



Web TimeOff Management Implementation Guide

from REPLICON

version 1.0



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Chapter 1

About Web TimeOff

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Web TimeOff from Replicon, a web-based vacation tracking application is designed to define and manage time off, for the employees in an organization. It lets you define employee types, permission types, categories and holiday calendars.

You can request time off and view the list of time off requests awaiting approval. Using the calendar views, you can review the time off status for a single employee, or your entire team, depending on your login permissions.

Predefined reports enable you to gain visibility into the time off accruals, employee time off status, and the employee details.

Web TimeOff Concepts

The following is a list of concepts or terminology used in Web TimeOff.

- **Calendar**

A calendar is a dashboard that allows you to view your time off status or the status of time off requests for you entire team. You can also request time off, approve or reject time off requests for team members, and modify existing time off requests from the Calendar.

- **Category**

A category is used to define a group or groups of employees. An employee may belong to one or more groups or categories.

- **Default Data**

Web TimeOff includes default data (this is different from the sample data available with the Demonstration Version). The default data includes a number of initialization settings for various areas within Web TimeOff, such as employee types, categories, time off types, and permission types. Default data can be modified if necessary.

- **Employee Type**

An employee type is a group that identifies employees for the purposes of time off tracking. Employee types may be used to filter lists on various screens throughout Web TimeOff, or to limit the amount of data displayed in reports.
- **Holiday Calendar**

A holiday calendar is a means for defining a set of statutory (civic) holidays and assigning those holidays to specific employees.
- **Permission Type**

Permission types define the level of access and enabled features (actions) for a specific employee.
- **Reports**

Reports are helpful for tracking employee and time off information throughout your organization. Report data can be customized based on specific selection criteria such as groups or employees.
- **Sample Data**

Sample data allows you to evaluate Web TimeOff while avoiding the time-consuming administrative tasks such as defining users, setting up holiday calendars, or defining a system configuration.
- **Selection Criteria**

Selection criteria are used to filter the employee data displayed on list screens, calendars, and reports.
- **Time Off**

Time off is a period of time during which an employee is absent from the work environment and unable to perform job related tasks.
- **Time Off Type**

A time off type is an item that identifies the different types of absences allowed in the organization, such as vacation or sick time.

System Requirements

Depending on the Web TimeOff version you are planning to install, your system must meet the following hardware and software specifications:

Minimum System Requirements

Application/Database Server

- Hardware requirements:
 - PC with P500 CPU or equivalent
 - 512MB memory
 - 50MB available disk space
- Operating system requirements: - one of the following:
 - Microsoft Windows 2000 with SP1 or higher
 - Microsoft Windows Server 2003
 - Microsoft Windows XP Professional
 - Microsoft Windows XP Home - *for the Demonstration Version only*
- Other software
 - .NET framework version 1.1
 - Microsoft Internet Information Services (IIS) version 5.0 or higher - *for the Full Version only.*
 - MDAC (Microsoft Data Access Components) version 2.6 or higher.
 - SMTP (required for e-mail support)

Note: *When installing Web TimeOff for the first time, the installer will check for existing installations of the .NET framework and MDAC. If either is missing, the installer will automatically download and install them as part of the installation process.*

Web TimeOff Client

- Hardware requirements:
 - PC with P500 CPU or equivalent
 - 256MB memory
 - 50MB available disk space
- Minimum screen resolution of 1024x768.
- Operating system requirements:
 - Microsoft Windows 98/2000/XP

- Browser requirements
 - Internet Explorer 5.5 or higher
 - Mozilla Firefox 1.0

Note: See “Preparing your System” for browser configuration information.

Recommended System Requirements

Web TimeOff Server

- Hardware requirements.

No. of Users	Requirements
Under 50 users	<ul style="list-style-type: none"> • PC with P500 CPU or equivalent • 1GB memory • 50MB available disk space
50 to 200 users	<ul style="list-style-type: none"> • PC with Pentium 1GHz CPU or equivalent • 1GB memory • 50MB available disk space
200 + users	<ul style="list-style-type: none"> • PC with Pentium 2GHz or equivalent • 1GB+ memory • 50MB available disk space

- Operating system requirements - one of the following:
 - Microsoft Windows 2000 with SP1 or higher
 - Microsoft Windows Server 2003
 - Microsoft Windows XP Professional
- Other software
 - .NET framework version 1.1
 - Microsoft Internet Information Services (IIS) version 5.0 or higher - for the *Full Version* only.
 - MDAC (Microsoft Data Access Components) version 2.6 or higher.
 - SMTP (required for e-mail support)

Note: When installing Web TimeOff for the first time, the installer will check for existing installations of the .NET framework and MDAC. If either is missing, the installer will automatically download and install them as part of the installation process.

Web TimeOff Database Server

- Hardware requirements.

No. of Users	Requirements
Under 50 users	<ul style="list-style-type: none">• PC with P500 CPU or equivalent• 1GB memory• 50MB available disk space
50 to 200 users	<ul style="list-style-type: none">• PC with Pentium 1GHz CPU or equivalent• 1GB memory• 50MB available disk space
200 + users	<ul style="list-style-type: none">• PC with Pentium 2GHz or equivalent• 1GB+ memory• 50MB available disk space

- Operating system requirements - one of the following:
 - Microsoft Windows 2000 with SP1 or higher
 - Microsoft Windows 2003
 - Microsoft Windows XP Professional
- One of the following databases:
 - Microsoft Database Engine (MSDE)
 - Microsoft SQL Server 2000
 - Microsoft SQL Server 7 with SP3

Web TimeOff Client

- Hardware requirements:
 - PC with P500 CPU or equivalent
 - 512MB memory
 - 50MB available disk space

- Operating system requirements - one of the following:
 - Microsoft Windows 98/ME
 - Microsoft Windows NT 4.0
 - Microsoft Windows 2000
 - Microsoft Windows XP
 - Microsoft Windows Server 2003
- Browser requirements
 - Internet Explorer 5.5 or higher
 - Mozilla Firefox 1.0

Note: See *“Preparing your System”* for browser configuration information.

Preparing your System

Before you install Web TimeOff, make sure you have prepared your system as follows.

Configure your Hardware

Make sure your hardware configuration meets the specifications required for the version of Web TimeOff you plan to install, as described in the *System Requirements* section.

Configure your System Software

Make sure your software configuration meets the specifications required for the version of Web TimeOff you plan to install, as described in the *System Requirements* section.

Install ASP.NET on Microsoft Windows Server 2003

If you plan to install Web TimeOff on Windows Server 2003, make sure that ASP.NET is installed.

To install ASP.NET on a server running Windows Server 2003, using the Add or Remove Programs dialog box:

1. From the **Start** menu, point to **Control Panel**, then click **Add or Remove Programs**.
2. In the **Add or Remove Programs** dialog box, click **Add/Remove Windows Components**.
3. In the **Components** box in the Windows Components wizard, select the **Application Server** check box, then click **Next**.
4. When the Windows Components wizard has finished configuring Windows Server 2003, click **Finish**.

Configure your Browser

Web TimeOff supports the following browsers:

- Internet Explorer 5.5 or higher
- Mozilla Firefox 1.0

Configure your chosen browser:

- Disable pop-up blockers, both in your browser and in any browser plug-ins and tool bars.
- Ensure cookies and JavaScript are enabled.
- If you are using Firefox, when asked if you want to save passwords for this site, select **Never Save**. This is because the save passwords feature inhibits some editing features in Web TimeOff.

Installing Web TimeOff

The software for both the Demonstration version and the Full version of Web TimeOff are available from the Replicon web site.

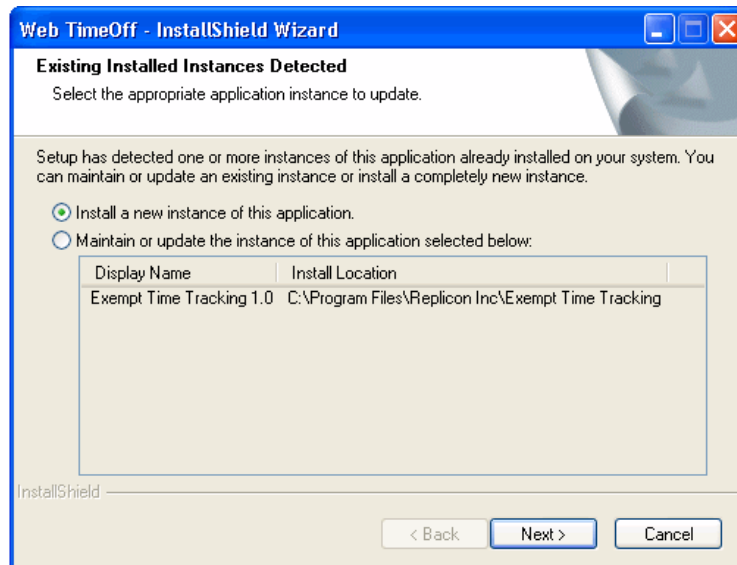
You can either download the installation program to your local computer, or you can run the installation over the internet. Your choice will depend on where you are planning to install the application, and the speed of your connection.

Installing Over a Previous Version

If you have a previous version of Web TimeOff installed and when you run the installation program, you will be asked to choose whether you want to update the installed version or the new version.

Select the installation option you want and click **Next** to continue. Now go to one of the following sections:

- Installing the Demonstration Version
- Installing the Full Version.

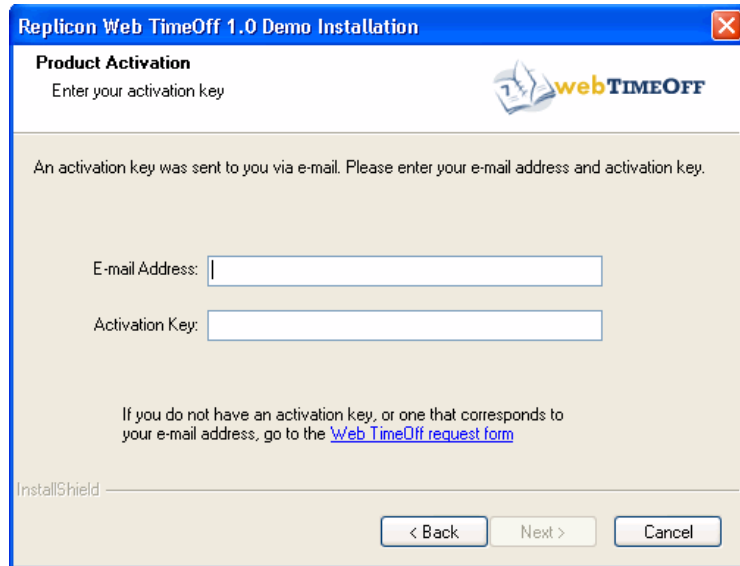


Installing the Demonstration Version

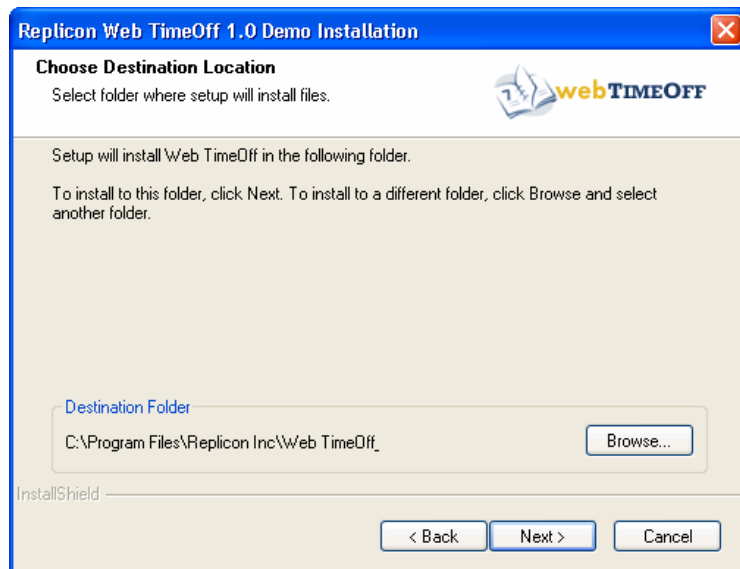
You can install the Demonstration version as follows:

1. Run the installation program.

Note: If you do not have an activation key, click the **Web TimeOff request form link**, and enter the details. The activation key will be sent to your e-mail address.

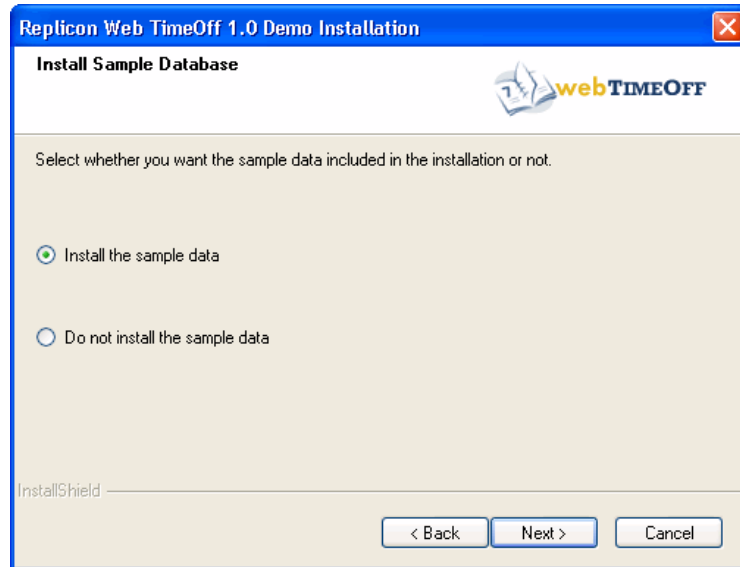


4. Choose an installation location (or simply leave the default) and click **Next..**

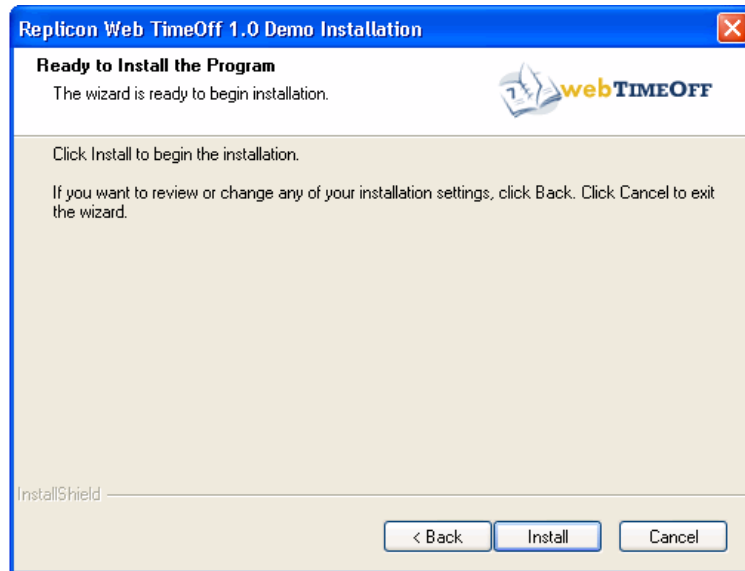


5. Web TimeOff can be installed with a sample database that contains information necessary to thoroughly evaluate the application. The sample database allows you to avoid time-consuming administrative tasks such as defining users, setting up holiday calendars, and customizing your system configuration when you are evaluating the product.

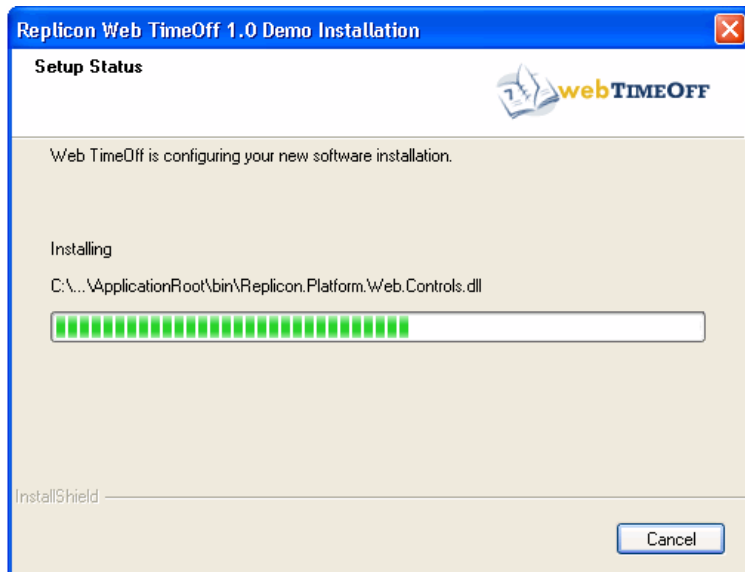
Choose whether you want to install the sample data, then click **Next**.



