Web TimeOff Management Implementation Guide

***from* REPLICON**

version 1.1

Copyright

Contacting Replicon

Replicon, Inc.
800, 910 - 7th Ave. S.W.
Calgary, AB. Canada. T2P 3N8

Telephone: 1-403-262-6519
Toll Free (North America) 877-737-5420 ext 3
Toll-Free (Europe) 00-800-7375-4266 ext 3
Toll-Free (Australia/New Zealand) 011-800-7375-4266 ext 3

info@replicon.com

Contents

Chapter 1
About Web TimeOff

Web TimeOff is a web-based absence tracking application that is designed to define and manage time off for the employees in an organization. Web TimeOff does this by letting you define employee types, permission types, categories and holiday calendars.

With Web TimeOff, you can request time off and view the list of time off requests which require approvals. Using the calendar views, you can review the time off status for a single employee, or your entire team, depending on your login permissions.

Web TimeOff also includes predefined reports that enable you to gain visibility into time off accruals,employee time off status, and employee details.

Web TimeOff Concepts

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

- Calendar

  The Calendar is a dashboard which will display your time off status or the time off status of your team. If you are an administrator, manager or approver, you will have two tabs available to you - Shared Calendar and Approval Calendar. The Approval Calendar will allow you to view the time off requests of you and your team, as well as the time off requests that have already been approved, rejected or withdrawn. The Shared Calendar will show the status of your time off requests, and depending on your group settings, the approved time off of other employees in your department.

  If you are an employee with time off user permission, you will only see the status of your time off requests, and depending on your group settings, the approved time off of other employees in your department.

- 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 screeens 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.

Chapter 2
Getting Started

This chapter explains how to install Web TimeOff.

Web TimeOff Versions

Web TimeOff is available from Replicon in the following versions:

Demonstration Version

The demonstration version is designed to let you evaluate the application using easy-to-install procedures on a minimum hardware configuration (see the hardware requirements section that follows). This version has the following features:

- It does not require a pre-installed web server or a database
- It is limited to 10 users
- It has a 14 days time-limited license
- It includes sample data to make your evaluation easier
- You can migrate any data to the full version later if you require
- If you choose to migrate to the full version after you have evaluated the demonstration version, you must purchase and install the software for the full version.

Full Version

The full version has the following features:

- It requires a database to be pre-installed
- It requires Internet Information Services (IIS) to be pre-installed
- It supports a larger number of users
- It does not have sample data

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 Pentium 500 MHz 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 Pentium 500 MHz 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.

Requirements	
Under 50 users	• PC with Pentium 500 MHz CPU or equivalent • 1GB memory • 50MB available disk space
50 to 200 users	• PC with Pentium 1GHz CPU or equivalent • 1GB memory • 50MB available disk space
200 + users	• 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.

Requirements	
Under 50 users	• PC with Pentium 500 MHz CPU or equivalent • 1GB memory • 50MB available disk space
50 to 200 users	• PC with Pentium 1GHz CPU or equivalent • 1GB memory • 50MB available disk space
200 + users	• 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 Pentium 500 MHz 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.

- If you are using Internet Explorer, click **Tools**>**Internet Options**>**Advanced** and select the check box for **Print Background Colors and Images**. This ensures the best results when printing.

Installing Web TimeOff

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

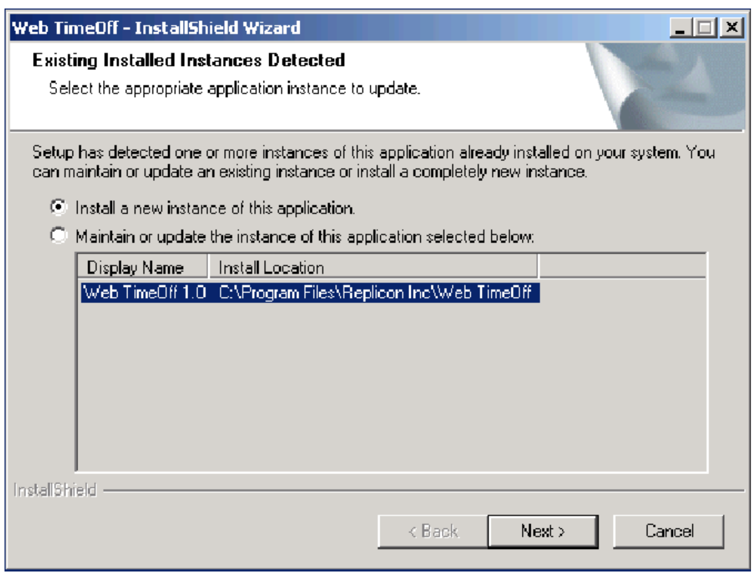
You can either download the installation program to your local computer, or you can run the installation over the internet. Your choice will depend on where you are planning to install the application, and the speed of your connection.

Installing Over a Previous Version

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

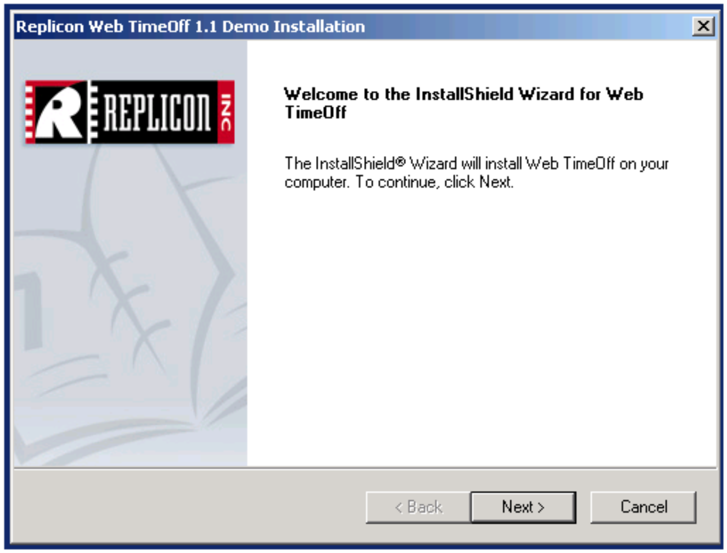


Installing the Demonstration Version

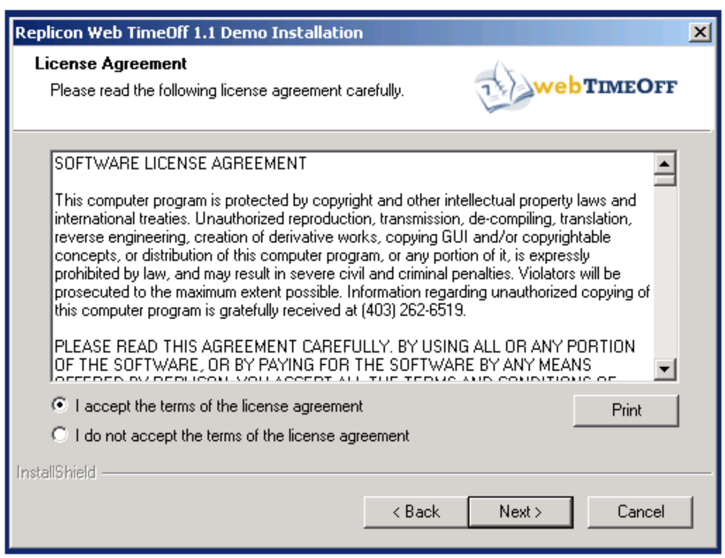
You can install the Demonstration version as follows:

