

# Work Time Pro

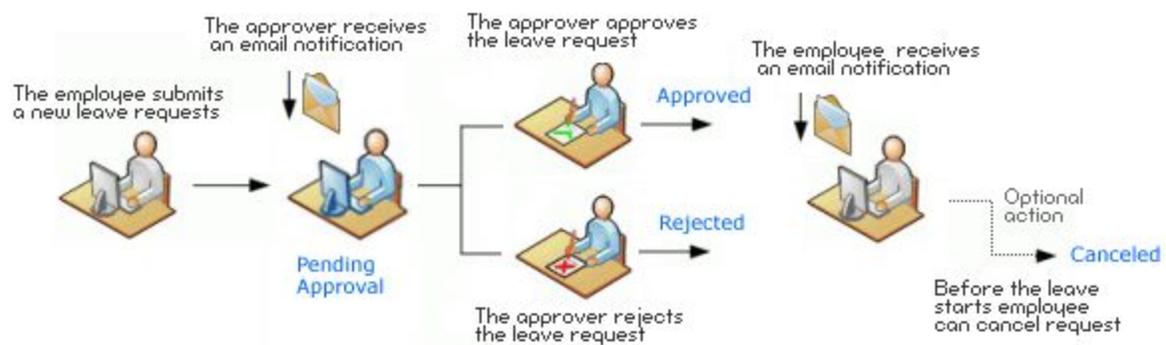
## User's Guide

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## TIME-OFF MANAGEMENT

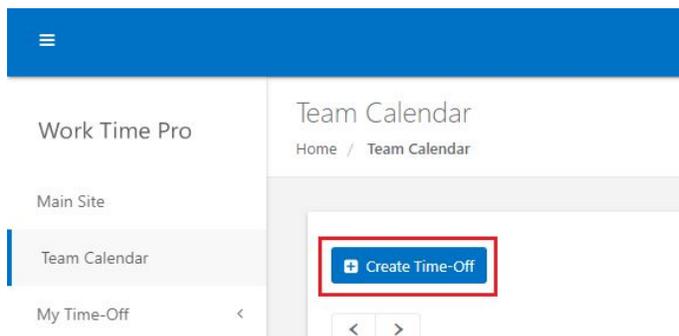
### Time-Off request workflow

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 – the leave 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.



### Applying for time-off request

To apply for the time-off request click button “Create Time-Off” on the main app page.



On the request form select:

- **Request Type** (Full Days or Partial Days)
- **Time-Off Type** (e.g. Vacation)
- **Start/End Dates** (when request start and ends)

Afterward, click on the button “Submit” to submit the request.

Time-Off Type	Available now	Available later
Vacation	100	99



**On the right side of the form, you can see current entitlement status: time-off available before and after request submission.**

## Viewing my time-off request status

Full info about the request is displayed on the request details page. There are two ways to enter the request details page:

1. Click the mouse on the team calendar event

Mon	Tue	Wed	Thu
30	31	1	
6	7 John Doe - Vacation	8	
13	14	15	

2. Expand “My Time-Off” on the left menu, click on link “Requests” and then click on “Details”

Main Site

Team Calendar

My Time-Off

**Requests**

Entitlement

Showing page 1 of 1

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ID	Time-Off Type	Start Date	End Date	Work Days	Status	Actions
3	Vacation	2020-01-06	2020-01-06	1	Approved	<a href="#">Details</a>

Display 25 records per page

Previous 1 Next

Request details page display current request status (field “Status”) and also the current state of approval (if particular approver already approved request).

Status	Approved
Created Date	2020-01-08
Start Date	2020-01-07
End Date	2020-01-07
Work Days	1 (8h)
Approver	Jane Doe (Approved 2020-01-08)

## Canceling my time-off request

First, you need to enter the request details page (it’s explained in the previous section). Afterward, click on the button “Cancel Request” and confirm cancelation.

<a href="#">Cancel Request</a>	<a href="#">Add to Outlook</a>
Time-Off Type	Vacation
Requester	John Doe

## Viewing my entitlements

To view your entitlement status, expand “My Time-Off” on the left menu and click on the link “Entitlements”.