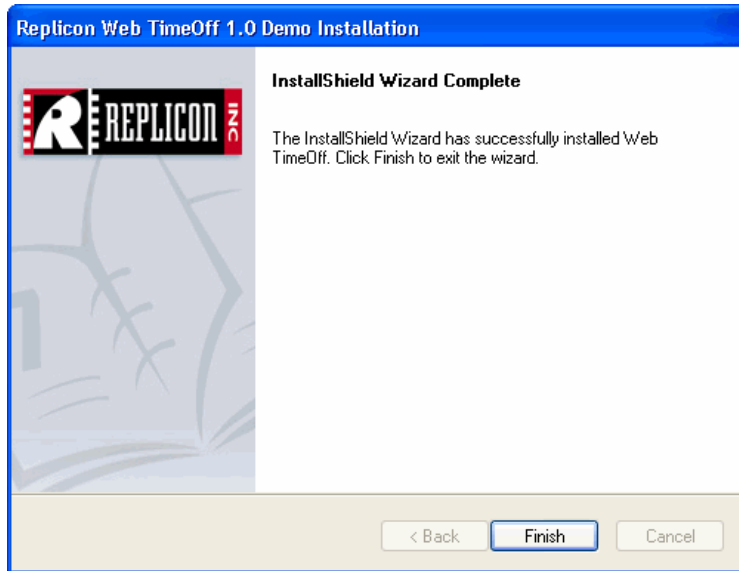
6. You are ready to install the software. Click **Install**..



7. Wait for the software to be installed..



8. When the installation is complete, click **Finish**.



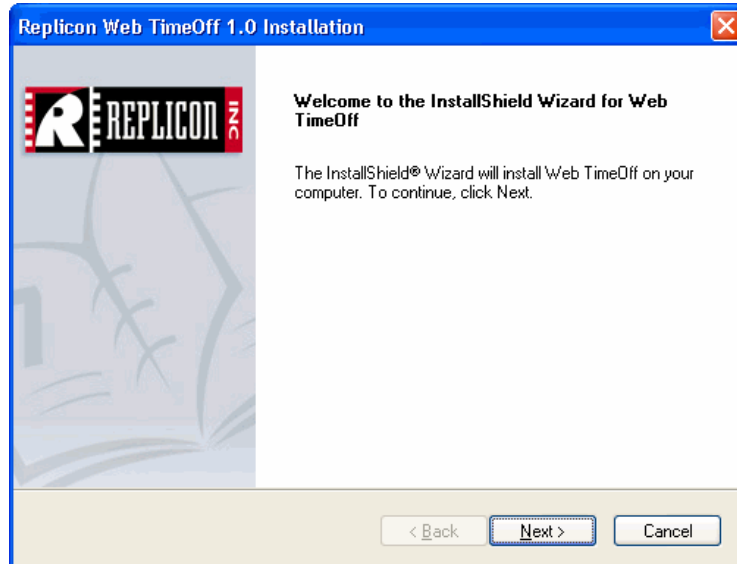
9. The Web TimeOff software login screen will open in a browser. Go to the section called *Logging in for the First Time*, later in this document.

Installing the Full Version

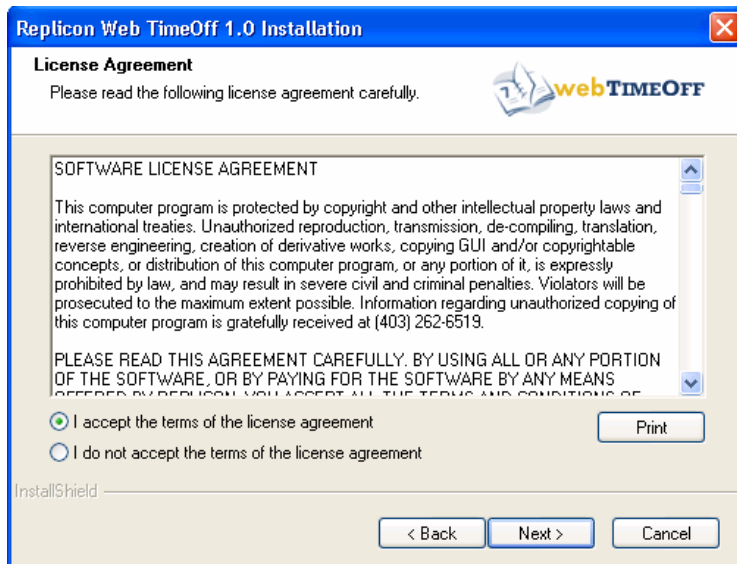
You can install the full version as follows.

1. Run the installation program.

The Welcome screen is displayed. Click **Next**.

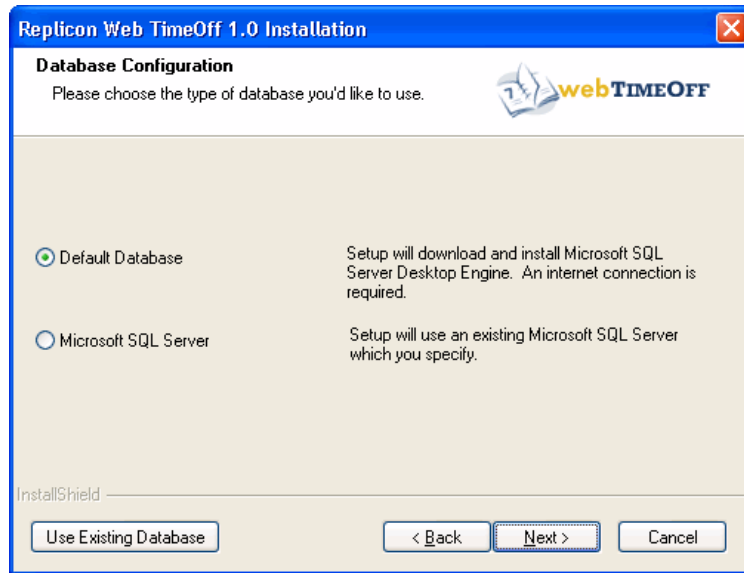


2. Read the license agreement. If you agree to the terms, select the "I accept..." option and click **Next**.

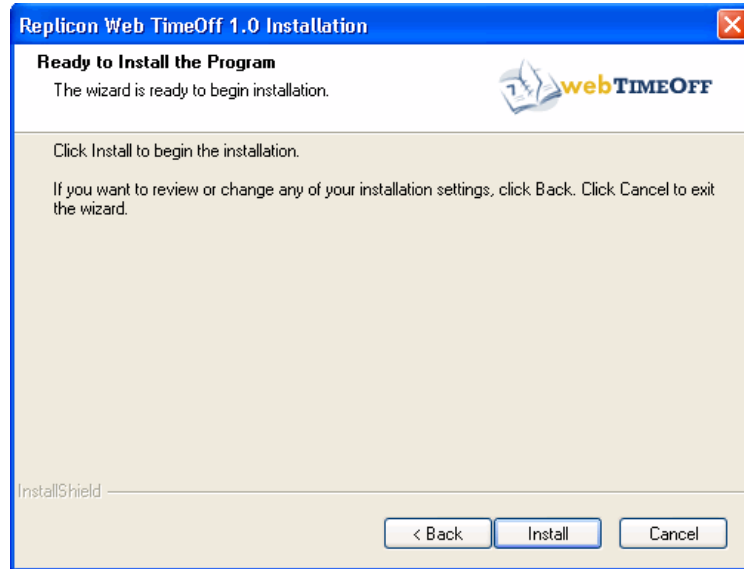


- If you select Default Database, the installation program will install the Microsoft SQL Server Desktop Engine (MSDE).
- If you select Microsoft SQL Server, you will be asked to specify the SQL server hosting the database, and an administrative login name and password for this database.
- If you choose to use an existing database you will be asked to specify the database, as follows:
 - If the existing database you wish to use is a Microsoft Access database, you will be asked to specify the source database.
 - If the existing database you wish to use is a Microsoft SQL database, you will be asked to specify the SQL server, the database name, and the login name and password for this database.

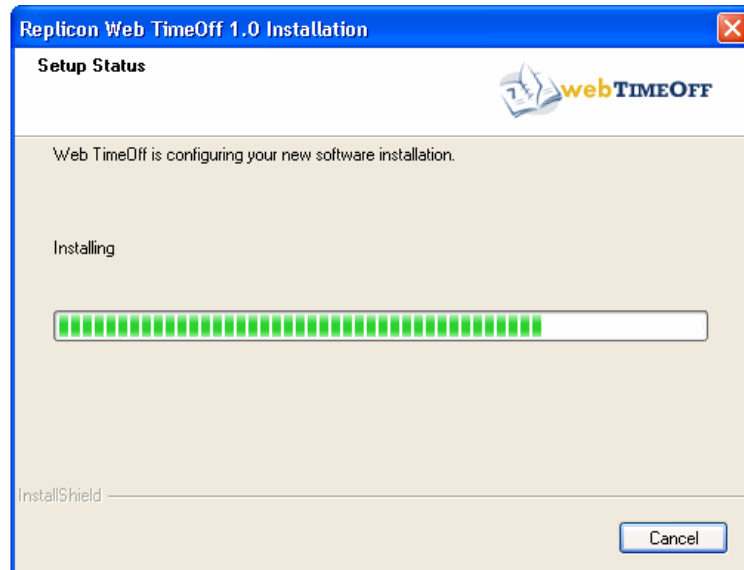
When you are done, click **Next**.



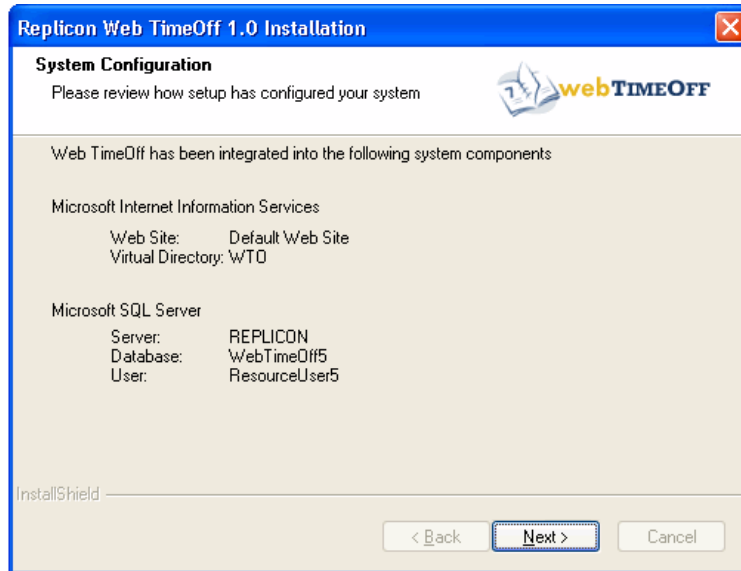
6. You are ready to install the software. Click **Install**.



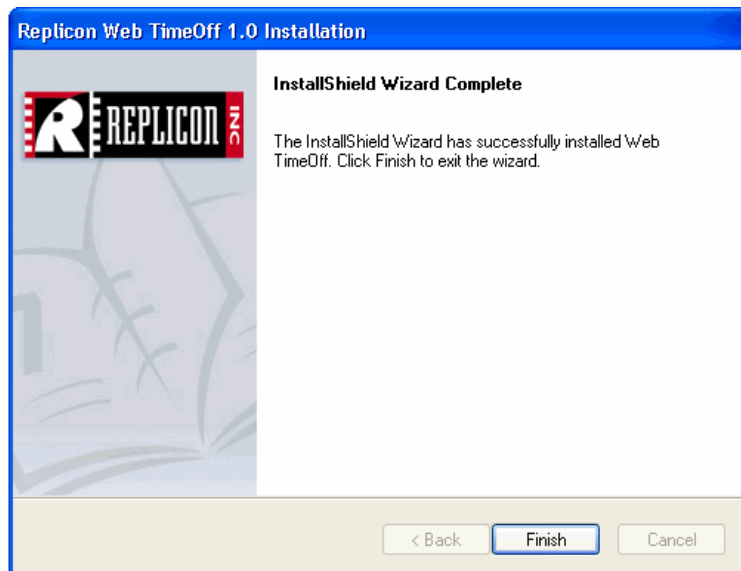
7. Allow the program to install the software.



- Review the System Configuration screen. If this is OK, click **Next**.



- When the installation is completed, click **Finish**.



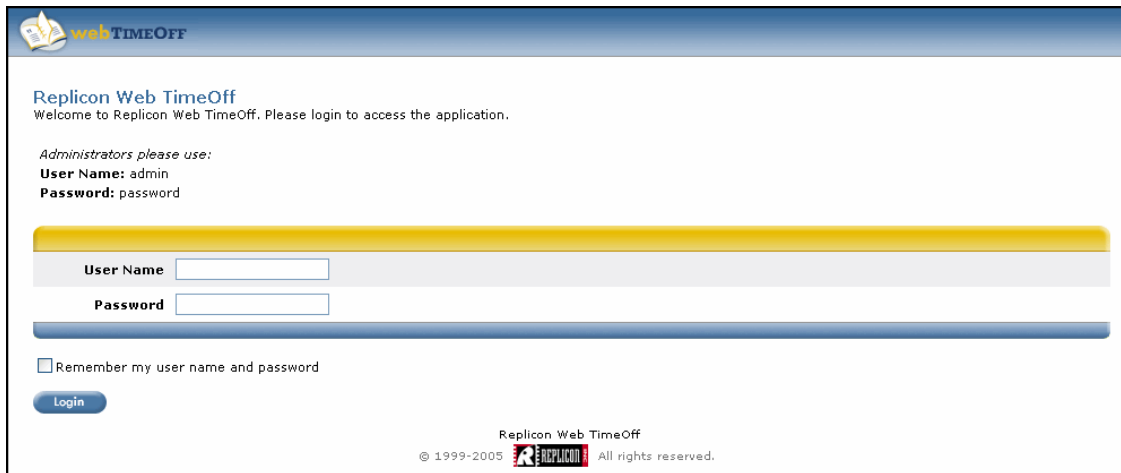
- The Web TimeOff login screen will open in a browser. Go to the section called *Logging In for the First Time*, later in this document.

Logging In for the First Time

When you have finished installing the software, the Log In screen will appear. This first screen may take a few seconds to appear.

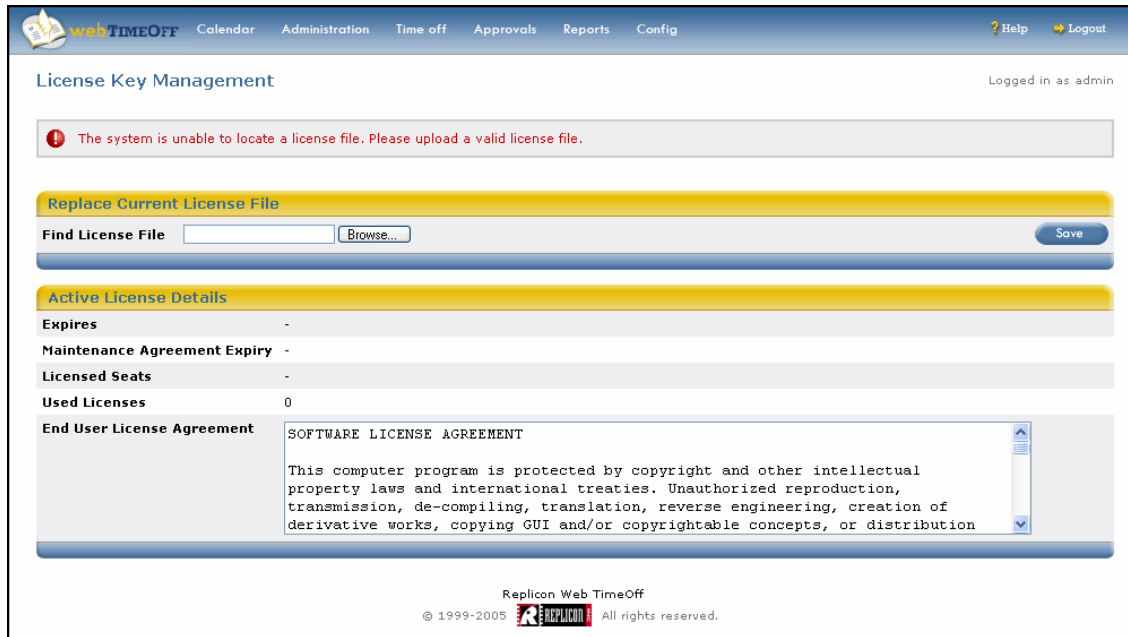
1. You can login for the first time as user `admin` with the password `password`. When you have entered your login name and password, click the **Login** button.