1. Run the installation program.

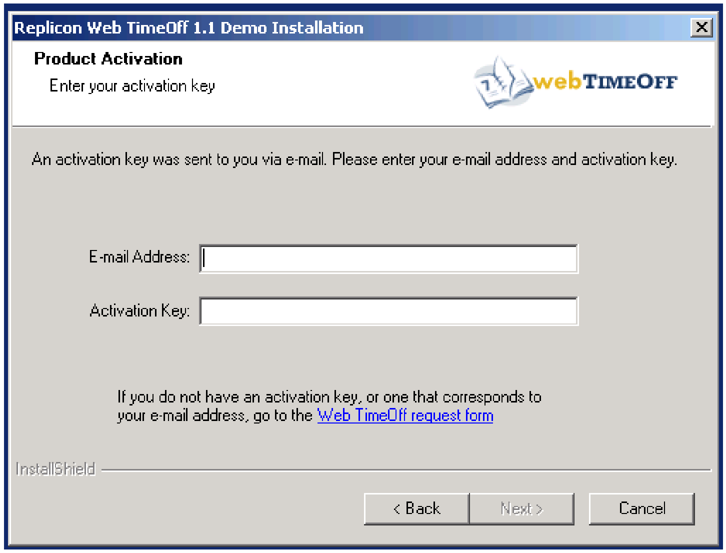
   The **Welcome** screen is displayed. Click **Next**.



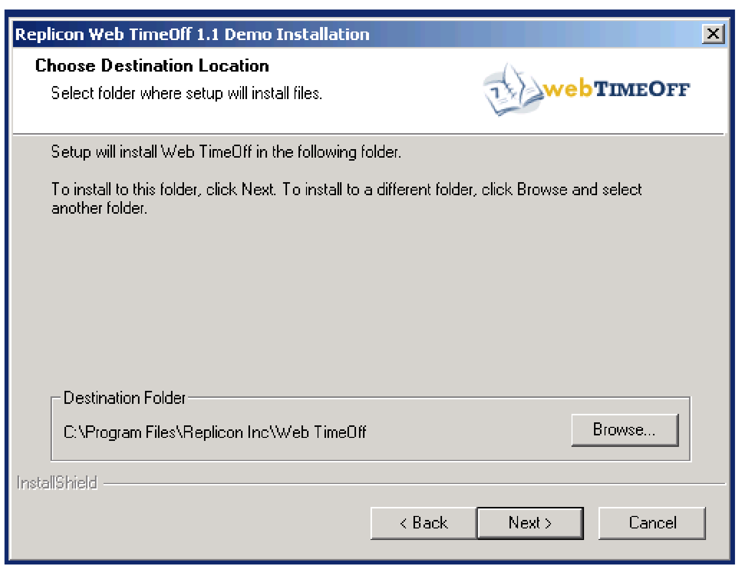
2. Read the license agreement. If you agree to the terms, select the "*I accept...*" option and click **Next**.



3. Enter your e-mail address and the activation key you received from Replicon. (the e-mail address must be associated with the activation key). Click **Next**.

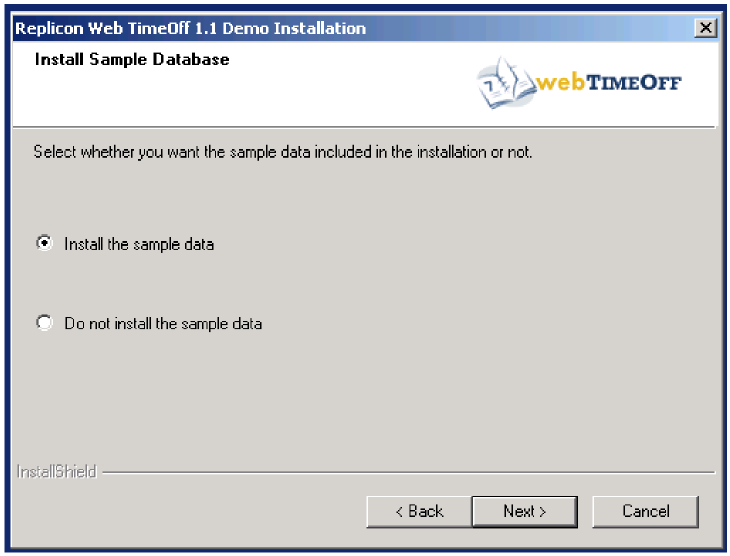


***Note**: If you do not have an activation key, click the **Web TimeOff request form** link, and enter the details. The activation key will be sent to your e-mail address.*

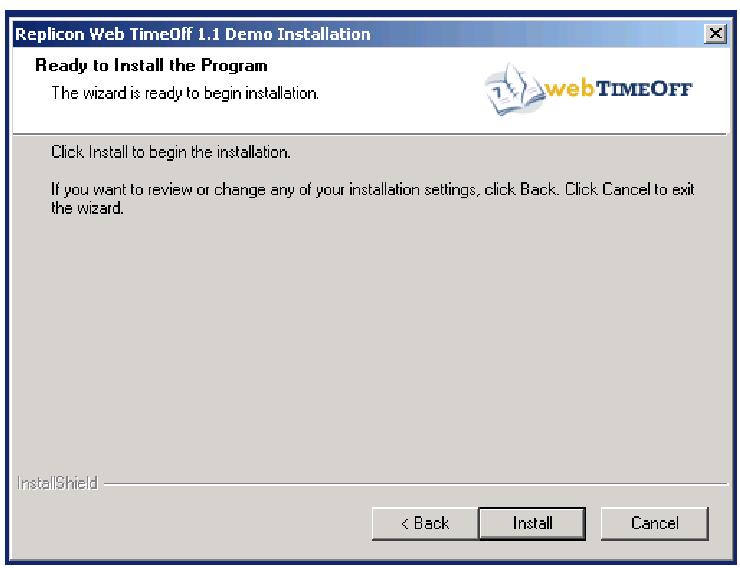


4. Web TimeOff can be installed with a sample database that contains information necessary to thoroughly evaluate the application. The sample database allows you to avoid time-consuming administrative tasks such as defining users, setting up holiday calendars, and customizing your system configuration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