Team Calendar

My Time-Off

- Requests
- Entitlement**
- Time-Off In Lieu

Showing page 1 of 1

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ID	Time-Off Type	Accrued This Year	Carried Over	Used This Year	TOIL	Available
1	Vacation	100	0	1	1	100

Display 25 records per page

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Each entitlement entry consists of the following fields:

- **Time-Off Type** - a type of entitlement (e.g. Vacation, Sick Leave, etc)
- **Accrued This Year** - the amount of entitlement accrued since the beginning of the annual cycle (e.g. 1st January for the calendar year). It's especially important for the monthly accruals.
- **Carried Over** - the amount of entitlement carried over from previous annual cycle (if the organization's policy allows for carry-over)
- **Used This Year** - the amount of entitlement used since the beginning of the annual cycle
- **Available** - the amount of entitlement available to use

## Applying for TOIL request ( "Time-Off in Lieu" )

TOIL (Time-Off in Lieu) or Compensatory Time is paid time off given to an employee instead of overtime pay. To apply for TOIL, expand "My Time-Off" on the left menu, select the link "Time-Off In Lieu" and click the button "Create Time-Off In Lieu".

Team Calendar

My Time-Off

- Requests
- Entitlement
- Time-Off In Lieu**

**Create Time-Off In Lieu**

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ID	Earned From	Earned To	Entitlement	TOIL To Be Accrued	Status	Actions
1	2020-01-15	2020-01-15	Vacation	1.00	Approved	Details

Display 25 records per page

Previous 1 Next

On the request form select:

- **Entitlement** (e.g. Vacation)
- **Earned From/Earned To** - time frame when requested TOIL amount has been earned (e.g. last week)
- **TOIL To Be Accrued** - the amount of TOIL (e.g. 1 day)
- **Reason** (optional) - reasons or notes for the request

Afterward, click on the button "Submit" to submit the request.

Entitlement:

Earned From:

Earned To:

TOIL To Be Accrued:

Reason:

When the request is approved, the requested TOIL amount will be added to the “TOIL” column in entitlement details view (My Time-Off -> Entitlements) and will increase the “Available” field.

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ID	Time-Off Type	Accrued This Year	Carried Over	Used This Year	TOIL	Available
1	Vacation	100	0	1	2	101

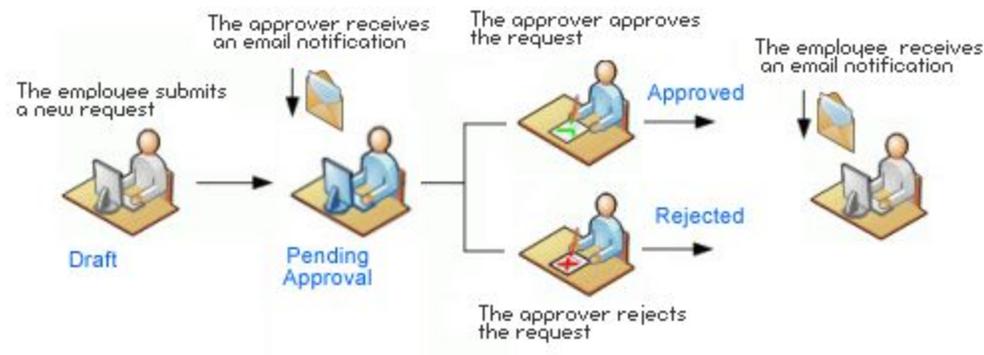
Display 25 records per page

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# TIMESHEETS MANAGEMENT

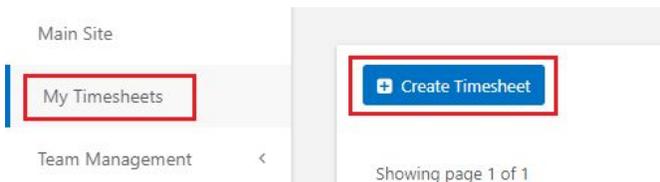
## Timesheet request workflow

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.

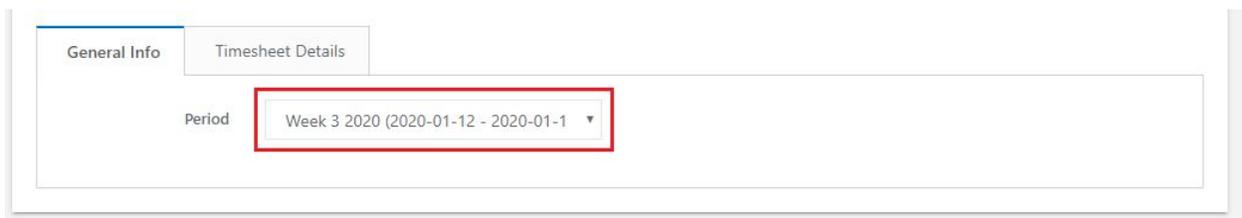


## Creating a new timesheet

To create a timesheet request, click the button “Create Timesheet” on the main app page or under the link “My Timesheets” in the left menu.