If you installed the Demonstration version, you will be taken to the Web Resource Welcome screen. Go to *Chapter 3, Using Web Resource*, later in this document.



The screenshot shows the login interface for Replicon Web TimeOff. At the top left is the logo with the text "webTIMEOFF". Below the logo, the title "Replicon Web TimeOff" is displayed, followed by a welcome message: "Welcome to Replicon Web TimeOff. Please login to access the application." A note for administrators provides the default credentials: "Administrators please use: User Name: admin Password: password". The login form consists of two input fields, "User Name" and "Password", each with a yellow highlight bar above it. Below the fields is a checkbox labeled "Remember my user name and password" and a blue "Login" button. At the bottom, the footer contains the text "Replicon Web TimeOff © 1999-2005 [REPLICON] All rights reserved."

2. If you installed the Full version, the **License Key Management** screen appears.



3. You must now add a license before you can use the software.

You received a license file (*License.lic* or similar) as an attachment to an e-mail from Replicon. Detach this file from the email.

Save this file to the installation computer. To make it easier to find the file after saving it, you should save it to a suitable location such as the Web TimeOff ApplicationRoot directory on the installation computer. If you accepted the default installation location, the file will be located in the following directory:

```
c:\Program Files\Replicon Inc\WebTimeOff\ApplicationRoot
```

4. In the **Find license file** field, enter or browse to the path for the license key file and click **Save**. The License Key Management screen will be refreshed with your license details.

Chapter 3

Using Web TimeOff



This chapter describes how to use Web TimeOff.

Logging In

To log on to Web TimeOff.

1. To log on to Web TimeOff:

- If you are running **Web TimeOff** on the server, click **Start > Programs > Replicon Web TimeOff > Launch Web TimeOff**.
- If you are running **Web TimeOff** on a client, open your browser and enter the URL for Web TimeOff:
 - for the demonstration version: `http://localhost:<port number>`
 - for the full version: `http://localhost:<virtual directory name>`

2. The Web TimeOff login screen is displayed.

3. Enter your user name and password and click **Login**.

Note: Passwords are case sensitive.

Calendar

To drop down the calendar menu, point to Calendar in the main menu.



Understanding the Calendar

The calendar views consist of the actual calendar, plus a number of controls that let you modify your view of the calendar. Actions you can perform from the calendar view include:

- Save and submit your own time off requests
- Unsubmit time off requests that have not yet been approved
- Withdraw approved time off requests
- Submit time off requests on behalf of employees you supervise
- Approve and/or reject time off requests for employees you supervise.

Calendar settings are remembered within the same session. This means that if you navigate to a different area of the application and then return to the calendar, the calendar will appear as it did before.

Navigating the Calendar

This section summarizes how you can control the calendar view.

New Tasks

The [3 new task\(s\)](#) link, in the upper right corner of the screen, indicates that there are new tasks awaiting your attention. Clicking on the link launches a separate window where you can review the new tasks and take action as necessary.

Selection Criteria

The Selection Criteria section allows you to limit the employees shown in the calendar based on specific groups. The selection criteria section is displayed only if the logged in employee's permissions allow access to any of the following:

- Groups
- All Employees
- Administrator


- Supervisor

To use the selection criteria:

1. Expand the Selection Criteria section by clicking the + icon in the **Selection Criteria** section. You can later hide the Selection Criteria by clicking the - icon.
2. Select the appropriate **Reporting Type**. Reporting types determine which employees will be available in the Employees list, which is then used to filter the calendar itself.

Available reporting types are described below, including examples. Use the following scenario when reading the examples provided.

Scenario: You are Doug Brown (the user currently logged in). You (Doug) are the supervisor for Rob Jones. Rob is the supervisor for Sam Pole.

- All Employees
This option includes all employees in the system.
 - Direct & Indirect
This option includes all employees for whom you (Doug Brown) are the supervisor, as well as any subordinates of those employees (i.e., employees reporting to the employees you supervise). Based on the scenario provided, you (Doug Brown), Rob, and Sam will all be included in the Employees list.
 - Direct
This option includes only those employees who report directly to you (meaning the logged in user, who is also included). Based on the scenario provided, only you (Doug) and Rob will be included in the Employees list.
 - Indirect
This option includes only those employees whose supervisors report to you (meaning the logged in user, who is also included). Based on the scenario provided, only you (Doug) and Sam will be included in the Employees list.
3. Each category is displayed above a list box containing the groups associated with that category. You may use groups to locate an employee or multiple employees for whom you want to view time off information. Select the appropriate groups, then click the  button to refresh the Employees list with the employees included in those groups.

4. From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.

The screenshot shows a 'Selection Criteria' dialog box. On the left, under 'ReportingType', there are four radio button options: 'All Employees' (selected), 'Direct & Indirect', 'Direct', and 'Indirect'. In the center, under 'Categories', there are two columns: 'Department' and 'Location'. Each column has a 'Select All | Deselect All' link and a list of items with checkboxes. The Department list includes Administration, Engineering, and Human Resources. The Location list includes Chicago, Los Angeles, and New York. To the right of the categories is a blue '>>' button. On the far right, under 'Employees', there is a 'Select All | Deselect All' link and a list of employee names with checkboxes: Brown, Doug; Green, Sally; Hill, Tom; Jones, Rob; Pole, Sam; and Robbins, Mark. At the bottom left of the dialog is an 'Apply' button.

Note: Your name (i.e., the logged in employee's name) is always included in the Employees list to allow you to view your own time off requests and reports.

Small Calendar

You can use the small calendar at the left side of the screen to modify the time period in view, as follows:

- Select a month and year from the dropdown menus and click Go
- Move forward or backward by month using the and navigation icons
- Jump to a particular week by clicking the corresponding navigation icon
- Jump to a particular date by clicking on that day.

Color Legend

The shading in the calendar, as shown in the legend at the left side of the screen, illustrates the status of employees' time off requests.

Viewing Calendars

To view a specific calendar, point to Calendar in the main menu, and click one of the following links:

Month view

Select Month view to display the View Time Off for the Month calendar, which allows you to see all of your own time off requests, as well as requests for any employees you selected in the Selection Criteria section, for a specific calendar month. For further information about using Selection Criteria, refer to the *Selection Criteria* section earlier in this chapter.

View Time Off for the Month

Logged in as admin
5 new task(s)

Selection Criteria

September 2005

Sep 2005 Go

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28 Sam Pole	29	30	31	1	2	3
4 4	5 5	6 6	7 7	8 8	9 Sally Green Mark Robbins	10
11 11	12 Sally Green Mark Robbins	13 13	14 Frank Young	15 15	16 16	17 17
18 18	19 Doug Brown	20 20	21 21	22 22	23 Doug Brown	24 24
25 25	26 26	27 27	28 Rob Jones	29 29	30 Doug Brown Rob Jones	1 1

Saved/Unsubmitted/Withdrawn
 Submitted
 Approved
 Rejected
 Today
 Holiday/Weekend

Week view

Select Week view to display the View Time Off for the Week calendar, which allows you to see all of your own time off requests, as well as requests for any employees you selected in the Selection Criteria section, for a specific calendar week. For further information about using Selection Criteria, refer to the Selection Criteria section earlier in this chapter.

View Time Off for the Week

Logged in as admin
5 new task(s)

Selection Criteria

09/18/2005 - 09/24/2005

Sep 2005 Go

Sun 18	Mon 19	Tue 20	Wed 21	Thu 22	Fri 23	Sat 24
AM	PM	AM	PM	AM	PM	AM
					Vacation	

Saved/Unsubmitted/Withdrawn
 Submitted
 Approved
 Rejected
 Today
 Holiday/Weekend

Day view

Select Day view to display the View Time Off for the Day calendar, which allows you to see all of your own time off requests, as well as requests for any employees you selected in the Selection Criteria section, for a specific calendar day. For further information about using Selection Criteria, refer to the Selection Criteria section earlier in this chapter.

View Time Off for the Day

Logged in as admin
5 new task(s)

Selection Criteria

09/22/2005

Sep 2005 Go

September 2005

September 2005						
Su	Mo	Tu	We	Th	Fr	Sa
> 28	29	30	31	1	2	3
> 4	5	6	7	8	9	10
> 11	12	13	14	15	16	17
> 18	19	20	21	22	23	24
> 25	26	27	28	29	30	1
> 2	3	4	5	6	7	8

Thursday, September 22, 2005

AM	PM

Legend: Saved/Unsubmitted/Withdrawn, Submitted, Approved, Rejected, Today, Holiday/Weekend


Requesting Time Off

You can request time off and save it in your calendar to submit at a later date. When you submit your time off request, the request appears in your supervisor's calendar. Your supervisor can then approve or reject the request.

Note: You cannot request time off more than two years in the future.

To request time off:

1. Click on the date in the calendar for which you want to request time off. The **Request Time Off** pop-up window is displayed.

4. Position the mouse pointer over the  icon or time off type in the Time Off Status section to display more detailed information about the time off type. The status is based on the current reporting period (typically annual)..

• Days Available as of 01/16/2005:	3
• Earned as of 09/22/2005:	8
• Taken as of 09/22/2005:	3
• Remaining as of 09/22/2005:	8
<hr/>	
• Accrual Monthly on 1st of each month:	1
• To be earned as of 12/31/2005:	3

- **Days Available** is the number of time off days available to the employee as of the start of the current reporting period.
- **Earned** is the number of time off days the employee has earned in addition to the Days Available, as of the end date for the time off request.
- **Taken** is the number of days the employee has taken as of the end date for the time off request.
- **Remaining** is the number of time off days remaining as of the end date of the time off request. Remaining is calculated as follows:
$$(Days\ Available + Earned) - Taken$$
- **Accrual** is the detailed accrual and reset information for the time off type.
- **To be earned** is the projected number of days the employee will earn by the end of the reporting period, if applicable.

***Note:** If the requested time off occurs in the past, current Days Taken and Days Remaining are displayed. If the requested time off occurs in the future, projected Days Taken and Days Remaining are displayed.*

5. Click **Save**, to save the time off request in your calendar, or click **Submit** to submit the time off request for approval. If you want to abort the time off request click **Cancel**.

Searching for an Employee

When creating a time off request, the Employee list contains the names of those employees who report directly to you, as the logged in user. If you need to create a request for an employee whose name is not listed, use the More... option in the Employee drop-down list.

To search for an employee:

1. On the **Request Time Off** screen, click on the **Employee** drop-down list and select the **More...** option. The **Select Employee** pop-up window is displayed.

- Delete
Deletes the time off request from the system. Deleting the request is a permanent action.
- Submit
Submits the time off request (with changes) to the appropriate approver. After submitting the request, it will change colour in the calendar view.
- Cancel
Closes the time off request without saving your changes.

Approving or Rejecting Time Off Requests

If you have approval permissions, you can use the calendar to approve or reject any submitted time off request for the employees you supervise (administrators can approve or reject any time off request, regardless of the employee's supervisor). Submitted time off requests are initially displayed in edit mode, allowing you to modify the request before approving it, if necessary. Once approved, a time off request cannot be modified.

To approve or reject a time off request:

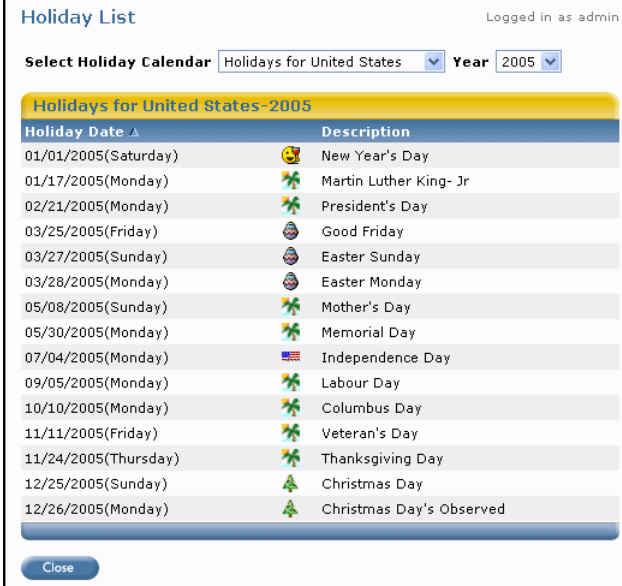
1. Click on the time off request (indicated by the coloured bar) in the calendar.
2. Modify the details of the request, as necessary.
3. Click one of the following buttons to continue:
 - Approve
Approves the request and prevents further modifications.
 - Reject
Rejects the time off request and sends it back to the employee for review.
 - Close
Closes the time off request without taking further action.

Note: *Time off requests can also be approved or rejected from the Approvals menu at the top of the screen.*

Holiday Calendar

To view a list of holidays in the holiday calendar:

1. Point to **Calendar** in the main menu and click **Holiday calendar**.
2. The **Holiday List** displays the list of holidays in your holiday calendar.



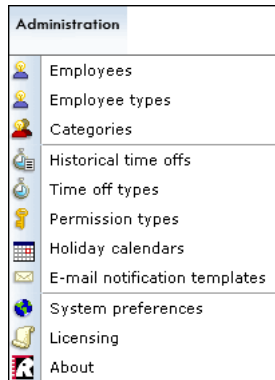
The screenshot shows a web interface titled "Holiday List" with a user logged in as "admin". At the top, there are two dropdown menus: "Select Holiday Calendar" set to "Holidays for United States" and "Year" set to "2005". Below these is a yellow header bar that reads "Holidays for United States-2005". The main content is a table with two columns: "Holiday Date" and "Description". The table lists 13 holidays for the year 2005, each with a date, day of the week, and a small icon representing the holiday. At the bottom of the table is a blue "Close" button.

Holiday Date ▲	Description
01/01/2005(Saturday)	New Year's Day
01/17/2005(Monday)	Martin Luther King- Jr
02/21/2005(Monday)	President's Day
03/25/2005(Friday)	Good Friday
03/27/2005(Sunday)	Easter Sunday
03/28/2005(Monday)	Easter Monday
05/08/2005(Sunday)	Mother's Day
05/30/2005(Monday)	Memorial Day
07/04/2005(Monday)	Independence Day
09/05/2005(Monday)	Labour Day
10/10/2005(Monday)	Columbus Day
11/11/2005(Friday)	Veteran's Day
11/24/2005(Thursday)	Thanksgiving Day
12/25/2005(Sunday)	Christmas Day
12/26/2005(Monday)	Christmas Day's Observed

3. If you want to view a different holiday calendar for a different year, select the **Holiday Calendar** and the **Year** from the drop-down lists.
4. Click **Close** to close the **Holiday List**.

Administration

To drop down the Administration menu, point to Administration in the main menu.



Viewing Employees

To view all available employees:

1. Point to **Administration** in the main menu and click **Employees**.

The screenshot shows the "List Employees" interface. At the top right, it says "Logged in as admin". The interface is divided into several sections:


- Selection Criteria:**
 - ReportingType:** Radio buttons for "All Employees" (selected), "Direct & Indirect", "Direct", and "Indirect".
 - Department:** Checkboxes for "Administration", "Engineering", and "Human Resources".
 - Location:** Checkboxes for "Chicago", "Los Angeles", and "New York".
- Employees:** A list of employees with checkboxes. "Brown, Doug", "Green, Sally", and "Jones, Rob" are checked. "Hill, Tom", "Pole, Sam", and "Robbins, Mark" are unchecked.
- Employee Status:** A dropdown menu set to "Enabled".
- Permission Type:** A dropdown menu set to "All".
- Apply:** A button to apply the filters.