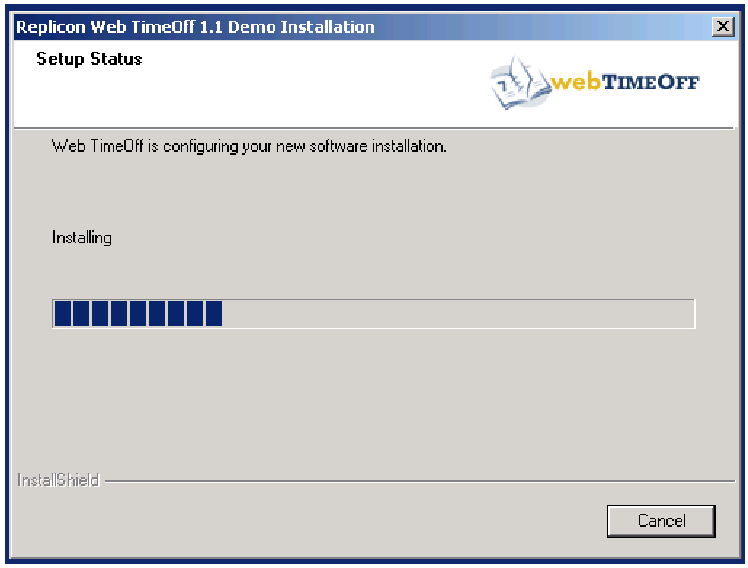
   Choose whether you want to install the sample data, then click **Next**.

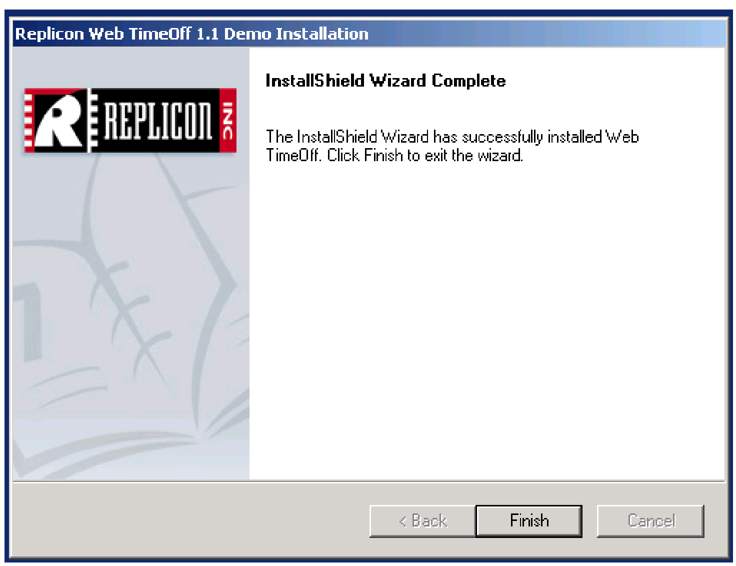
5. You are ready to install the software. Click **Install**..

6. Wait for the software to be installed..



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



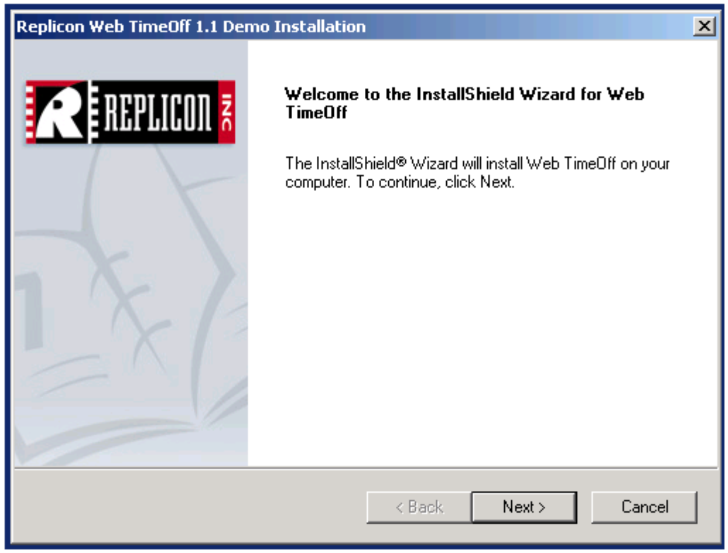
8. The Web TimeOff software login screen will open in a browser. For more information on what to do next, go to the *Logging in for the First Time* section later in this document.

Installing the Full Version

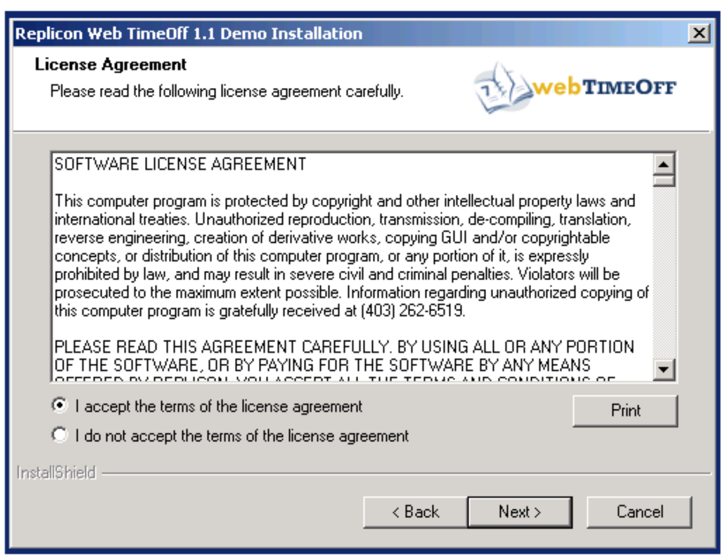
You can install the full version as follows.

1. Run the installation program.

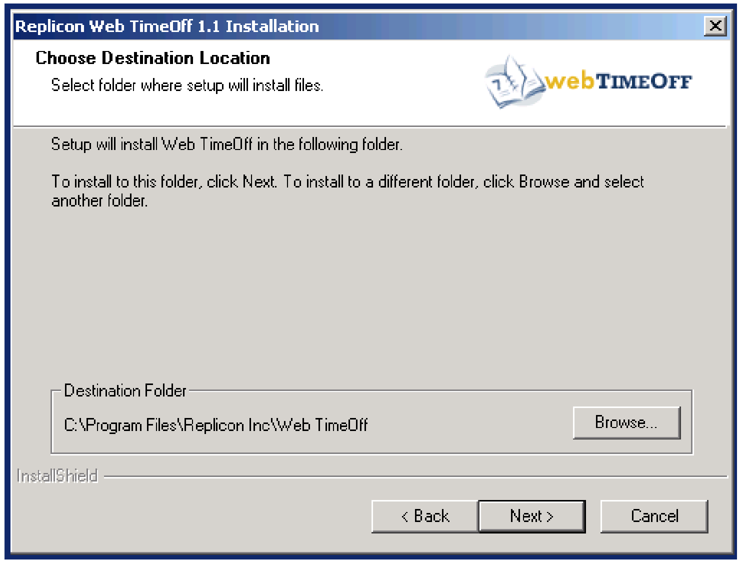
   The Welcome screen is displayed. Click **Next.**