Step 1) Under tab “General Info” select timesheet period



Step 2) Fill the timesheet data under tab “Timesheet Details”

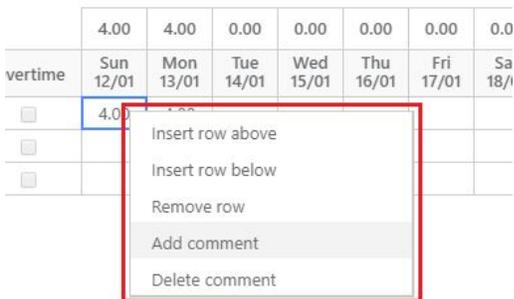
To enter hours worked on a particular day, click the mouse button on the selected cell and type number of hours.

Note: the below screenshot presents the sample timesheet form. The form might be totally different, depending on the configuration.

The screenshot shows a software interface with a 'Save' button highlighted in a red box. Below it are two tabs: 'General Info' and 'Timesheet Details'. The 'Timesheet Details' tab contains summary statistics: Total Hours (8.00), Billable Hours (0.00), and Overtime Hours (0.00). Below these is a table with columns for Project/Task, Billable, Overtime, and days of the week (Sun 12/01 to Sat 18/01), plus a Total Hours column. Two rows are visible: 'Project > Task 1' with 4.00 hours on Sun and 4.00 on Mon, and 'Project > Task 2' with 0.00 hours on all days. The cells for 4.00 on Sun and Mon are highlighted with a red box.

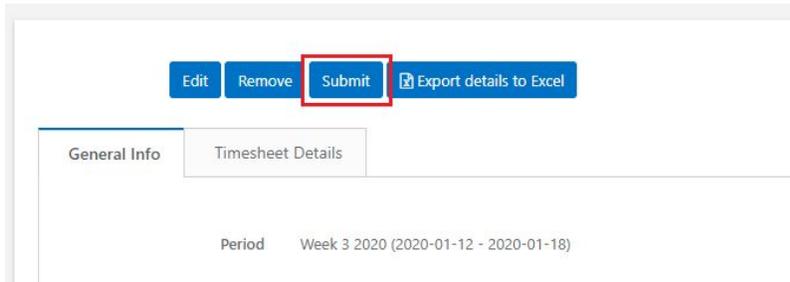
Step 3 ) When editing is finished, click the “Save” button to save timesheet.

 **To remove a row or add a comment to the cell, click the right mouse button on the selected cell to run the context menu.**



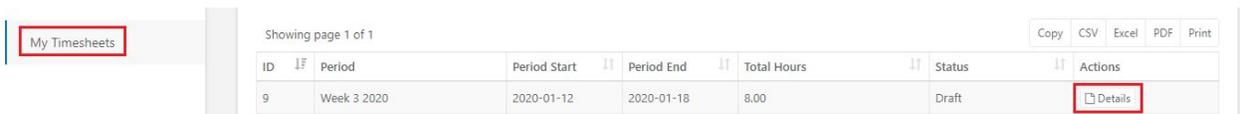
## Submitting timesheet for approval

To submit a timesheet for approval, enter the timesheet details page and click the “Submit” button. Afterward, the approver will receive an email notification with a link to approve/reject the request.



## Viewing my timesheet status

First, click on “My Timesheets” link on the left menu, afterward click on “Details”



The screenshot shows a table with the following data:

ID	Period	Period Start	Period End	Total Hours	Status	Actions
9	Week 3 2020	2020-01-12	2020-01-18	8.00	Draft	<a href="#">Details</a>

The 'My Timesheets' link in the left menu and the 'Details' link in the table are highlighted with red boxes.

Field “Status” displays the current status of the timesheet request. You can also check what is the detailed approval status (current approver and date of approval).



The screenshot shows the detailed approval status for a timesheet request. The 'Status' is 'Pending Approval'. The 'Created Date' is '2020-01-17' and the 'Modified Date' is '2020-01-17'. The 'Approver 1' is 'Jane Doe (Approved 2020-01-17)' and the 'Approver 2' is 'Mark Smith (Pending Approval)'. The 'Status' and the approver information are highlighted with red boxes.

Status	Pending Approval
Created Date	2020-01-17
Modified Date	2020-01-17
Approver 1	Jane Doe (Approved 2020-01-17)
Approver 2	Mark Smith (Pending Approval)