Below the selection criteria is an "Employee List" table:

Menu	First Name	Last Name	User Name	Employee ID	E-mail	Enabled
	Doug	Brown	admin	100	doug@yourcompany.com	Yes
	Rob	Jones	rob	101	rob@yourcompany.com	Yes
	Sally	Green	sally	102	sally@yourcompany.com	Yes

At the bottom of the interface are "Add" and "Import" buttons.

2. To edit an employee, click the icon next to the employee you want to edit, or click on the employee's first or last name. The icon is available only if you have permission to edit employee information (otherwise, it is greyed out).

- Direct
This option includes only those employees who report directly to you (meaning the logged in user, who is also included). Based on the scenario provided, only you (Doug) and Rob will be included in the Employees list.
 - Indirect
This option includes only those employees whose supervisors report to you (meaning the logged in user, who is also included). Based on the scenario provided, only you (Doug) and Sam will be included in the Employees list.
3. Each category is displayed above a list box containing the groups associated with that category. You may use groups to locate an employee or multiple employees for whom you want to view employee information. Select the appropriate groups, then click the  button to refresh the Employees list with the employees included in those groups.

Adding Employees

You can add employees, specify employment information, and assign employees to different groups and permission types.

Tip: Web TimeOff provides default data for permission types, employee types, categories, and time off types. If the default data does not meet your needs, you can modify the defaults or create new data before adding an employee.

To add an employee:

1. Point to **Administration** in the main menu and click **Employees**.

6. To add the employee to existing groups, click the **Assign Groups** tab. To select groups in a specific category, click the + next to the category name. Then select the appropriate groups.

To remove a user from a specific group, clear the check box for that group.

Note: *If you want to assign all groups within a category, select the check box for the category name. Selecting the category name will select all groups associated with that category. Clearing the check box for the category will remove the user from all groups associated with that category.*

The screenshot shows a web interface with a tabbed menu at the top containing 'Permission Types*', 'Assign Groups', 'Time Off', 'E-mail Notifications', and 'Employment Information*'. The 'Assign Groups' tab is active and highlighted in yellow. Below the tab, there are two expandable sections: 'Department' and 'Location', each with a plus sign icon and an unchecked checkbox. At the bottom of the interface, there are three buttons: 'Save', 'Save & Add More', and 'Cancel'.

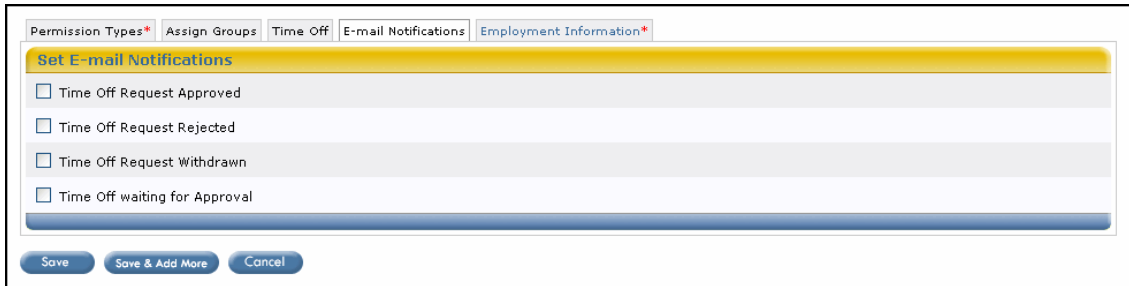
Field	Description
Default Accrue	<p>Accruals provide a means for allowing employees to accumulate time off over a period of time (by time off type), at a frequency set up by the administrator (either globally or per employee). Calculation of earned days starts with the previously defined As Of date (see above), and adds days at the specified frequency.</p> <p>Select the appropriate Default Accrue option for each time off type, as follows:</p> <ul style="list-style-type: none"> • No Accruals If you select No Accruals, then there will be no accrual for the time off type. • Weekly If you select Weekly, then you must select the day, when the accrual should be updated and enter the number of days to be accrued. • Semimonthly If you select Semimonthly, then you must select the dates, when the accrual should be updated and enter the number of days to be accrued. • Monthly If you select Monthly, then you must select the date, when the accrual should be updated and enter the number of days to be accrued. • Yearly If you select Yearly, then you must select the month and date, when the accrual should be updated and enter the number of days to be accrued. <p>Refer to <i>Appendix A: Time Off Scenarios</i> for further information about accruals.</p>

Field	Description
Default Reset	<p>Resets provide a means for resetting the number of time off days to which employees are entitled over a period of time. The time between the reset date and the next reset date is referred to as the reporting period.</p> <p>For example, a company may allow an employee 15 vacation days per year, to be reset (start over) on January 1st each year. In this case, the reporting period is January 1st of this year through December 31st of the same year.</p> <p>The reset frequency may vary by time off type (global) and employee.</p> <p>The available default reset options are:</p> <ul style="list-style-type: none"> • No Reset If you select No Reset, then there will be no reset for the time off type. • Weekly If you select Weekly, then you must select the day, when the reset should be updated and enter the number of days to be reset • Semimonthly If you select Semimonthly, then you must select the dates when, the accrual should be updated and enter the number of days to be reset. • Monthly If you select Monthly, then you must select the date, when the reset should be updated and enter the number of days to be reset. • Yearly If you select Yearly, then you must select the month and date, when the reset should be updated and enter the number of days to be reset.

If an Administrator changes the time off type setting of an employee, the changes will take effect only from the **As Of** date. Example: An employee has been allotted 5 days as **Allowed Day(s), As Of** 1st Jan 2005. if the Administrator changes the **As Of** date to 1st Jan 2006, changes will be implemented only from that date. The changes will not affect the previous settings and calculations.

Refer to *Appendix A: Time Off Scenarios* for a better understanding of time off accruals and resets, and for examples on how best to set up time off types to best meet the needs of your organization.


8. Click the **E-mail Notifications** tab.
9. Select the e-mail notification templates you want to assign to the employee.



10. Click the **Employee Information** tab.



11. Under **Set Employee Information**, enter the following:

- Select the **Employee Type** from the drop-down list (mandatory field).
- Select the employee's **Supervisor** from the drop-down list. (mandatory field). The Supervisor can approve or reject any time off requests submitted by the employee.
Supervisors are identified by their permission types.
- The number of **Hours Per Day** (mandatory field).
- Select the **Date Hired** using the  icon.
- Select the **Holiday Calendar** from the drop-down list.

12. When you are done, click the **Save** button, or click the **Save & Add More** button if you want to add another employee. If you want to abort the employee, click the **Cancel** button.

Importing Employees

If you have a large amount of employee data, you may want to use the Import feature, which allows you to import the employee data into Web TimeOff, thus avoiding manual entry.

Tip: The employee data to be imported must be in the CSV format.

To import employees:

1. Point to **Administration** in the main menu and click **Employees**.
2. On the **List Employee** screen, click the **Import** button. The **Import Employee** screen is displayed.

Import Employees Logged in as admin

Import Employees

Find Import File

[Click here to download sample CSV file](#)

This feature facilitates easy migration of employee data in bulk from your organization's database to Web TimeOff. The data to be imported should be in the CSV file format. Data import CSV file should follow a format which is specified in Online help / User documentation.

3. Click the **Browse** button to locate the CSV file that contains the employee data you want to import. Note that if you're not sure how to format the CSV file, you can view a sample by clicking the link provided. Your own CSV file should be formatted in a similar way as the sample file, to ensure that all data is compatible with the fields in Web TimeOff.

Refer to the *Sample CSV File* section for explanations of the fields in the sample file.

4. Click the **OK** button to begin the import process.

When the import is complete, click the **Log** button to view the list of imported records. The log file gives information about the success or failure of the import action. Refer to the *Special Cases* section for examples and further information about the import process.

5. Click **Cancel** to go to the Employee list screen to view the list of imported employee data.

Special Cases

- **Case 1**

If the license exceeds the number of records to be imported, then all the records are imported, only the number of employees equal to the number of licenses is enabled. The rest of the records are disabled in the application.

- **Case 2**
If an employee reports to Rob and if Rob does not have the approval permission in the application, then during the import process, the employee data imported and is assigned to admin as the 'reporting to' authority (Supervisor).
- **Case 3:** The UserName is the key field which is used to validate the records. During the import process, if a UserName already exists, the application compares and updates each field. If there are any duplicate employee records, the log file displays the record of duplicate data.

Sample CSV File

The following table explains the fields used in the sample file.

Fields	Description
FirstName	The first name of the employee.
LastName	The last name of the employee.
UserName	The user name of the employee.
Password	The password of the employee.
EmailId	The e-mail address of the employee.
Supervisor	The UserName of the supervisor of the employee.
EmployeeType	The employee type assigned to the employee.
DateHired	The joining date of the employee.
Role	The permission type assigned to the employee.
HoursPerDay	The number of hours the employee is entitled to work in a day.
EmployeeId	The employee id of the employee.
Enabled	It indicates the status of activation of the employee information.
TimeOffType1, TimeOffType2, TimeOffType3	The time off types assigned to the employee.
AllowedDays1, AllowedDays2, AllowedDays3	The initial days assigned to the respective time off types.

Fields	Description
DefaultAccrue1, DefaultAccrue2, DefaultAccrue3	The default accrues for the respective time off types.
AccrueOn1, AccrueOn2, AccrueOn3	The dates on which the accruals occur for the respective time off types.
AccrueDays1, AccrueDays2, AccrueDays3	The accrual days for the respective time off types.
DefaultReset1, DefaultReset2, DefaultReset3	The default reset for the respective time off types.
ResetOn1, ResetOn2, ResetOn3	The dates on which the resets occur for the respective time off types.
ResetDays1, ResetDays2, ResetDays3	The reset days for the respective time off types.
Category1, Category2	The categories associated with the employee.
Groups1, Groups2	The groups associated with the respective categories.

Tip: If there are groups like New York, Los Angeles associated with the Category named Department, then they are displayed in the CSV as Department, New York/Los Angeles.

Viewing Employee Types

To view an employee type list:

1. Point to **Administration** in the main menu and click **Employee types**. The **List Employee Types** screen is displayed.

Menu	Name ▲	Description	Enabled
	Administrator	Administrator	Yes
	Consultant	Consultant	Yes
	Contractor	Contractor	Yes
	Full-time Hourly	Full-time Hourly	Yes
	Full-Time Salaried	Full-Time Salaried	Yes
	Part-time Hourly	Part-time Hourly	Yes
	Part-time Salaried	Part-time Salaried	Yes

Add

2. To edit an employee type, click the icon next to the employee type you want to edit.
3. To delete an employee type, click the icon next to the employee type you want to delete. An employee type cannot be deleted if it is assigned to one or more employees.
4. To add an employee type from this screen, click **Add** and follow the instructions in the *Adding Employee Types* section.

Adding Employee Types

To add an employee type:

1. Point to **Administration** in the main menu and click **Employee types**.
2. On the **List Employee Types** screen, click **Add**. The **Add Employee Type** screen is displayed.

Add Employee Type Logged in as admin

** Indicates required fields*

Define Employee Type Details

Name *

Description

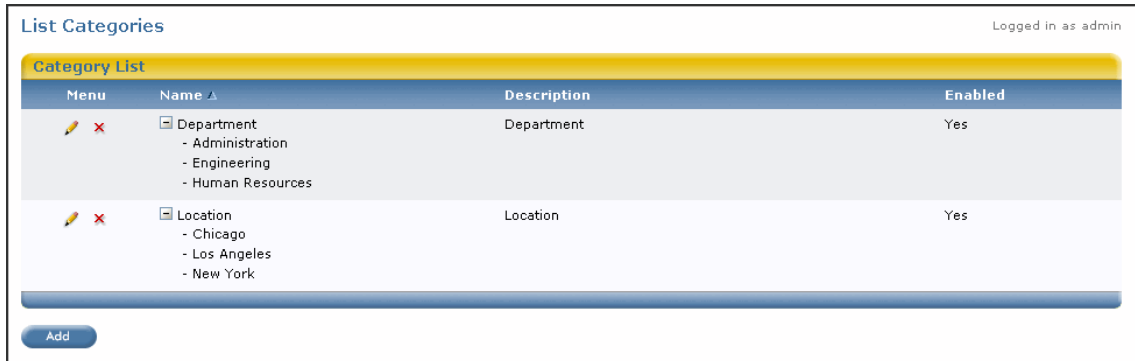
Enabled

3. Under Define Employee Type Details:
 - In the **Name** field, enter a unique name for the employee type.
 - In the **Description** field, enter any text that more clearly explains or defines the employee type.
 - Clear the **Enabled** check box, if you do not want to activate the employee type in the application.
4. When you are done, click the **Save** button to save the employee type. If you want to abort the employee type, click the **Cancel** button.





Viewing Categories

To view a list of categories:



1. Point to **Administration** in the main menu and click **Categories**. The **List Categories** screen is displayed.



The screenshot shows the 'List Categories' interface. At the top right, it says 'Logged in as admin'. Below the title bar, there is a table with the following data:

Menu	Name ▲	Description	Enabled
 	Department <ul style="list-style-type: none">- Administration- Engineering- Human Resources	Department	Yes
 	Location <ul style="list-style-type: none">- Chicago- Los Angeles- New York	Location	Yes

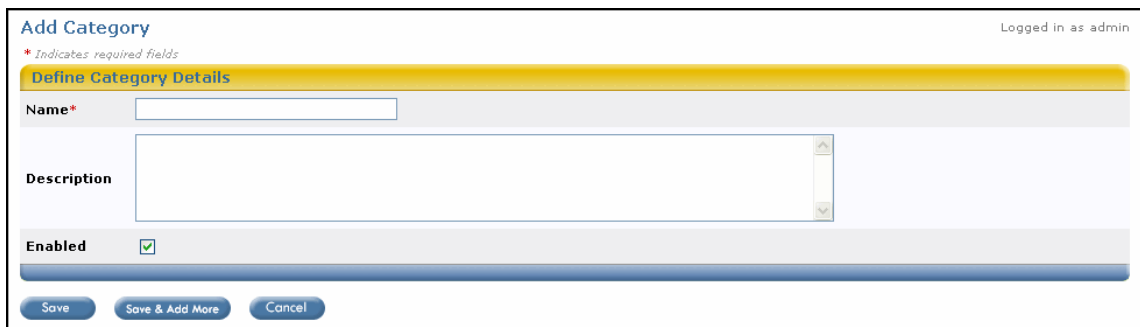
At the bottom left of the table area, there is an 'Add' button.

2. To edit a category or group, click the  icon next to the category you want to edit or click on the name of the category.
3. To delete a category or group, click the  icon next to the category you want to delete.
4. To add a category from this screen, click **Add** and follow the instructions in the *Adding Categories* section.

Adding Categories

To add a category:

1. Point to **Administration** in the main menu and click **Categories**.
2. On the **List Categories** screen, click **Add**. The **Add Category** screen is displayed.



The screenshot shows the 'Add Category' interface. At the top right, it says 'Logged in as admin'. Below the title bar, there is a section titled 'Define Category Details' with the following form fields:

- Name***: A text input field.
- Description**: A text area with a scroll bar.
- Enabled**: A checkbox that is checked.

At the bottom, there are three buttons: 'Save', 'Save & Add More', and 'Cancel'.

3. Enter a unique **Name** (mandatory field) and a **Description** in the respective fields.
4. Clear the **Enabled** check box, if you do not want to activate the category in the application.
5. To save and add more categories, click **Save & Add More**. To abort from adding the category, click **Cancel**.
6. When you are done, click the **Save** button, or click the **Save & Add More** button if you want to add another category. If you want to abort the category, click the **Cancel** button.
7. If you clicked the **Save** button above, the category will be added and a new page will appear allowing you to set up the groups associated with the category.

The screenshot displays the 'Edit Category' interface. At the top, the title 'Edit Category' is on the left, and 'Logged in as admin' is on the right. Below the title bar, there is a header for the category 'Educational Qualifications' with a green checkmark and the text 'Enabled', and an 'Edit' button on the right. A yellow horizontal bar separates this from the 'Groups' section. Under 'Groups', there is a large empty rectangular box for text input. To the right of this box are three buttons: 'Add' (blue), 'Edit' (grey), and 'Delete' (grey). At the bottom left of the main content area, there is an 'OK' button.