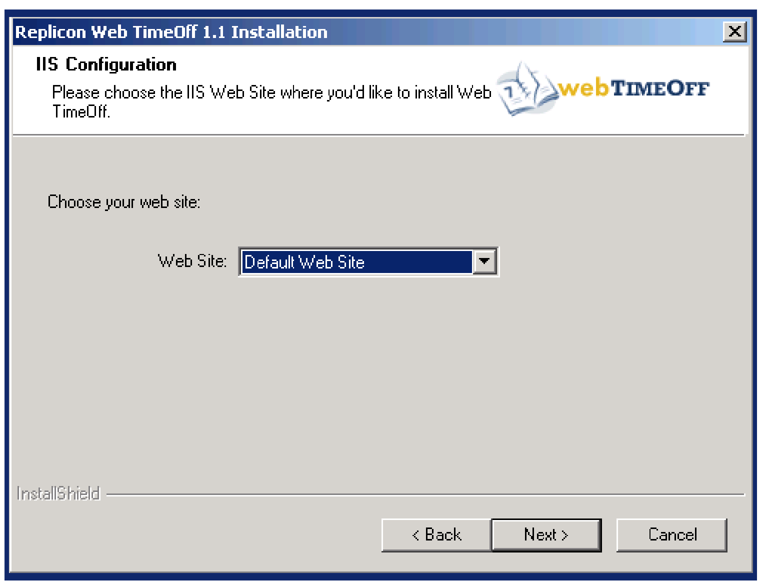
2. Read the license agreement. If you agree to the terms, select the "*I accept...*" option and click **Next**.



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

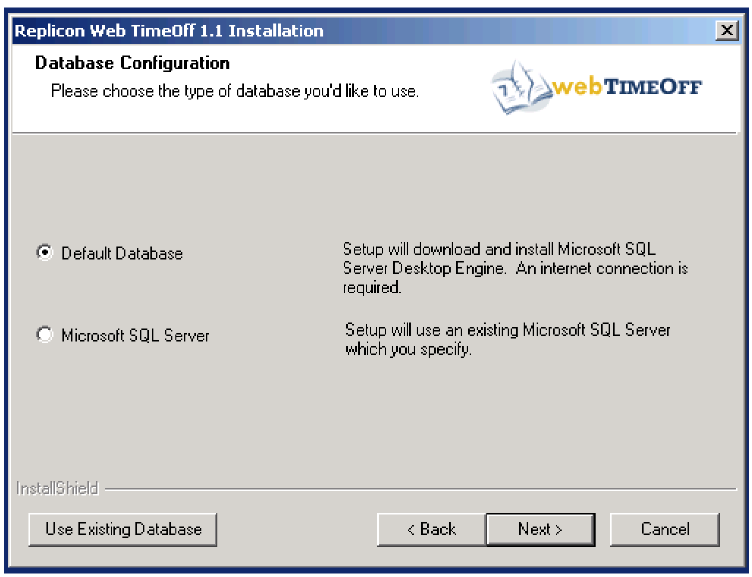


4. Choose the web site where you want to install Web TimeOff, and choose your login authentication, and click **Next**.

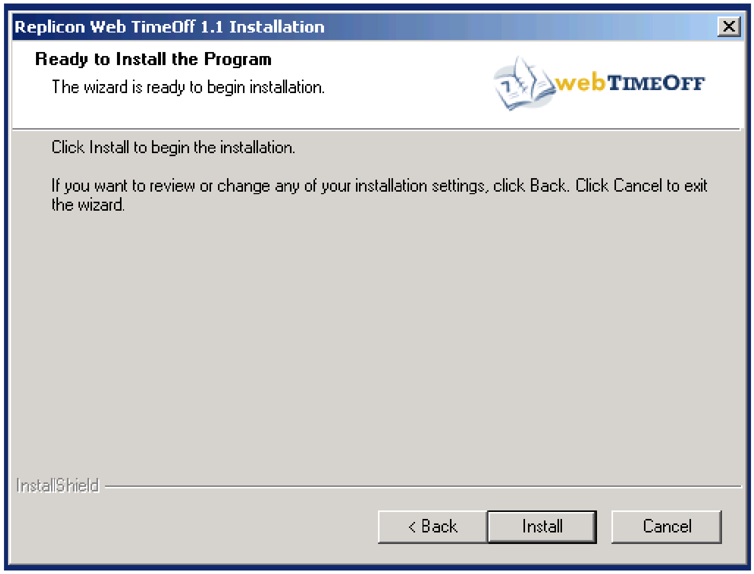


5. Select the database you want to use, or click **Use Existing Database** to use a pre-installed database.
   - If you select Default Database, the installation program will install the Microsoft SQL Server Desktop Engine (MSDE).
   - If you select Microsoft SQL Server, you will be asked to specify the SQL server hosting the database, and an administrative login name and password for this database.
   - If you choose to import data from an existing database, the Access database will be migrated to SQL, and 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.

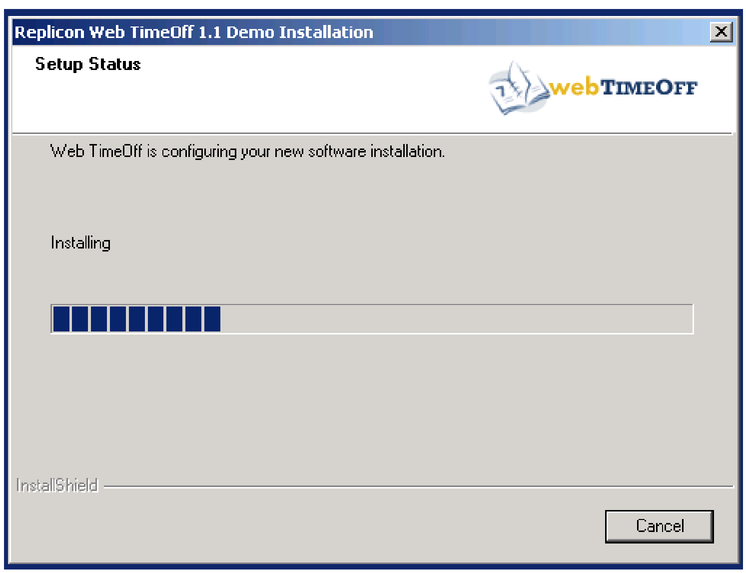
   When you are done, click **Next**.



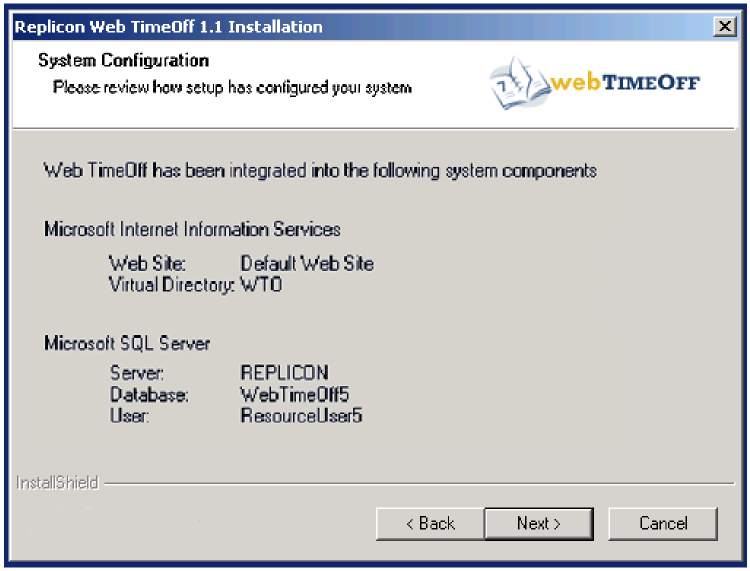
6. You are ready to install the software. Click **Install**.



