

# **Work Time Pro**

Manager's Guide

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## 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.

=							John Doe 🏾 🖨	Back to the main sit
Work Time Pro								
Main Site		🖶 Create Time-Off 🛛 🖶	Create Timesheet		Team	My Teams	•	
Team Calendar	1	< >		-	January 2020			< >
		Mon	Tue	Wed	Thu	Fri	Sat	Sun
My Time-Off <	-	Regular user's view		1	2	3	4	5
My Timesheets								
Team Management <		6 Ma	7 rk Smith - Vacation	8	9	10	11	12
Manager's view								
		13	14	15	16	17	18	19
		20	21	22 ohn Doe - Vacation	23 Jane Doe - Vacation	24	25	26
		27	28	29	30	31		

#### 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.

ly Time-Off	<	Sho	wing pa	ge 1 of 1							Сору	CSV Excel	PDF Prin
eam Management	~		ID 17	Created Date	Requester 1	Start Date	End Date	Time-Off Type 👫	Work Days	Status 11	Actions		
Approvals	~	۲	8	2020-01-17	Mark Smith	2020-01-23	2020-01-23	Vacation	1	Pending Approval	🗋 Details	🗷 Approve	ピ Reject
For my acceptance			7	2020-01-17	Mark Smith	2020-01-22	2020-01-22	Vacation	1	Pending Approval	Details	Approve	E Reject

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



Cancel Request Add to Outlook
Time-Off Type Vacation
Requester Mark Smith

### **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".

Team Calendar	Create			
My Time-Off <	No records available			
Team Management V	My Substitute Approver	Start Date	↓F	End
Approvals ~ For my acceptance My Substitute Approver	Display 25 🔻 records per page			No re

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

	Save Cancel	
My Substitute Approver	Select	*
Start Date	2020-01-20	
End Date	2020-01-20	
Is Active		

## 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.



Notice: The number of approvers depends on time-off settings

## 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.

Team Management	~	Low	er Thar	•	2021-01-19		
Approvals For my acceptance	~	C Ref	resh da	ta 🕒 Create Time-Off	Export details t	o Excel	
My Substitute Appr	over	Showi	ng pag	e 1 of 1			
Time-Off	~	ID	17	Requester		Start Date	
Entitlements		8		John Doe		2020-01-23	
Time-Off Report		7		Mark Smith		2020-01-22	
nine-on in tieu		3		Jane Doe		2020-01-07	

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".

Request Type	Full Days Partial Day	
Requester	Select	÷
Time-Off Type	Select	
Start Date	2020-01-19	
End Date	2020-01-19	

## **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 Report** displays time-off requests of manager's subordinates
- **Time-Off In Lieu** (optional) displays TOIL requests of manager's subordinates

My Time-Off	<
Team Management	~
Approvals	<
Time-Off	~
Entitlements	
Time-Off Report	
Time-Off In Lieu	

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.

tart Date	3				R	Requester			Time-Off Type					
Greate	er Than	۳	2019-0	-19					All					1
nd Date					S	Status								
Lower	Than	*	2021-0	-19		All		*						
										Evpor	+	1 min	ton	
C Refres	sh data	🛨 Cre	ate Time-C	ff 💽 Expo	ort deta	ails to Excel	1			схрог	t and		it op	tion
2 Refres	sh data	🛨 Cre	ate Time-C	ff 🛛 🗹 Expo	ort deta	ails to Excel	Filters			схрог	t and	<b>I</b>	it op	tion
2 Refres	sh data		eate Time-C	ff 🛛 🖻 Expo	ort deta	ails to Excel	Filters			Сору	csv		PDF	Prin
C Refres مراجع	sh data ing filt	E Cre ers Ol	eate Time-C	ff 💽 Expo	ort deta	ails to Excel	Filters	Work Days	Status	Сору	CSV Actio	Excel	PDF	Prin
Refres	sh data ing filt requeste Mark Smi	ers Ol	n data	ff Expo Start Date 2020-01-23	ort deta	End Date If 2020-01-23	Filters Time-Off Type If Vacation	Work Days	Status Pending App	Copy 11 proval	CSV Action	Excel	PDF	Prin
Refres	sh data ing filt Nequeste Mark Smi John Doe	ers or ers or ith	ate Time-C	ff Expo Start Date 2020-01-23 2020-01-22	ort deta	ails to Excel           End Date           2020-01-23           2020-01-22	Filters Time-Off Type 11 Vacation Vacation	Work Days	Status Pending App Pending App	Copy 11 proval	CSV Action	Excel ns etails	PDF	Prin

# 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"

ly milesticets	Greater Than	*	2019-01-19
eam Management 🛛 🗸	End Date		
Approvals ~	Lower Than	•	2021-01- <mark>1</mark> 9
For my acceptance My Substitute Approver	2 Refresh data	<b>±</b> Create Timesheet	Export details to Excel
		-61	
Timesheets ~	Showing page 1	011	

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

and the second		-	
General Info	Timesh	eet Details	
Γ	Period	Week 4 2020 (2020-01-	19 - 2020-01-25) 🔻
	Requester	Select	

## **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

eam Management	~
Approvals	<
Timesheets	~
Timesheets Report	
Submissions Report	
Summary Report	

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.

Start	Date				Period			Requester						
G	reater Th	an 🔻	2019-01-	19	All		v							
nd	Date				Status									
L	ower Thai	n 🔻	2021-01-	19	All		٣							
												int o	ntin	
C	Refresh da	ata 📑 Crea	te Timesheet	🖻 Expo	rt details to Excel				Expoi	rt and	pr		ptio	ons
æ Ar	Refresh da	ata 🖸 Crea	te Timesheet	🖹 Expo	rt details to Excel	Filters			c	rt and		Excel	PDF	Prin
е Ар	Refresh da poplying بر ما	filters on Created Date	te Timesheet data e +1 Request	Expo er	rt details to Excel	Filters	Period End	Total Hours ⊥↑	C Status	rt and	pr V IV	Excel Actio	PDF	Prir
₽ Ap	Refresh da polying ID 47 10	filters on Created Date 2020-01-19	te Timesheet data te 1 Request Mark Sr	Expo ter	rt details to Excel Period Week 3 2020	Period Start 17 2020-01-12	Period End 11 2020-01-18	Total Hours 1	Constant Status	rt and	pr v 1t	Excel Actio	PDF ns etails	Prin