8. To add a group, click **Add**. The **Add Group** screen is displayed.

Add Group Logged in as admin

Educational Qualifications Enabled

** Indicates required fields*

Define Group Details

Name*

Description

Enabled

Manage Group Members

Name Contains **Category** -- All -- **Group** -- All --

Available Employees

- Brown, Doug
- Green, Sally
- Hill, Tom
- Jones, Rob
- Pole, Sam
- Robbins, Mark
- Young, Frank

Selected Employees

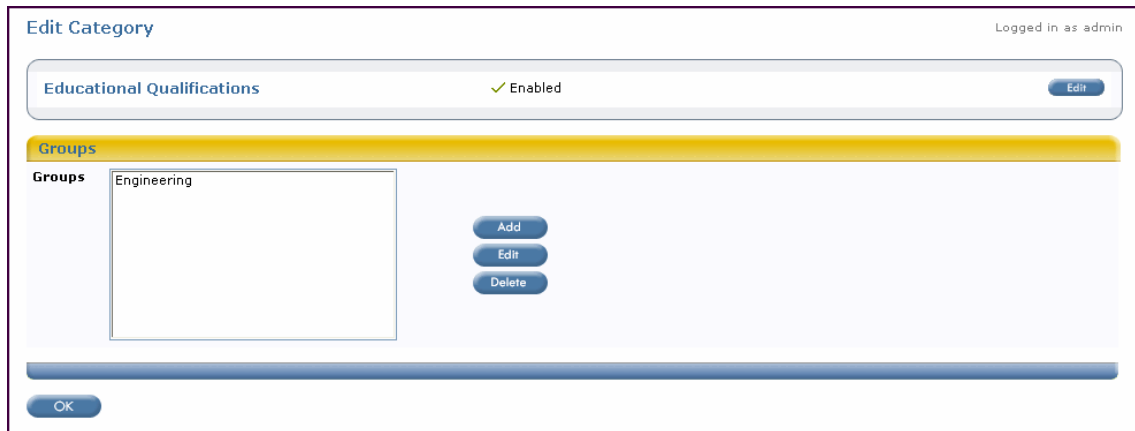
9. Under **Define Group Details**, enter the following:

- In the **Name** field, enter a unique name for the group.
- In the **Description** field, enter any text that more clearly explains or defines the group.
- Clear the **Enabled** check box if you do not want to activate the group in the application.

10. Under **Manage Group Members**, search for specific employees as follows:

- Name of the employee you want to search for in the **Name Contains** field. You enter a whole name or partial name. If you enter a partial name (or a single letter), the search will return all employees having the specified letters in either their first or last names.
- If you want to search for an employee belonging to a specific **Category**, select the category from the drop-down list.
- If you want to search for an employee belonging to a specific **Group**, select the group from the drop-down list.

11. Click **Apply**. Based on the search criteria, the employees are displayed in the **Available Employees** list.
12. Select the employee(s) you want to assign to the group from the **Available Employees** list and click the **>>** button.
13. The selected employee(s) are displayed in the **Selected Employees** list.
To remove an employee from the **Selected Employees** list, select the employee and click the **<<** button.
14. Click **Save** to confirm the addition of the group to the category. The **Edit Category** screen is displayed.



15. If you want to edit a group, select the group from the **Groups** list and click **Edit**.
16. If you want to delete a group, select the group from the **Groups** list and click **Delete**.
17. Click **OK** to go to the **List Categories** screen.

Viewing Historical Time Offs

The Historical Time Offs screen is used to manage all time off requests in the system. Depending on your permissions, you can manage requests for all employees, or only your direct reportees (administrator vs. supervisor access).

To view a list of historical time off requests:

1. Point to **Administration** in the main menu and click **Historical time offs**. The **Historical Time Offs** screen is displayed.

Historical Time Offs Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All
 Administration
 Engineering
 Human Resources

Location
Select All | Deselect All
 Chicago
 Los Angeles
 New York

>>

Employees
Select All | Deselect All
 Brown, Doug
 Green, Sally
 Hill, Tom
 Jones, Rob
 Pole, Sam
 Robbins, Mark

Status All **Time Off Type** All **Employee Status** Enabled

Start Date 09/01/2005 **End Date** 09/30/2005

Apply

Historical Time Offs							
Menu	Employee	Time Off Type	Start Date	End Date	Status	Reporting To	Last Action Date
	<input type="checkbox"/> Brown, Doug	Vacation	09/20/2005	09/21/2005	Approved	Brown, Doug	09/05/2005 12:06:48 PM
	<input type="checkbox"/> Green, Sally	Personal Leave	09/30/2005	10/04/2005	Saved	Brown, Doug	09/05/2005 12:06:48 PM
	<input type="checkbox"/> Jones, Rob	Vacation	09/16/2005	09/20/2005	Submitted	Brown, Doug	09/05/2005 12:06:47 PM

Note: For information on filtering the employees refer to the Selection Criteria section..

2. Under the selection criteria, do the following:

- Select the **Approval Status** from the drop-down list.

The available options are:


- All
- Not Submitted
- Submitted
- Approved
- Rejected
- Select the **Time Off Type** from the drop-down list.
- Select the **Employee Status** from the drop-down list.
- Select the **Start Date** and the **End Date** using the icon.

3. Click **Apply**. The list of historical time off requests is displayed based on the criteria you selected.

4. You can perform the following actions in the historical time off list:

- To submit a time off request, select the check boxes for historical time off requests with an approval status of Not Submitted and click **Submit**.

- To re-open a time off request, select the check boxes for historical time off requests with an approval status of Submitted, Approved, or Rejected and click **Reopen**.
- To approve a time off request, select the check boxes for historical time off requests with an approval status of Submitted or Not Submitted or Rejected, and click **Approve**.
- To reject a time off request, select the check boxes for historical time off requests with an approval status of Submitted or Approved and click **Reject**.
- To delete a time of request, select the historical time off(s) check boxes you want to delete and click **Delete**.

You can also delete a historical time off request by clicking the  icon next to the request.


Note that deleting a time off request is a permanent action and cannot be reversed.


5. When you perform any of the above actions, a confirmation screen is displayed confirming the action. Click **Yes** to confirm the action or click **No** to return to the **Historical Time Offs** screen.

Editing Historical Time Offs

Time off requests with an approval status of Not Submitted or Saved can be modified from the Historical Time Offs screen.

To edit a historical time off request:

1. Click the  icon next to the time off request on the **Historical Time Offs** screen. Note that the time off request must have an approval status of Not Submitted or Saved.
2. On the **View Time Off Request** pop-up window, click the **Edit** button. The **Edit Time Off Request** pop-up window is displayed.



Edit Time Off Request Logged in as admin

[First](#) | [Prev](#) | 14 of 21 | [Next](#) | [Last](#)

Time Off Request Details

Employee Jones, Rob

Time Off Type Vacation

Start Date 09/28/2005 Full Day Off

End Date 09/30/2005 Full Day Off

Notes Personal

[Save](#) [Close](#)

Time Off Status [Refresh](#)

Time Off Type	As Of	Projected Days Taken/Requested	Projected Days Remaining
Vacation	09/30/2005	9	2

Approval History

Employee	Status	Action Date	Approver Comments
Brown, Doug	Saved	09/23/2005 06:22:32 PM	

Note: The navigation control on the top right hand side of the pop-up window allows you to navigate through the list of historical time off requests.

3. Edit the time off request details and click **Save** to save the changes.
4. Click **Refresh** to display the updated time off status.
5. To print the time off request details, click **Print**. The preview of the section to be printed is displayed and can be confirmed by clicking **Print** on the Print screen.
6. To abort from editing the time off request, click **Cancel**.

The Approval History section displays the status of time off request over a period of time.

Note: If the requested time off occurs in the past, current Days Taken and Days Remaining are displayed. If the requested time off occurs in the future, projected Days Taken and Days Remaining are displayed.

Viewing Time off Types

To view the list of time off types:

1. Point to **Administration** in the main menu and click **Time off types**. The **List Time Off Types** screen is displayed.

Time Off Type List			
Menu	Name ▲	Description	Enabled
	Bereavement	Bereavement	Yes
	Family Emergency	Family Emergency	Yes
	Holiday	Holiday	Yes
	Jury Duty	Jury Duty	Yes
	Medical Leave	Medical Leave	Yes
	Personal Leave	Personal Leave	Yes
	Sick	Sick	Yes
	Vacation	Vacation	Yes

Add

2. If you want to edit a time off type, click the icon next to the time off type you want to edit or click the name of the time of type.
3. If you want to delete a time off type, click the icon next to the time off type you want to delete. A time off type cannot be deleted if it used in any time off requests.
4. To add a time off type from this screen, click **Add** and follow the instructions in the section called *Adding Time Off Type*.

Adding Time Off Types

To add a time off type:

1. Point to **Administration** in the main menu and click **Time off types**.
2. On the **List Time Off Types** screen, click **Add**. The **Add Time Off Type** screen is displayed.

The screenshot shows the 'Add Time Off Type' form. At the top right, it says 'Logged in as admin'. Below the title, there is a note: '* Indicates required fields'. The form is divided into sections. The first section is 'Define Time Off Type Details' with a yellow background. It contains the following fields: 'Name *' with a text input field; 'Description' with a text area; 'Track Days Remaining' with an unchecked checkbox; 'Default Accrue' with a dropdown menu showing '-- No Accruals --'; 'Default Reset' with a dropdown menu showing '-- No Reset --'; and 'Enabled' with a checked checkbox. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

3. Under **Define Time Off Type Details**, enter the following:
 - A unique **Name** for the time off type (mandatory field).
 - A **Description** for the time off type.
 - Select the **Track Days Remaining**, if you want the days remaining to be tracked in My Time Off status.
 - Select the **Default Accrue** option from the drop-down list. For information on Default Accrue see “*Default Accrue*”.
 - The available default accrue options are:*
 - No Accruals
 - Weekly
 - Semimonthly
 - Monthly
 - Yearly
 - Select the **Default Reset** option from the drop-down list. For information on Default Reset, see “*Default Reset*”.
 - The available default reset options are:*
 - No Reset
 - Weekly
 - Semimonthly

- Monthly
 - Yearly
 - Clear the **Enabled** check box, if you do not want to activate the time off type in the application.
4. Click **Save**, to save the time off type. If you want to abort from defining this time off type, click **Cancel**.

Note: The settings specified for a time off type become the default settings for that time off type when it is applied to new employees (existing employees retain the settings already set up in their profiles).

For further information about accruals and resets, refer to *Appendix A: Time Off Scenarios*.

Viewing Permission Types

To view the list of permission types:

1. Point to **Administration** in the main menu and click **Permission types**. The **List Permission Types** screen is displayed.

List Permission Types Logged in as admin

Permission Type List			
Menu	Name ▲	Description	Enabled
	Administrator	Administrator	Yes
	Manager	Manager	Yes
	Supervisor	Supervisor	Yes
	Time Off User	Time Off User	Yes

[Add](#)

2. If you want to edit a permission type, click the icon next to the permission type you want to edit or click on the name of the permission type.
3. If you want to delete a permission type, click the icon next to the permission type you want to delete

Note: Permission Type cannot be deleted if it is being used in the application.

4. To add a permission type from this screen, click **Add** and follow the instructions in the section “Adding Permission Types”.

Adding Permission Types

To add a permission type:

1. Point to **Administration** in the main menu and click **Permission types**.
2. On the **List Permission Types** screen, click **Add**. The **Add Permission Type** screen is displayed.

Add Permission Type Logged in as admin

** Indicates required fields*

Define Permission Details

Name *

Description

Enabled

Permission Types | Group Access

Define Actions

Login to the System

Calendar

Administration

Time Off

Organizational Responsibility

Reports

Config

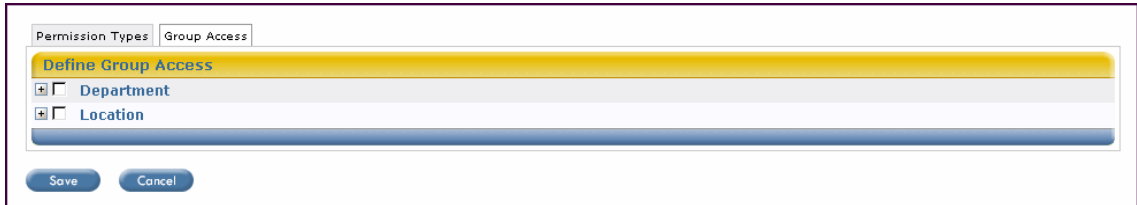
3. Enter a unique **Name** (mandatory field) and a **Description** in the respective fields.
4. Clear the **Enabled** check box, if you do not want to activate the permission type in Web TimeOff system.
5. Under the **Define Actions** section, select the permission type check boxes, you want to associate with the defined permission.

Login to the System and Calendar is always selected as default, enabling the basic action for the permission type.

For the **Administration** action, when you select **Add** or **Edit** or **Delete** options, the **View** option is selected automatically.

For the **Organizational Responsibility** action, if the All Employees access is selected, then the permission allows the employee to request time off(s) for all employees. It will also allow the employee to approve/reject time off requests of all employees except for himself.

6. Click the **Group Access** tab and select the category you want to associate with the defined permission type.

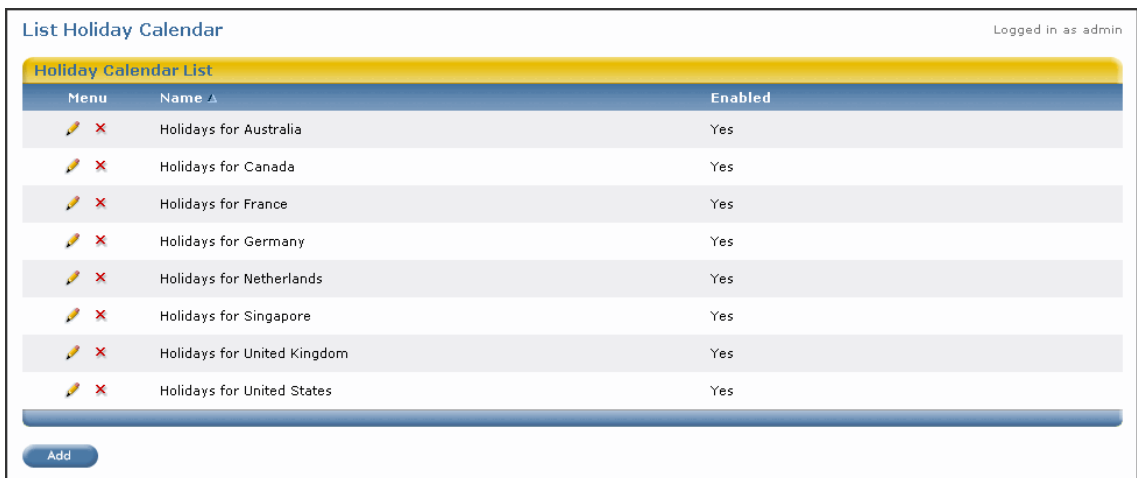


















7. Click **Save** to save the permission type. If you want to abort adding this permission type, click **Cancel**.



Viewing Holiday Calendars

To view a list of holiday calendars:

1. Point to **Administration** in the main menu and click **Holiday calendars**. The **List Holiday Calendar** screen is displayed.



Menu	Name	Enabled
 	Holidays for Australia	Yes
 	Holidays for Canada	Yes
 	Holidays for France	Yes
 	Holidays for Germany	Yes
 	Holidays for Netherlands	Yes
 	Holidays for Singapore	Yes
 	Holidays for United Kingdom	Yes
 	Holidays for United States	Yes

2. If you want to edit a holiday calendar, click the  icon next to the holiday calendar type you want to edit or click on the name of the holiday calendar.
3. To delete a holiday calendar, click the  icon next to the holiday calendar type you want to delete.

Note: *Holiday calendar cannot be deleted if it is used in the application.*

- To add a holiday calendar from this screen, click **Add** and follow the instructions in the section called *Adding Holiday Calendar*.

Adding Holiday Calendar


To add a holiday calendar:

- Point to **Administration** in the main menu and click **Holiday calendars**.
- On the **List Holiday Calendar** screen, click **Add**. The **Add Holiday Calendar** screen is displayed.