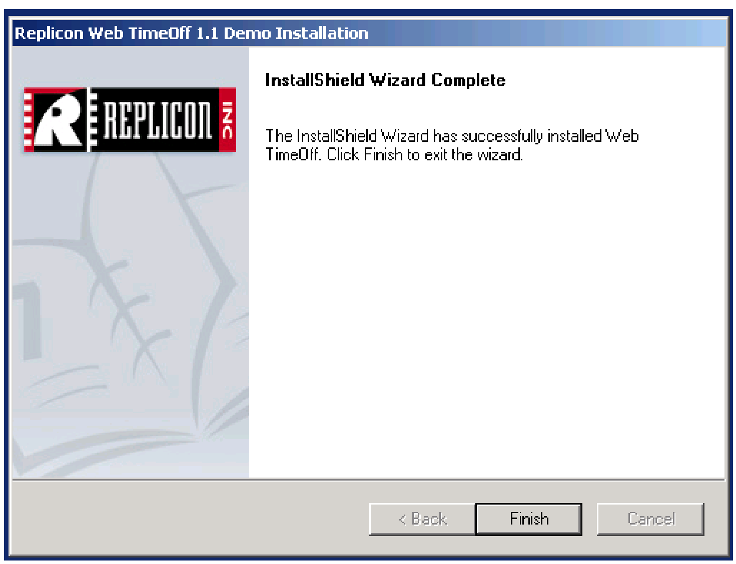
7. Allow the program to install the software.



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



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



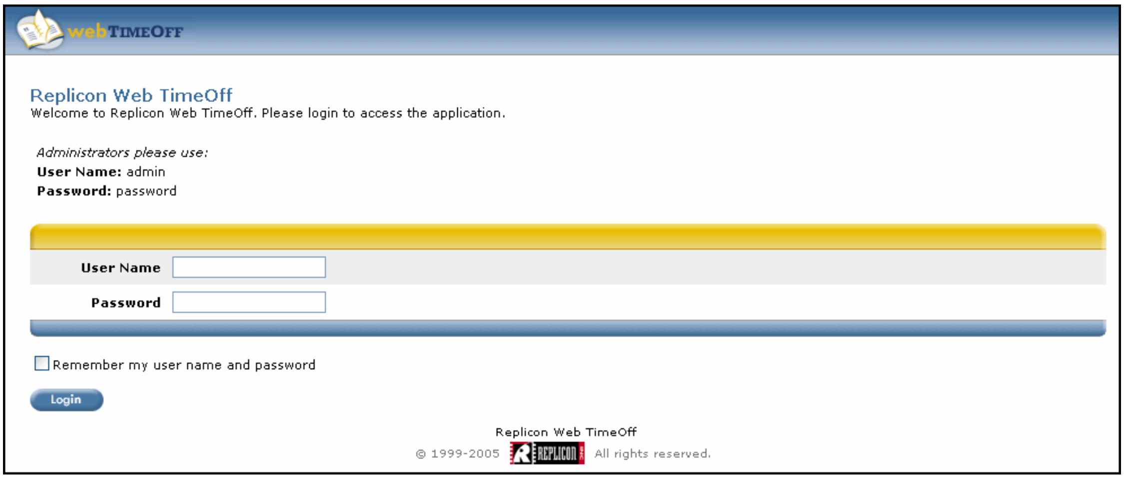
10. The Web TimeOff login screen will open in a browser. For more information on what to do next, go to the *Logging In for the First Time* section later in this document.

Logging In for the First Time

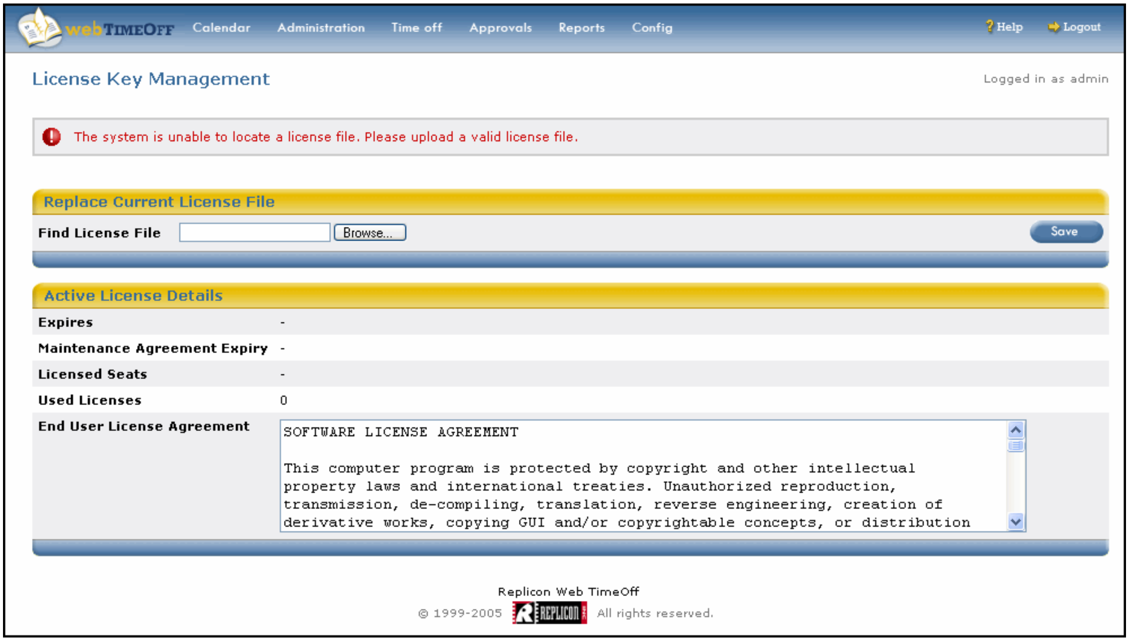
When you have finished installing the software, the Log In screen will appear. This first screen may take a few seconds to appear.

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.



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.

