
Details
9
2020-01-19
John Doe
Week 3 2020
2020-01-12
2020-01-18
8.00
Draft
Details