The screenshot shows the 'Add Holiday Calendar' form. At the top right, it says 'Logged in as admin'. Below the title, there is a yellow bar with the text 'Define Holiday Calendar Details'. The form includes a 'Name *' field with an asterisk indicating it is required. Below this is a large empty box labeled 'Holiday'. To the right of this box are three buttons: 'Add' (highlighted in blue), 'Edit', and 'Delete'. At the bottom left, there is an 'Enabled' checkbox which is checked. At the very bottom are 'Save' and 'Cancel' buttons.

- Under **Define Holiday Calendar Details**, enter a unique **Name** (mandatory field) for the holiday calendar.
- If you want to add a holiday to your holiday calendar, click **Add**.
- The **Add Holiday** screen is displayed.

The screenshot shows the 'Add Holiday' form. At the top right, it says 'Logged in as admin'. Below the title, there is a yellow bar with the text 'Define Holiday for "Holidays for South Africa"'. The form includes a 'Holiday Date *' field with a calendar icon, an 'Icon' dropdown menu showing 'BoxingDayGiftIcon.gif', and a 'Description *' field. At the bottom are 'OK' and 'Cancel' buttons.

- Under **Define Holiday**, enter the following:
 - Select the **Holiday Date** using  icon (mandatory field).
 - Select an icon from the **Icon** drop-down list.
 - Enter a **Description** of the holiday (mandatory field).
- Click **OK** to go to the **Edit Calendar** screen.

8. If you want to abort adding this holiday, click **Cancel**.
9. The **Edit Holiday Calendar** is displayed.

The screenshot shows the 'Edit Holiday Calendar' interface. At the top right, it says 'Logged in as admin'. Below the title, there is a yellow bar with the text 'Define Holiday Calendar Details'. A red asterisk indicates required fields. The 'Name' field contains 'Holidays for South Africa'. Below it is a 'Holiday' list with one entry: '12/25/2005 - Christmas Day'. To the right of the list are three buttons: 'Add', 'Edit', and 'Delete'. At the bottom left, there is an 'Enabled' checkbox which is checked. At the very bottom, there are 'Save' and 'Cancel' buttons.

10. If you want to add another holiday, click **Add**.
11. If you want to edit a holiday, select the holiday from the **Holiday** list and click **Edit**.
12. If you want to delete a holiday, select the holiday from the **Holiday** list and click **Delete**.
13. Clear the **Enabled** check box, if you do not want to activate the holiday calendar in the application.
14. To save the holiday calendar, click **Save**. If you want to abort from adding this holiday calendar, click **Cancel**.

Special Cases

If a holiday calendar is modified, the changes will have no effect on time off requests that have already been approved. If a time off request has been submitted against the original holiday calendar and not yet approved (i.e., the holiday calendar is modified before the request is approved), Web TimeOff will prompt you to specify whether the request should be approved using the original calendar, or rejected. If you choose to reject the time off request, the employee can still resubmit it, in which case the request will use the modified holiday calendar.

Managing E-mail Notification Templates

To view an e-mail notification templates list:

1. Point to **Administration** in the main menu and click **E-mail notification templates**. The **List E-mail Notification Templates** screen is displayed.

Menu	Description	Enabled
	Approved Time Off	Yes
	Pending Approval	Yes
	Rejected Time Off	Yes
	Welcome	Yes
	Withdrawn Time Off	Yes

2. To edit a template, click the icon next to the template you want to edit. You can also edit an e-mail notification template by clicking on the name of the e-mail notification template. The **Edit E-mail Notification Template** screen is displayed.

* Indicates required fields

Tag	Definition
\$FIRSTNAME	First name
\$LASTNAME	Last name
\$APPROVER	Approver name
\$STARTDATE	Time off request start date
\$ENDDATE	Time off request end date
\$TIMEOFFTYPE	Time off request type
\$URL	URL

- Under **Define E-mail Notification Templates**, if you want to edit the fields, do the following:
 - To edit the **Reply To** e-mail address, enter a valid e-mail address.
 - To edit the subject in the template, enter a **Subject** (mandatory field).
 - Edit the **Body** by referring to the available tags section.
- Click **Save** to save the changes. If you want to restore the default settings, click **Restore Defaults**. If you want to abort from editing the e-mail notification template, click **Cancel**.

Note: E-mail notifications may contain tags that batch information into a list (miniature report) within the e-mail notification. These tags are listed at the bottom of each e-mail notification template with a definition and can be added or removed from a notification, depending on the needs of your organization.

System Preferences

The system preferences are used to set your system parameters, e-mail configuration and holiday calendars.

To define the system preferences:

- Point to **Administration** in the main menu and click **System preferences**. The **System Preferences** screen is displayed.

The screenshot shows the 'System Preferences' interface. At the top right, it says 'Logged in as admin'. Below the title, there is a yellow header bar that says 'Define System Preference Details'. A red asterisk indicates that fields with an asterisk are required. The form contains the following fields:

- Mail Server Type:** A dropdown menu with 'SMTP' selected.
- WTO E-mail Address:** A text input field containing 'noreply@yourcompany.com'.
- Mail Server:** A text input field containing 'localhost'.
- Port:** A text input field containing '25'.
- Holiday Calendar:** A dropdown menu with 'Holidays for Canada' selected.
- Date Format:** A dropdown menu with 'MM/DD/YYYY' selected.
- Records per Page*:** A text input field containing '10'.
- Number of Direct reporting Employees in the drop-down list*:** A text input field containing '50'.

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

- Under **System Preference Details**, enter the following:
 - Select the **Mail Server Type** from the drop-down list.
 - The **WTO E-mail Address**.
 - The **Mail Server**.
 - The **Port** number.
 - Select the **Date Format** from the drop-down list.

- The required number of records you want to display on each page in the **Display Records per Page** field.
- The required number of employees you want to display in the **Number of Direct Reporting Employees** in the drop-down list field.
For more information see “Searching for an Employee”.

Note: The fields, **Date Format** and **Display Records per Page** can be changed at the employee level in the **My Preferences** section. If an Administrator changes the system preference details, the **Date Format** and the **Display Records per Page** for the existing employees will contain the previous data. The change in the **Date Format** and the **Display Records per Page** provide defaults new employees being added.

3. Click **Save** to save the changes.

Adding a License Key

To add a license key:

1. Point to **Administration** in the main menu and click **Licensing**.
2. On the **Find License Field**, enter or browse to the path where the license key is located.
3. Click **Save**.

License Key Management Logged in as admin

Extend License Key

E-mail Address Activation Key

Replace Current License File

Find License File

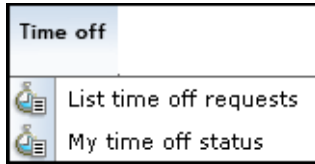
Active License Details

Expires	09/05/2005
Maintenance Agreement Expiry	09/05/2005
Licensed Seats	100
Used Licenses	7
End User License Agreement	<p>SOFTWARE LICENSE AGREEMENT</p> <p>This computer program is protected by copyright and other intellectual property laws and international treaties. Unauthorized reproduction, transmission, de-compiling, translation, reverse engineering, creation of derivative works, copying GUI and/or copyrightable concepts, or distribution</p>

The **Active License Details** section gives information about the license expiration date, the status of the licenses used and the end user license agreement.

Time off

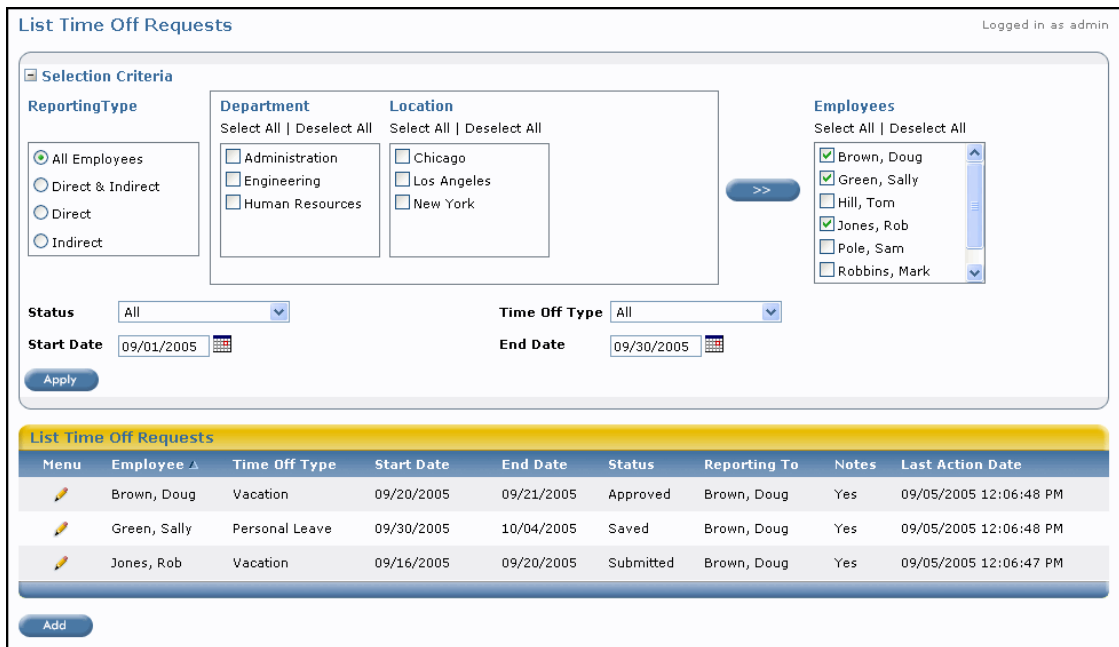
To drop down the time off menu, point to Time off in the main menu.



List Time Off Requests

To view the list of time off requests:

1. Point to **Time off** in the main menu and click **List time off requests**. The **List Time Off Requests** screen is displayed.



List Time Off Requests Logged in as: admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All
 Administration
 Engineering
 Human Resources

Location
Select All | Deselect All
 Chicago
 Los Angeles
 New York

Employees
Select All | Deselect All
 Brown, Doug
 Green, Sally
 Hill, Tom
 Jones, Rob
 Pole, Sam
 Robbins, Mark

Status All
Time Off Type All

Start Date 09/01/2005
End Date 09/30/2005

Apply

List Time Off Requests

Menu	Employee	Time Off Type	Start Date	End Date	Status	Reporting To	Notes	Last Action Date
	Brown, Doug	Vacation	09/20/2005	09/21/2005	Approved	Brown, Doug	Yes	09/05/2005 12:06:48 PM
	Green, Sally	Personal Leave	09/30/2005	10/04/2005	Saved	Brown, Doug	Yes	09/05/2005 12:06:48 PM
	Jones, Rob	Vacation	09/16/2005	09/20/2005	Submitted	Brown, Doug	Yes	09/05/2005 12:06:47 PM

Add


Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.

2. In the selection criteria section, do the following:

- Select the **Approval Status** from the drop-down list.

The approval status options are:

- All

- Not Submitted
 - Submitted
 - Approved
 - Rejected
- Select the **Time Off Type** from the drop-down list.
 - Select the **Start Date** and the **End Date** using the  icon.
3. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.
 4. To add a time off request, click **Add** and see *“Requesting Time Off”*.

Time Off Request Actions

You can perform different actions on a time off request. The different actions performed on a time off request are:

- Edit time off request
- Unsubmit time off request
- Resubmit time off request
- Withdraw time off request


Edit time off request


You can edit a time off request only if the approval status is Saved or Unsubmitted or Withdrawn. The Time off request can be edited from the List Time Off Request screen.

To edit a time off request:

1. Point to **Time off** in the main menu and click **List time off requests**. The **List Time Off Requests** screen is displayed.

Note: *For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.*

2. Select the **Approval Status** and the **Time Off Type** from the drop-down lists.
3. Select **Start Date** and **End Date** using the  icon.
4. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.

- Click the  icon next to the time off request with approval status as Saved or Unsubmitted or Withdrawn. The **Edit Time Off Request** pop-up window is displayed.

Edit Time Off Request Logged in as admin

[First](#) | [Prev](#) | 14 of 21 | [Next](#) | [Last](#)

Time Off Request Details

Employee Jones, Rob


Time Off Type

Start Date

End Date

Notes


Time Off Status

Time Off Type	As Of	Projected Days Taken/Requested	Projected Days Remaining
 Vacation	09/30/2005	9	2

Approval History

Employee	Status	Action Date	Approver Comments
Brown, Doug	Saved	09/23/2005 06:22:32 PM	

Note: The navigation control on the top right hand side of the pop-up window helps you to navigate across the list of time off requests.

- Edit the time off request details.
- If you want to save the time off request, click **Save**.
- If you want to submit the time off request, click **Submit**.
- If you want to delete the time off request, click **Delete**.
- Click **Cancel** to return to the **List Time Off Requests** screen.
- Click **Refresh** to display the updated time off status.
- Position the mouse pointer over the  icon or time off type and it will display the time off information about the time off type. The following information is displayed. For more information, see “*Requesting Time Off*”.

The **Approval History** displays the status of the time off request over a period of time.



Unsubmit Time Off Request

You can unsubmit a time off request only if the approval status is Submitted or Resubmitted. You can unsubmit only your time off request.

To unsubmit a time off request:

1. Point to **Time off** in the main menu and click **List time off requests**. The **List Time Off Requests** screen is displayed.

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”

2. Select the **Approval Status** and the **Time Off Type** from the drop-down lists.
3. Select **Start Date** and **End Date** using the  icon.
4. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.
5. Click the  icon next to the time off request with approval status as Submitted or Resubmitted. The **Submitted Time Off Request** pop-up window is displayed.

Submitted Time Off Request Logged in as rob


[First](#) | [Prev](#) | 2 of 7 | [Next](#) | [Last](#)

Time Off Request Details

Employee Name	Jones, Rob
Time Off Type	Vacation
Start Date	09/14/2005
End Date	09/14/2005
Duration	1
Notes	

[Delete](#) [Unsubmit](#) [Close](#)

Time Off Status


Time Off Type	As Of	Days Taken	Days Remaining
 Vacation	09/14/2005	6	5

Approval History

Employee	Status	Action Date	Approver Comments
Brown, Doug	Submitted	09/22/2005 04:13:01 PM	

Note: The navigation control on the top right hand side of the pop-up window helps you to navigate across the list of time off requests

6. If you want to delete the time off request, click **Delete**.
7. If you want to unsubmit the time off request, click **Unsubmit**.
8. Click **Cancel** to return to the **List Time Offs Requests** screen.
9. Click **Refresh** to display the updated time off status.

10. Position the mouse pointer over the  icon or time off type and it will display the time off information about the time off type. The following information is displayed. For more information, see “*Requesting Time Off*”.

Note: *If the time off exceeds the allotted time off for the respective time off type, the time off status row is displayed in Red.*

The **Approval History** displays the status of the time off request over a period of time.

Resubmit a Time Off Request

You can resubmit a time off request only if the approval status is Rejected or when it is unsubmitted.

To resubmit a time off request:


1. Point to **Time off** in the main menu and click **List time off requests**. The **List Time Off Requests** screen is displayed.

Note: *For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.*

2. Select the **Approval Status** and the **Time Off Type** from the drop-down lists.

3. Select **Start Date** and **End Date** using the  icon.

4. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.

5. Click the  icon next to the time off request with approval status as Rejected or Unsubmitted. The **Edit Time Off Request** pop-up window is displayed

Edit Time Off Request Logged in as rob

[First](#) | [Prev](#) | 2 of 7 | [Next](#) | [Last](#)

Time Off Request Details

Employee Jones, Rob


Time Off Type

Start Date **Full Day Off**

End Date

Notes


Time Off Status

Time Off Type	As Of	Days Taken	Days Remaining
 Vacation	09/14/2005	6	5

Approval History

Employee	Status	Action Date	Approver Comments
Jones, Rob	Unsubmitted	09/23/2005 06:37:15 PM	
Brown, Doug	Submitted	09/22/2005 04:13:01 PM	

Note: The navigation control on the top right hand side of the pop-up window helps you to navigate across list the of time off requests

6. Edit the time off request details.
7. If you want to save the time off request, click **Save**.
8. If you want to delete the time off request, click **Delete**.
9. If you want to resubmit the time off request, click **Resubmit**.
10. Click **Cancel** to return to the **List Time Offs Requests** screen.
11. Position the mouse pointer over the  icon or time off type and it will display the time off information about the time off type. The following information is displayed. For more information, see “Requesting Time Off”.