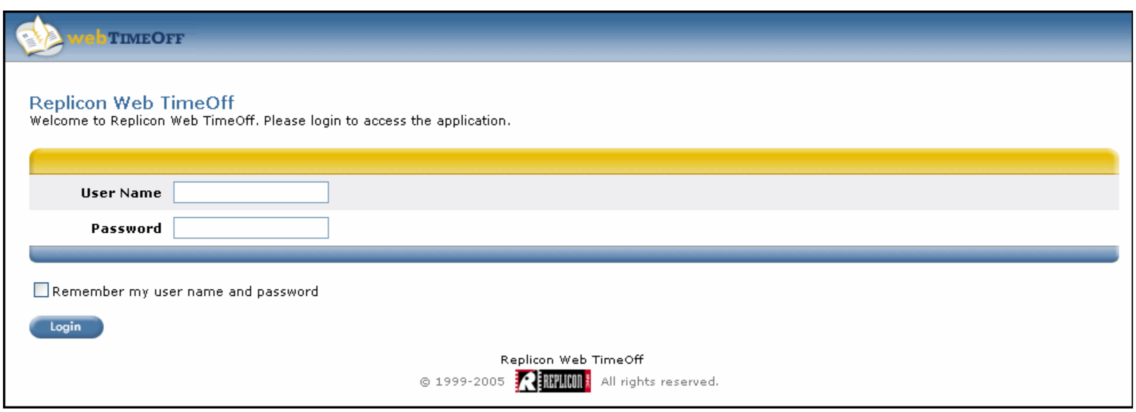
Chapter 3
Using Web TimeOff

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.

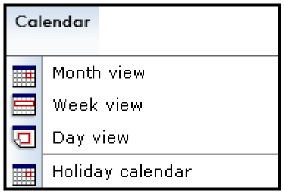


3. Enter your user name and password and click **Login.**

Note: *Passwords are case sensitive.*

Calendar

To drop down the calendar menu, select Calendar from the main menu.



Understanding the Calendar

The Calendar view is a dashboard, which will display your time off status, or the time off status of your team. If you are an administrator, manager or approver, you will have two tabs available to you – Shared Calendar and Approval Calendar. The Approval Calendar will allow you to take actions on the time off requests of you and your team. The Shared Calendar will show the status of your own personal time off requests, and depending on your group settings, the approved time off of other employees in your category.

If you are an employee with time off user access, you will only see the status of your time off requests, and depending on your group settings, the approved time off of other employees in your category.

There are a number of controls that let you modify your view of the calendars. Actions you can perform from the calendar view include:

- Save and submit your own time off requests
- Withdraw time off requests that have not yet been approved
- Withdraw approved time off requests, with proper permissions.
- Submit time off requests for employees you supervise, with proper permissions.
- Approve and/or reject time off requests for employees you supervise, with proper permissions.

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 5 Unread Request(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:

- All Employees
- Supervisor

To use the selection criteria:

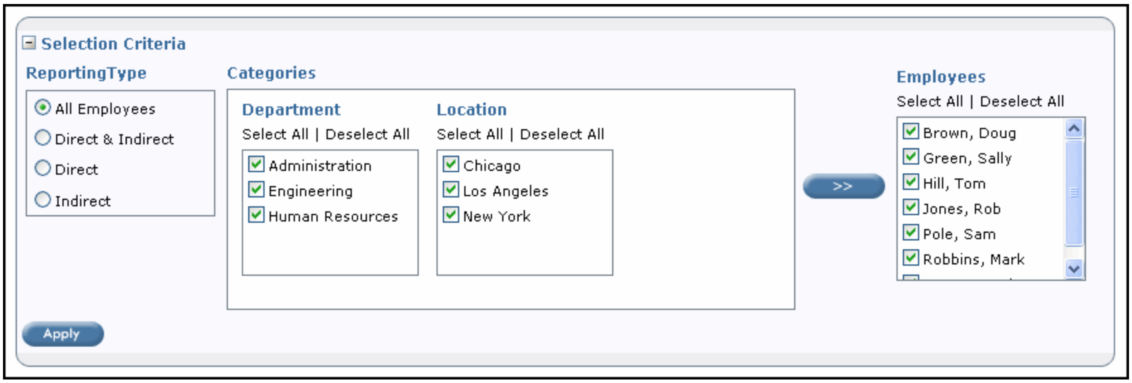
1. Expand the Selection Criteria section by clicking the + icon in the **Selection Criteria** section. You can later hide the Selection Criteria by clicking the - icon.
2. Select the appropriate **Reporting Type**. Reporting types determine which employees will be available in the Employees list, which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



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, select Calendar from the main menu, and click one of the following links:

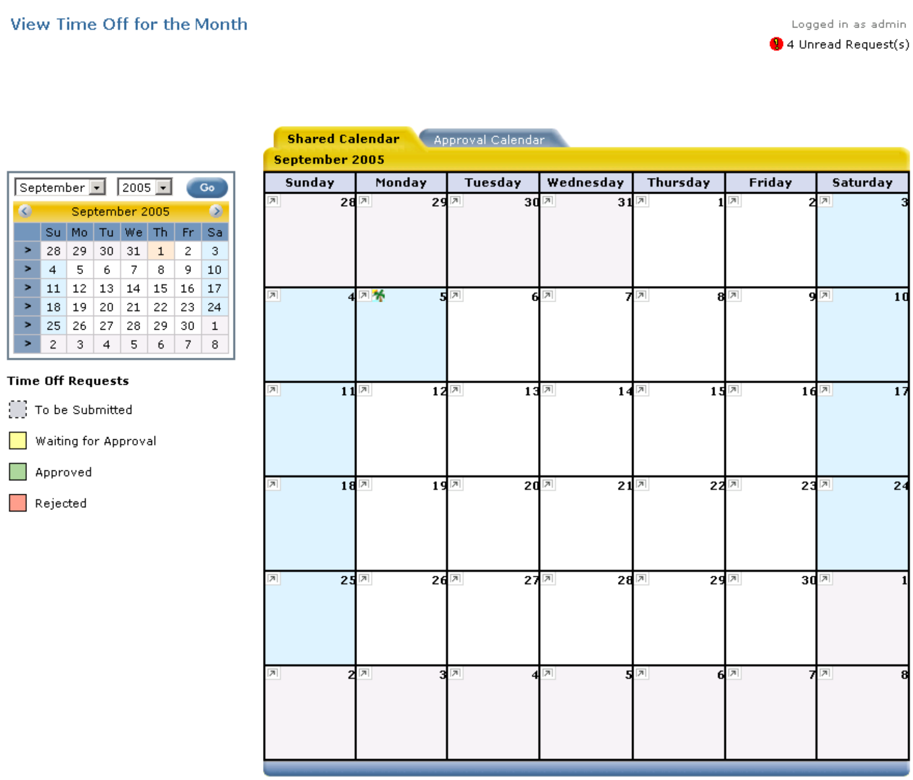
Month view

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. If you are an administrator, manager or approver, you will have two tabs available to you - Shared Calendar and Approval Calendar. The Approval Calendar will allow you to take actions on the time off requests of you and your team.

The Shared Calendar will show the status of your time off requests, and depending on your group settings, the approved time off of other employees.

If you are an employee with time off user access, you will only see the status of your time off requests, and depending on your group settings, the approved time off of other employees.

For further information about using Selection Criteria, refer to the *Selection Criteria* section earlier in this chapter.