Note: If the time off exceeds the allotted time off for the respective time off type, the time off status row is displayed in Red.

The **Approval History** displays the status of the time off request over a period of time.



Withdraw Tme Off Request

You can withdraw a time off request only if the approval status is Approved. You can withdraw your time off request, only if you have access to withdraw time off(s). The Administrator or the Supervisor will not be able to withdraw other employee's time off requests.

To withdraw a time off request:

1. Point to **Time off** in the main menu and click **List time off requests**. The **List Time Off Requests** screen is displayed.

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”

2. Select the **Approval Status** and the **Time Off Type** from the drop-down lists.
3. Select **Start Date** and **End Date** using the  icon.
4. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.
5. Click the  icon next to the time off request with approval status as Approved. The **Withdraw Time Off Request** pop-up window is displayed.

Withdraw Time Off Request Logged in as rob


[First](#) | [Prev](#) | 4 of 7 | [Next](#) | [Last](#)

Time Off Request Details

Employee Name	Jones, Rob
Time Off Type	Vacation
Start Date	09/06/2005
End Date	09/06/2005
Duration	1
Notes	

[Withdraw](#) [Close](#)

Time Off Status


Time Off Type	As Of	Days Taken	Days Remaining
 Vacation	09/06/2005	4	7

Approval History

Employee	Status	Action Date	Approver Comments
Brown, Doug	Approved	09/23/2005 11:42:09 AM	
Brown, Doug	Submitted	09/22/2005 04:35:13 PM	

Note: The navigation control on the top right hand side of the pop-up window helps you to navigate across the list of time off requests

6. If you want to delete the time off request, click **Delete**.
7. If you want to unsubmit the time off request, click **Withdraw**.
8. Click **Cancel** to return to the **List Time Offs Requests** screen.
9. Click **Refresh** to display the updated time off status.

10. Position the mouse pointer over the  icon or time off type and it will display the time off information about the time off type. The following information is displayed. For more information, see "Requesting Time Off".

Note: If the time off exceeds the allotted time off for the respective time off type, the time off status row will be displayed in Red.

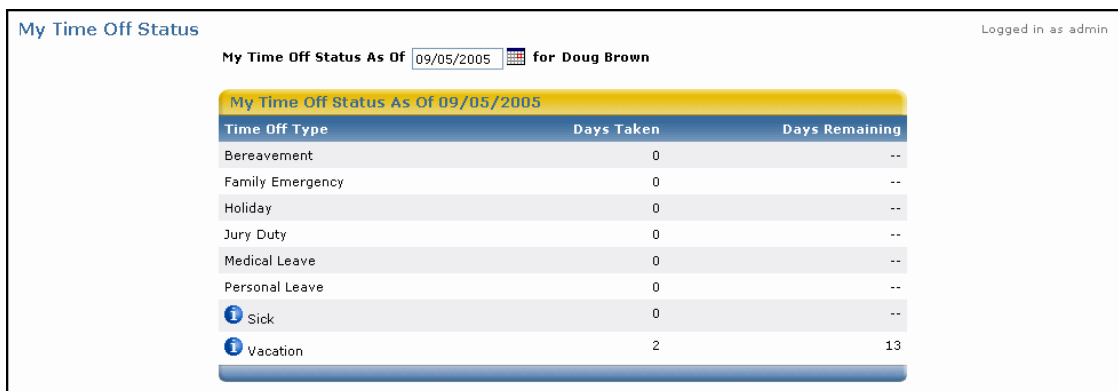
The **Approval History** displays the status of the time off request over a period of time.



My Time Off Status



This section enables you to view your time off status on any date for all applicable time off types.

To view your time off status:

1. Point to **Time Off** in the main menu and click **My time off status**. The **My Time Off Status** screen is displayed.



My Time Off Status As Of 09/05/2005		
Time Off Type	Days Taken	Days Remaining
Bereavement	0	--
Family Emergency	0	--
Holiday	0	--
Jury Duty	0	--
Medical Leave	0	--
Personal Leave	0	--
 Sick	0	--
 Vacation	2	13

2. Select the date using the  icon, if you want to view the time off status for a different date. Click **Refresh**.
3. Position the mouse pointer over the  icon or time off type in the Time Off Status section to display more detailed information about the time off type. The status is based on the current reporting period (typically annual)..

• Days Available as of 01/16/2005:	3
• Earned as of 09/22/2005:	8
• Taken as of 09/22/2005:	3
• Remaining as of 09/22/2005:	8
<hr/>	
• Accrual Monthly on 1st of each month:	1
• To be earned as of 12/31/2005:	3

- **Days Available** is the number of time off days you have available as of the start of the current reporting period.
- **Earned** is the number of time off days you have earned in addition to the Days Available, as of the end date for the time off request.
- **Taken** is the number of days you have taken as of the end date for the time off request.
- **Remaining** is the number of time off days remaining as of the end date of the time off request. Remaining is calculated as follows:

$$(Days\ Available + Earned) - Taken$$
- **Accrual** is the detailed accrual and reset information for the time off type.
- **To be earned** is the projected number of days you will earn by the end of the reporting period, if applicable.

Note: *If the requested time off occurs in the past, current Days Taken and Days Remaining are displayed. If the requested time off occurs in the future, projected Days Taken and Days Remaining are displayed.*

4. Click **Save**, to save the time off request in your calendar, or click **Submit** to submit the time off request for approval. If you want to abort the time off request click **Cancel**.

Approvals

To drop down the approvals menu, point to Approvals in the main menu.



Pending Approvals

To view a list of time off requests pending for approvals:


1. Point to **Approvals** in the main menu and click **Pending approvals**. The **Pending Approvals** screen is displayed.

The screenshot shows the 'Pending Approvals' interface. At the top right, it says 'Logged in as admin'. Below the title, there are 'Selection Criteria' for 'ReportingType', 'Department', 'Location', and 'Employees'. The 'Employees' list includes Brown, Doug; Green, Sally; Hill, Tom; Jones, Rob; Pole, Sam; and Robbins, Mark. Below this is a table of pending approvals with columns for Menu, Employee, Time Off Type, Start Date, End Date, Duration in Day(s), Days Remaining, Notes, and Submitted Date. The table contains four rows of data. At the bottom, there are 'Approve', 'Reject', and 'Cancel' buttons.

Menu	Employee	Time Off Type	Start Date	End Date	Duration in Day(s)	Days Remaining	Notes	Submitted Date
	<input type="checkbox"/> Hill, Tom	Personal Leave	10/05/2005	10/07/2005	3	--	Yes	09/05/2005 12:06:48 PM
	<input type="checkbox"/> Pole, Sam	Vacation	09/23/2005	09/23/2005	1	4	Yes	09/05/2005 12:06:46 PM
	<input type="checkbox"/> Robbins, Mark	Vacation	10/07/2005	10/07/2005	1	3	Yes	09/05/2005 12:06:45 PM
	<input type="checkbox"/> Young, Frank	Vacation	10/14/2005	10/19/2005	4	2	Yes	09/05/2005 12:06:46 PM

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.

2. To approve a time off request, select the time off request you want to approve and click **Approve**.
3. To reject a time off request, select the time off request you want to reject and click **Reject**.

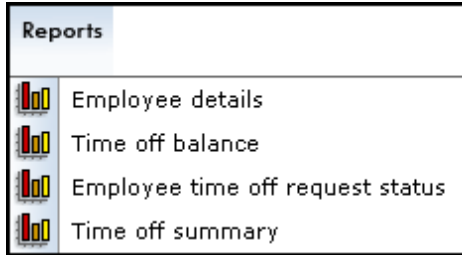
5. Position the mouse pointer over the  icon or time off type and it will display the time off information about the time off type. For more information, see “*Requesting Time Off*”.

Note: *If the requested time off occurs in the past, current Days Taken and Days Remaining are displayed. If the requested time off occurs in the future, projected Days Taken and Days Remaining are displayed.*

The **Approval History** displays the status of the time off request over a period of time.

Reports

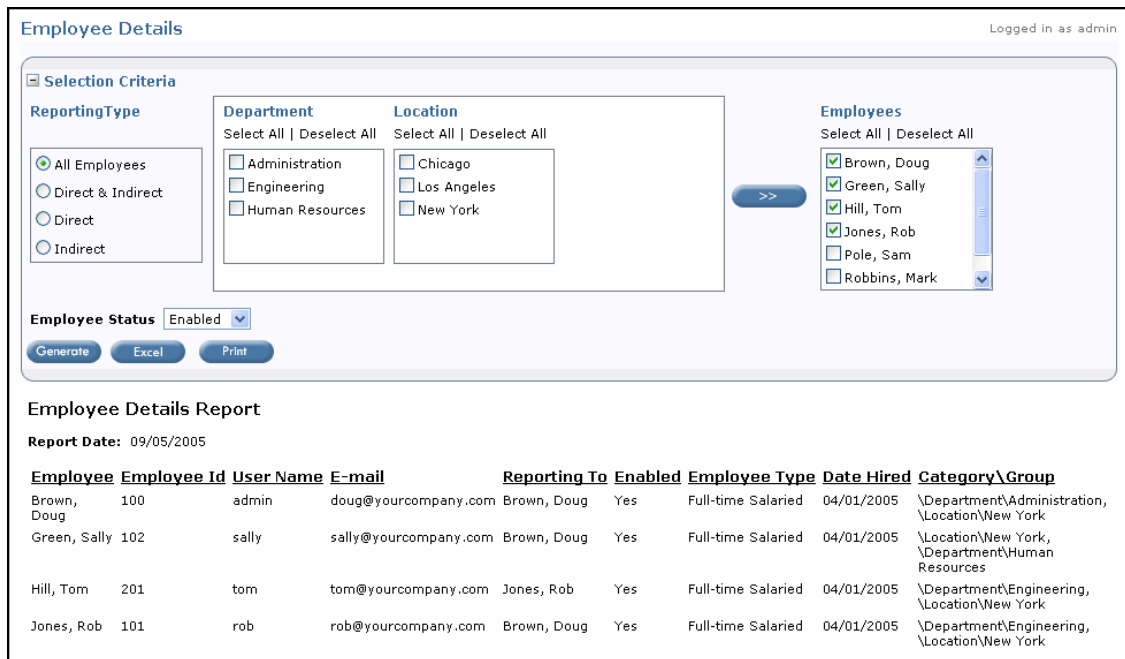
To drop down the reports menu, point to Reports in the main menu.



Employee Details Report

To view an employee details report:

1. Point to **Reports** in the main menu and click **Employee details**. The **Employee Details Report** screen is displayed.



Employee Details Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department Select All | Deselect All

Administration
 Engineering
 Human Resources

Location Select All | Deselect All

Chicago
 Los Angeles
 New York

Employees Select All | Deselect All

Brown, Doug
 Green, Sally
 Hill, Tom
 Jones, Rob
 Pole, Sam
 Robbins, Mark

Employee Status Enabled

Employee Details Report

Report Date: 09/05/2005

<u>Employee</u>	<u>Employee Id</u>	<u>User Name</u>	<u>E-mail</u>	<u>Reporting To</u>	<u>Enabled</u>	<u>Employee Type</u>	<u>Date Hired</u>	<u>Category\Group</u>
Brown, Doug	100	admin	doug@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	04/01/2005	\Department\Administration, \Location\New York
Green, Sally	102	sally	sally@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	04/01/2005	\Location\New York, \Department\Human Resources
Hill, Tom	201	tom	tom@yourcompany.com	Jones, Rob	Yes	Full-time Salaried	04/01/2005	\Department\Engineering, \Location\New York
Jones, Rob	101	rob	rob@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	04/01/2005	\Department\Engineering, \Location\New York

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”

2. To view and generate a report of all the employees whose account is activated in the application, select Enabled in the **Employee Status** option.

3. To view and generate a report with employees who are not enabled in the application, select Disabled in the **Employee Status** option.
4. If you want to view and generate a report with employees who are both enabled and disabled in the application, select Both in the **Employee Status** option.
5. Click **Generate** to view the report.
6. To save the report in the Microsoft Excel format, click **Excel**.
7. To print the report, click **Print**.

Note: *The preview of the section to be printed is displayed and can be confirmed by clicking Print on the Print screen*

Time Off Balance Report

To view time off balance report:

1. Point to **Reports** in the main menu and click **Time off balance**. The **Time Off Balance** screen is displayed.

Time Off Balance Report

As Of Date: 09/30/2005
Report Date: 09/05/2005

<u>Employee</u>	<u>Time Off Type</u>	<u>Projected Days Taken/Requested</u>	<u>Projected Days Remaining</u>
Brown, Doug	Bereavement	0	--
	Family Emergency	0	--
	Holiday	0	--
	Jury Duty	0	--
	Medical Leave	0	--
	Personal Leave	0	--
	Sick	0	5
	Vacation	4	11
Total		4	16
Jones, Rob	Bereavement	0	--
	Family Emergency	0	--
	Holiday	0	--
	Jury Duty	0	--
	Medical Leave	0	--
	Personal Leave	0	--
	Sick	2	3
	Vacation	0	8
Total		2	11

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.

2. Select the **As Of** date using the icon. Select a **Time Off Type** from the drop-down list and click Generate.
3. To save the report in the CSV format, click **Excel**.

4. To print the report, click **Print**.

Note: The preview of the section to be printed is displayed and can be confirmed by clicking **Print** on the **Print** screen.

Employee Time off Request Status

To view an employee time off request status report:

1. Point to **Reports** in the main menu and click **Employee time off request status**. The **Employee Time Off Request Report** screen is displayed.

Employee Time Off Request Status Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All

Administration
 Engineering
 Human Resources

Location
Select All | Deselect All

Chicago
 Los Angeles
 New York

Employees
Select All | Deselect All

Brown, Doug
 Green, Sally
 Hill, Tom
 Jones, Rob
 Pole, Sam
 Robbins, Mark

Status All

Time Off Type All

Start Date 09/01/2005

End Date 09/30/2005

Generate **Excel** **Print**


Employee Time Off Request Status Report

Date Range: 09/01/2005-09/30/2005
Report Date: 09/05/2005

Approval Status: All

<u>Employee</u>	<u>Time Off Type</u>	<u>Requested Start Date</u>	<u>Requested End Date</u>	<u>Requested Duration</u>	<u>Status</u>	<u>Reporting To</u>
Brown, Doug	Vacation	09/20/2005	09/21/2005	2	Approved	Brown, Doug
Hill, Tom	Vacation	09/27/2005	09/29/2005	3	Saved	Jones, Rob
Jones, Rob	Vacation	09/16/2005	09/20/2005	3	Unsubmitted	Brown, Doug

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click **Apply** to refresh the calendar based on the employees you selected.”.

2. Select a **Start Date** and a **End Date** using the  icon and select a **Time Off Type** from the drop-down list and click **Generate**.
3. To save the report in the Microsoft Excel format, click **Excel**.
4. To print the report, click **Print**.

Note: The preview of the section to be printed is displayed and can be confirmed by clicking **Print** on the **Print** screen.

Time off Summary

To view a time off summary report:

1. Point to **Reports** in the main menu and click **Time off summary**. The **Time Off Summary** screen is displayed.

Time Off Summary
Logged in as admin

Selection Criteria

ReportingType

All Employees

Direct & Indirect

Direct

Indirect

Department

Select All | Deselect All

Administration

Engineering

Human Resources

Location

Select All | Deselect All

Chicago

Los Angeles

New York

>>

Employees

Select All | Deselect All

Brown, Doug

Green, Sally

Hill, Tom

Jones, Rob

Pole, Sam

Robbins, Mark


Start Date 09/01/2005 **End Date** 09/30/2005 **Time Off Type** All

Time Off Summary Report

Date Range: 09/01/2005-09/30/2005
Report Date: 09/28/2005

Employee	Time Off Type	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
Brown, Doug	Bereavement	--	--	--	--	0	--
	Family Emergency	--	--	--	--	0	--
	Holiday	--	--	--	--	0	--
	Jury Duty	--	--	--	--	0	--
	Medical Leave	--	--	--	--	0	--
	Personal Leave	--	--	--	--	0	--
	Sick	5	0	0	--	0	5
	Vacation	15	0	0	--	1	14
	Total		20	0	0	--	1
Jones, Rob	Bereavement	--	--	--	--	0	--
	Family Emergency	--	--	--	--	0	--
	Holiday	--	--	--	--	0	--
	Jury Duty	--	--	--	--	0	--
	Medical Leave	--	--	--	--	0	--
	Personal Leave	--	--	--	--	0	--
	Sick	5	0	0	--	0	5
	Vacation	11	0	0	--	2	9
	Total		16	0	0	--	2

Note: For information on filtering the employees see “From the Employees list, select the employees for whom you want to view time off information. Then click Apply to refresh the calendar based on the employees you selected.”.