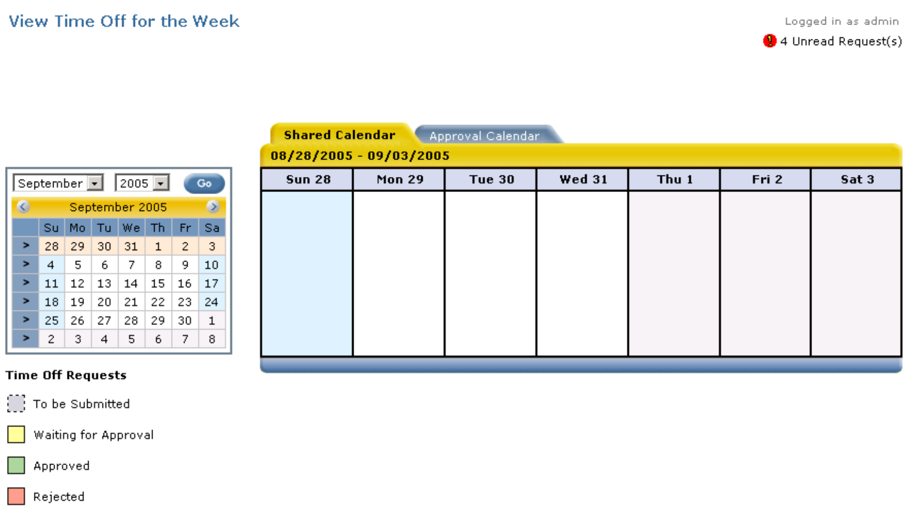


Week view

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. If you are an administrator, manager or approver, you will have two tabs available to you - Shared Calendar and Approval Calendar. The Approval Calendar will allow you to take actions on the time off requests of you and your team. The Shared Calendar will show the status of your time offs, and depending on your group settings, the approved time off of other employees.

If you are an employee with time off user access, you will only see the status of your time off requests, and depending on your group settings, the approved time off of other employees.

For further information about using Selection Criteria, refer to the Selection Criteria section earlier in this chapter.

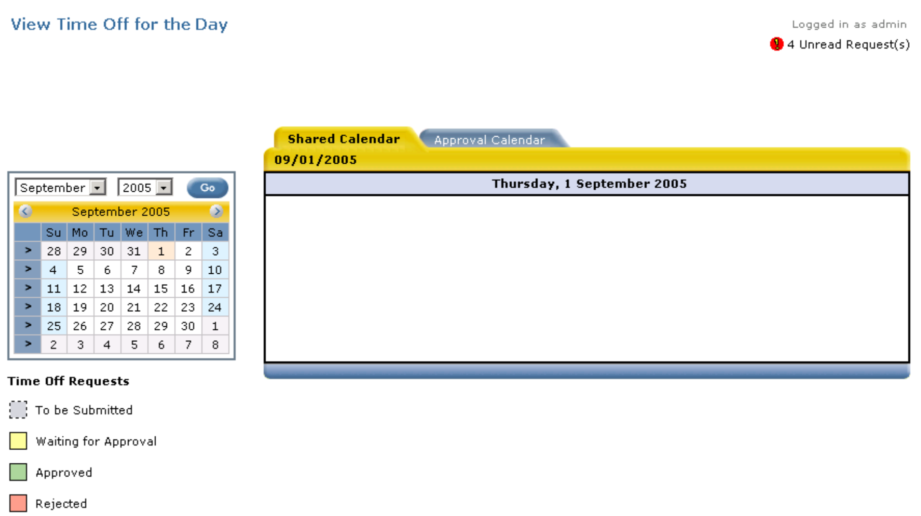


Day view

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. If you are an administrator, manager or approver, you will have two tabs available to you - Shared Calendar and Approval Calendar. The Approval Calendar will allow you to take actions on the time off requests of you and your team. The Shared Calendar will show the status of your time offs, and depending on your group settings, the approved time off of other employees.

If you are an employee with time off user access, you will only see the status of your time off requests, and depending on your group settings, the approved time off of other employees.

For further information about using Selection Criteria, refer to the Selection Criteria section earlier in this chapter.

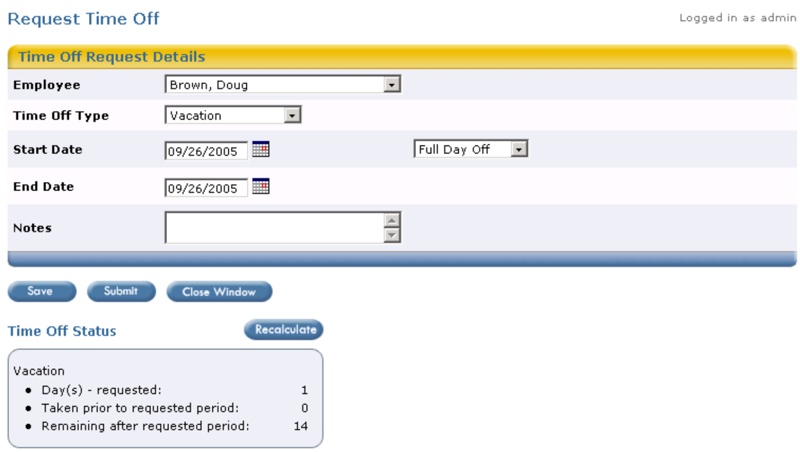


Requesting Time Off

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 will appear in your supervisor's calendar. Your supervisor can then approve or reject the request.

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.



2. Under **Time Off Request Details,** enter the following:

   - Select a name from the **Employee** drop-down list.

     If you are a supervisor, the list contains all employees who report to you. If you are not a supervisor (i.e., your permissions include only Time Off User access), only your name is displayed in the list.

     Refer to the Searching for an Employee section later in this chapter for information about the More... option in the drop-down list.

   - Select the **Time Off Type** from the drop-down list.
   - Select the **Start Date** and the **End Date** using the icon.

     Time off can include full or partial days. Partial days are defined by entering the number of hours off in the text field next to the date field, but only if hours have been selected from the System Preferences.

   - In the **Note** field, enter a text description that more clearly explains the time off request, if necessary.

3. Click **Recalculate** to display the new time off request in the Time Off Status section at the bottom of the screen.

4. Under Time Off Status, you can review the following information:

- **Day(s) Requested** displays the number of working days that the time off request covers.
- **Taken Prior to Requested Period** shows how many days off the employee has previously taken in this time off type.
- **Remaining After Requested Period** shows how many days are available to the employee after this time off request is taken. If the time off exceeds the allotted time for the respective time off type, then the days remaining in this row will be displayed in red.

5. The Approval History shows the life cycle of a time off request, including information on when the time off request was submitted, and the time and date that it was approved or rejected.