2. Select a **Start Date** and a **End Date** using the  icon. Select a **Time Off Type** from the drop-down list and click **Generate**.
3. To save the report in the Microsoft Excel format, click **Excel**.

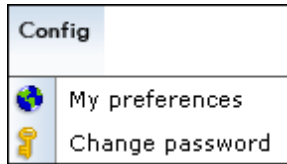
4. To print the report, click **Print**.

Note: *The preview of the section to be printed is displayed and can be confirmed by clicking **Print** on the **Print** screen.*

For detailed information on the fields existing in the report, refer to Appendix A: Time Off Scenarios.

Configuration

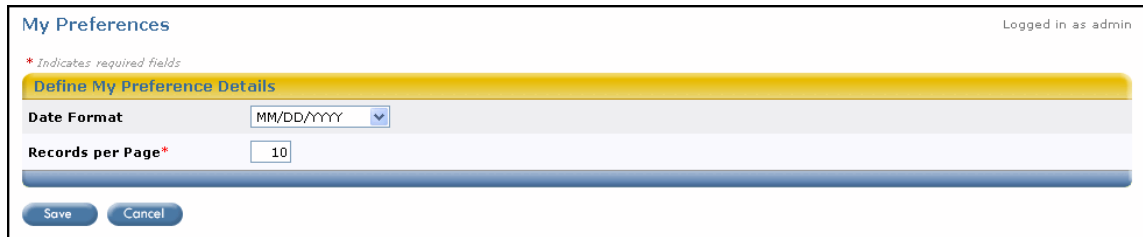
To drop down the configuration menu, point to Configuration in the main menu.



My Preferences

To edit your preferences:

1. Point to **Config** in the main menu and click **My preferences**. The **My Preferences** screen is displayed.

A screenshot of the 'My Preferences' web interface. The page title is 'My Preferences' and it shows 'Logged in as admin'. A yellow banner reads 'Define My Preference Details'. Below this are two fields: 'Date Format' with a dropdown menu showing 'MM/DD/YYYY' and 'Records per Page*' with a text input field containing '10'. At the bottom are 'Save' and 'Cancel' buttons.

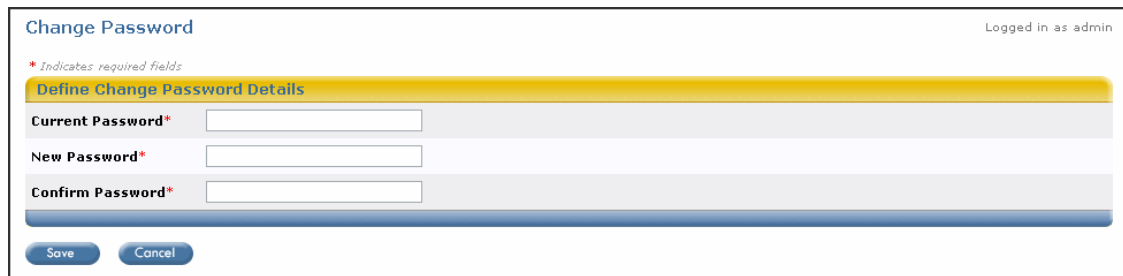
2. Select the **Date Format** from the drop-down list and enter the required number in the **Display Records per Page** field.
3. Click **Save** to save the changes.

Note: *The changes in the My Preferences section, will override the system settings.*

Change Password

To change your password:

1. Point to **Config** in the main menu and click **Change password**. The **Change Password** screen is displayed.



The screenshot shows a web form titled "Change Password" in the top left corner. In the top right corner, it says "Logged in as admin". Below the title, there is a red asterisk followed by the text "* Indicates required fields". A yellow header bar contains the text "Define Change Password Details". Below this header, there are three input fields: "Current Password*", "New Password*", and "Confirm Password*", each with a red asterisk. At the bottom of the form, there are two buttons: "Save" and "Cancel".

2. Enter the existing password in the **Current Password** (mandatory field).
3. Enter the new password in the **New Password** (mandatory field).
4. Reenter the new password in the **Re-type Password** (mandatory field).
5. Click **Save** to save the changes.
6. Click **Cancel** to abort from saving the changes.



Appendix A: Time Off Scenarios

The Time off scenarios are used to explain the different scenarios of time off(s) and the calculation of remaining days. The days remaining is displayed in the My Time Off Status menu and also in the Time Off Summary Report.

Note: *Accruals do not accumulate and resets do not occur in the past (i.e., they are not retroactive). This means that if you are implementing accruals on June 1st, for example, you should set up the Allowed days to include all accrued days up to June 1st, and begin the accruals on or after June 1st. The reset date should occur on or after June 1st, as well. The allowed days, accruals and the reset is configured by the administrator of the application.*

To understand the scenarios, you should understand the following concepts:

- **Initial Balance:** Allowed days are the initial number of days given to the employee at the start of the first reset (reporting) period.
- **Accrued Days:** The accrued days are the number of days earned over a period of time. The period can be weekly or monthly or semimonthly or half yearly or yearly, depending on the time off type.
- **Reset Gained:** The reset gained is the number of days gained by the employee when the reset occurs, usually determined by the reset amount.
- **Reset Lost:** The reset lost is the number of days lost by the employee when the reset occurs, usually determined by the number of days remaining that were lost when the employee's time off was reset.
- **Days Remaining:** The days remaining is calculated using the given formula:
$$\text{Days Remaining} = (\text{Initial Balance} + \text{Accrued Days} + \text{Reset Gained}) - (\text{Days Taken} + \text{Reset Lost})$$

To explain the scenarios, the following sample data is used:

- Joining date of John Smith - 10th June 2005
- Allowed Days as of 10th June - 12 days
- Monthly Accrual on 9th of every month - 1 day
- Yearly Reset on 10th June - 5 days

- **Scenario 1:**

John submitted a time off request for 20th June and 21st June 2005 and it was approved on 21st June 2005. The time off summary report will contain the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2005 - 06/30/2005	0	0	12	0	2	10

- **Scenario 2: Time off is withdrawn after the End Date of time off**

John submitted a time off request for 20th June and 21st June 2005 and it was approved on 21st June 2005. He withdraws (a time off can be withdrawn only after the time off is approved) the time off request on 23rd June 2005. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2005 - 06/30/2005	0	0	12	0	0	12

- **Scenario 3:**

John submitted a time off request for 21st June 2005 and 22nd June 2005 on 10th June 2005. Before the time off was approved, John unsubmitted the time off on 15th June 2005. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2005-06/30/2005	0	0	12	0	0	12

- **Scenario 4: Time off is withdrawn before the end of time off**

John submitted a time off request for the period 21st June 2005 - 24th June 2005. He withdraws the approved time off on 23rd June. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2005-06/30/2005	0	0	12	0	0	12

- **Scenario 5:**

John submitted a time off request for the period 21st June 2005 - 24th June 2005. The time off is approved. The time off summary report will contain the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2005-06/30/2005	0	0	12	0	4	8

Scenario 6: Time off with accrual

John submitted a time off request for the period 21st June 2005 - 24th June 2005. He withdraws the time off request on 23rd June 2005. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/10/2005-07/30/2005	0	0	12	1	0	13

As John has withdrawn the time off, the time off taken is 0. But as the report is generated on 10th July, he is entitled to 1 day of accrual which occurs on 9th of every month.

- **Scenario 7: Time off with accrual and reset**

John submitted a time off request for 21st June 2006. The report is generated for the duration of 1st June 2006 to 30th June 2006 on 10th July 2006. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2006-06/30/2006	18	19	5	1	1	4

A reset occurs on 10th June 2006, the initial balance (Allowed days) will be 18. Initial Balance=[12(Initial balance of previous year)+11 (accrued days)-5(time off taken for the year 2005)]=18.

- **Scenario 8: Another case of Accruals and Resets**

John submitted a time off request for the period 29th June 2006 and 2nd July 2006 and it is approved. The report is generated on 11th June 2006 and it contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2006-06/30/2006	18	19	5	1	2	3

The initial balance is 18 as explained in Scenario 7. Accrued days is 1. Time off taken till 30th June 2006 is 2, because the period of the report is till 30th June only. Reset gained and reset lost remains the same as in Scenario 7.

- **Scenario 9: Another case of Accruals and Resets**

John submitted a time off for the period 29th June 2006 and 2nd July 2006. A reset occurs on 10th June. John withdrew the time off on 30th June 2006. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/01/2006-06/30/2006	18	19	5	1	0	5

- **Scenario 10:**

John submitted a time off request for the period between 1st June 2006 - 4th June 2006. He withdraws the time off on 12th June. The report is generated for the period 22nd June 2005 to 30th June 2006. The time off summary report contains the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/22/2005-06/30/2006	12	29	12	12	4	7

As of 22nd June 2005, the initial balance is 12. Accrued days are counted from June 2005 to June 2006 and it is 12 days. As there was a reset of 5 days and initial balance is 7, then the reset gained will be $7+5=12$. The reset lost will be the sum of the initial balance, accrued days and reset days. Reset days are counted as the initial balance which override the reset account. If the initial balance (allowed days) is configured, then reset number of days (reset gain) will also be lost.

- **Scenario 11:**

As the joining date of John is 10th June 2005, and as of 10th June, the allowed days (initial balance) is 12. The administrator edits John's time off information. The administrator configures the allowed days to be 10 as of 11th June 2005, the reset is 5 days on 29th June 200 and weekly accrual of 1.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
06/10/2005-06/30/2005	12	0	3	15	25	5

As John has not taken any time off, the time off taken is 0. The total accrued days is 3. Reset gained is 15 [10 (initial balance) + 5 (reset days)]. The reset lost is 25 [12 (initial balance) + 3 (accrued days) + 10 (initial balance)].

- **Scenario 12:**

For this scenario, the yearly reset is 5 days, occurring on 6th July. There are no accruals for this scenario.

As the joining date of John is 10th June 2005, and as of 10th June, the allowed days (initial balance) is 12. John submits a time off request for the period between 5th July 2005 and 8th July 2005. Since there's a reset in between the Time off dates, Days Taken will be calculated from the reset date. So, the values will be - Duration is 4 days and Days Taken is 3. The Time off summary report will contain the following data.

Date Range	Initial Balance	Reset Lost	Reset Gained	Accrued Days	Days Taken	Days Remaining
07/01/2005-07/30/2005	12	11	5	0	4	2

Appendix B

Sample Data

The sample data is available only for the demonstration version of Web TimeOff. The sample data is used to make it easier for you to evaluate and understand Web TimeOff. Hence to enable the end user to understand the application.

Web Time Off has created a sample data with a definite organization structure with fixed workflow and realistic parameters defined.

Nebula Inc. is a fictitious company having 7 employees and the following parameters are defined:

- Employee list
- Time off types

- Employee types
- Holiday Calendars
- Permission types
- E-mail notification templates
- Categories
- Sample time offs
- Time off requests for all employees

Employee List:

- Doug Brown
- Rob Jones
- Sally Green
- Mark Robbins
- Tom Hill
- Sam Pole
- Frank Young

Doug and Rob are the most senior employees in the company. As mentioned earlier, there exists a definite approval cycle for the time off requests in the company.

Doug and Rob are considered the 'reporting to' authority, that is the employees report to either Doug or Rob. When an employee submits a time off request, it should be approved by the respective 'reporting to' authority of the employee.

The following table displays the employees with the respective reporting to authority:

Employee	Reporting to
Doug Brown	Doug Brown
Rob Jones	Doug Brown
Sally Green	Doug Brown
Mark Robbins	Rob Jones
Tom Hill	Rob Jones
Sam Pole	Rob Jones
Frank Young	Doug Brown

Time Off Types:

The time off types are enabled for all employees. Depending on the employees, the time off types with allowed days, accrues and resets are assigned.

The time off types list is as follows:

- Bereavement
- Family emergency
- Jury duty
- Medical leave
- Personal leave
- Sick
- Vacation

Employee Type List:

The employee type list is as follows:

- Consultant
- Contractor
- Full-time hourly
- Full-time salaried
- Part-time hourly
- Part-time salaried

All the employees of Nebula Inc. are Full-time salaried.

Holiday Calendars:

The Holiday Calendar for United States is the default holiday calendar assigned to all the employees of Nebula Inc. The holiday calendars defined are:

- Holiday for Australia
- Holiday for Canada
- Holiday for France
- Holiday for Germany
- Holiday for Netherlands
- Holiday for Singapore
- Holiday for United Kingdom
- Holiday for United States

Permission Types:

There are four permission types defined, they are:

- Administrator
- Manager
- Supervisor
- Time Off User

The following is the list of permission types assigned to the employees of Nebula Inc.

Employee	Permission Type
Doug Brown	Administrator
Rob Jones	Supervisor
Sally Green	Manager
Mark Robbins	Time Off user
Tom Hill	Time Off user
Sam Pole	Time Off user
Frank Young	Time Off user

E-mail Notification Templates:

The e-mail notifications can be edited but cannot be added/deleted. The standard following e-mail notification templates are defined:

- Welcome mail
- Time off request approved
- Time off request rejected
- Time off request waiting for approval.
- Time off request withdrawn

The following is the default e-mail notification templates assigned to the employees of Nebula Inc. in addition to the Welcome mail which is assigned to all employees.

Employee	E-mail Notification Template
Doug Brown	Approved Time off, Rejected Time off, Withdrawn Time off, Pending Approval
Rob Jones	Approved Time off, Rejected Time off, Withdrawn Time off, Pending Approval
Sally Green	Approved Time off, Rejected Time off

Employee	E-mail Notification Template
Mark Robbins	Approved Time off, Rejected Time off
Tom Hill	Approved Time off, Rejected Time off
Sam Pole	Approved Time off, Rejected Time off
Frank Young	Time Off user

Categories:

There are two categories, each containing groups. The following categories are defined along with the groups:

- Department
 - Administration
 - Engineering
 - Human Resources
- Location
 - Chicago
 - Los Angeles
 - New York

There will be no categories/groups associated for the employees having permission type named Time Off User. The following is the list of categories and groups assigned to the employees of Nebula Inc.

Employee	Category	Groups
Doug Brown	Department, Location	Administrator, New York
Rob Jones	Department, Location	Engineering, New York
Sally Green	Department, Location	Human Resource, New York
Mark Robbins	N/A	N/A
Tom Hill	N/A	N/A
Sam Pole	N/A	N/A
Frank Young	N/A	N/A

Employees Mark Robbins, Tom Hill and Sam Pole do not have any category/group access because their permission type is Time Off User.

Sample Time Off Types:

All the default time off types are assigned to the employees, but only Vacation, Sick and Personal Leave are used for time off requests. Doug and Rob are the senior most in the company, hence the time off settings are different from the other employees.

- Doug and Rob can take any number of sick leaves. They do not have any allowed/accrued days for sick leave.
- The joining date of all employees is given as six months prior to the installation of the application that is, the first working day of that month.
- Default accrual occurs on the first of every month for Vacation for all employees except Doug and Rob.
- Default reset is yearly and it occurs on the 1st of January.

The following is the list of default accruals and default resets associated with the employees of Nebula Inc.

Employee	Allowed Days	Accrues (Monthly)	Resets (Yearly)
Doug Brown	Vacation -15	N/A	Vacation -0
Rob Jones	Vacation -3	Vacation - 1	Vacation -0
Sally Green	Vacation - 0, Sick - 3	Vacation - 1	Vacation -0, Sick -3
Mark Robbins	Vacation - 0, Sick - 3	Vacation - 1	Vacation -0, Sick -3
Tom Hill	Vacation - 0, Sick - 3	Vacation - 1	Vacation -0, Sick -3
Sam Pole	Vacation - 0, Sick - 3	Vacation - 1	Vacation -0, Sick -3
Frank Young	Vacation - 0, Sick - 3	Vacation - 1	Vacation -0, Sick -3