   Note: *If the System Preferences are set to track time off in hours, the Time Off Request page will display the information in hours instead of days.*

6. 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 exit without submitting the time off request, click **Cancel.**

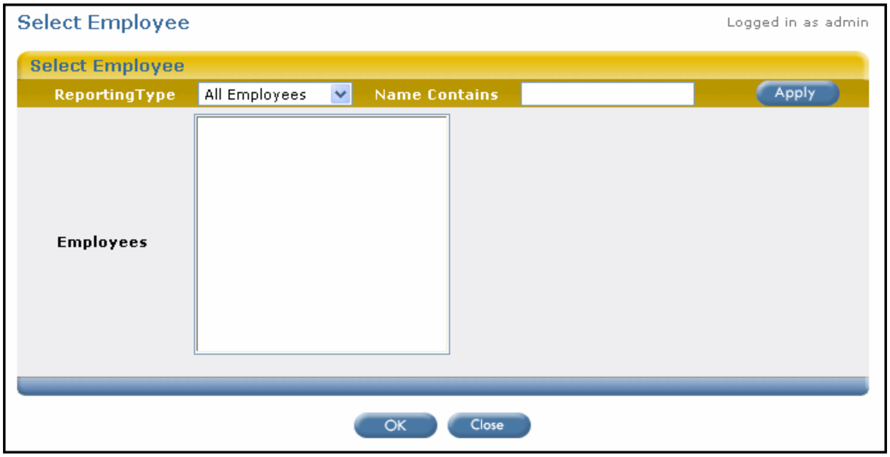
Note: *A time off request cannot be entered more than two years in advance.*

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.



2. Select a **Reporting Type** from the drop-down list, and/or enter the name or partial name of the employee you are searching for. If you search for a single letter, the search will return a list of employees for whom the letter you entered is in either the first or last name.
3. Click the **Apply** button to refresh the Employees list based on the search criteria.
4. Select the employee you want and click the **OK** button to apply that employee selection and return to the Time Off Rquest pop-up window. To exit without performing the employee search, click the **Close** button.

Viewing Time Off Requests

You can view the details for any time off requests displayed in the calendar. If a request has not yet been approved, you may modify the details, if necessary. If the request has already been approved, you cannot make changes to the details.

To view a time off request:

1. Click on the time off request (indicated by the coloured bar) in the calendar.
2. If the request has not yet been submitted, the request details will be displayed in edit mode, allowing you to modify it before submitting the request for approval.
3. Click one of the following buttons to continue:
   - Save
     Saves your changes but does not take further action.

- 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.
- Close Window
  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:

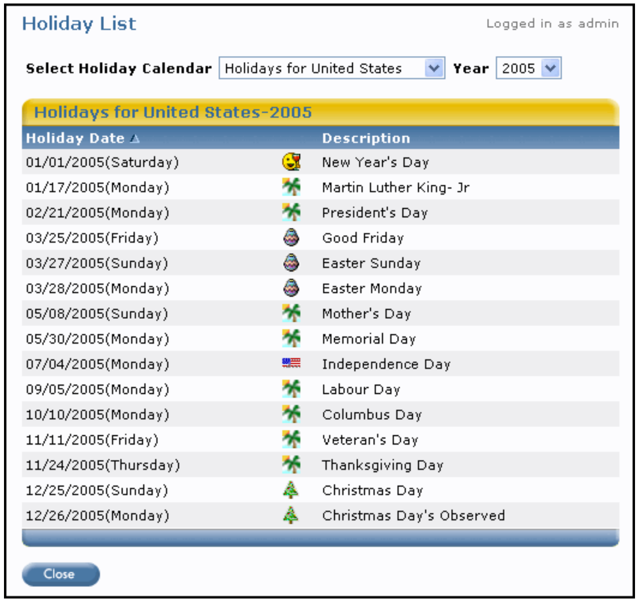
1. Click on the time off request (indicated by the coloured bar) in the calendar.
2. Modify the details of the request, as necessary.
3. Click one of the following buttons to continue:
   - Approve
     Approves the request and prevents further modifications.
   - Reject
     Rejects the time off request and sends it back to the employee for review.
   - Close Window
     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. Select **Calendar** from the main menu and click **Holidays.**
2. The **List Holidays** screen displays the list of holidays in your holiday calendar.

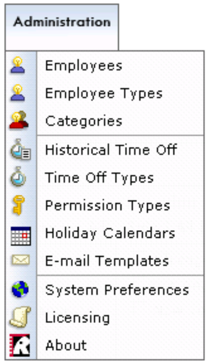


3. If you want to view a different holiday calendar for a different year, select the **Holiday Calendar** and the **Year** from the drop-down lists.
4. Click **Close Window** to close the **Holiday List**.

Note: *The calendar currently in effect is also shown in the Employee Details screen. The default calendar is set in the System Preferences screen.*

Administration

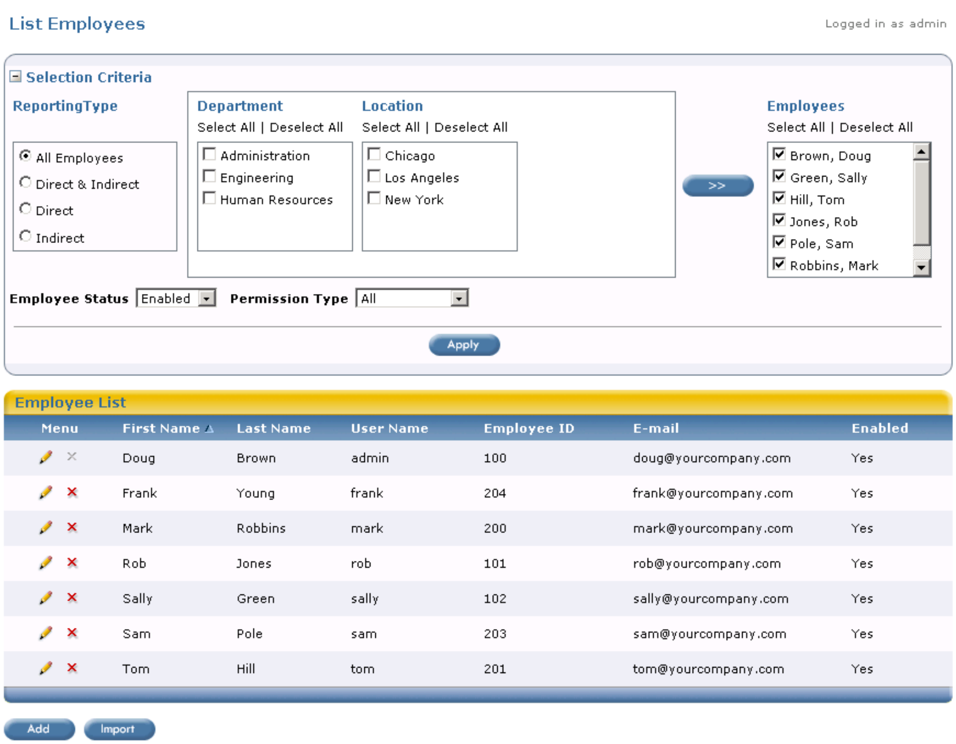
To drop down the Administration menu, select Administration from the main menu.



Viewing Employees

To view all available employees:

1. Select **Administration** from the main menu and click **Employees**.



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).
3. To delete an employee, click the icon next to the employee you want to delete. The icon is available only if you have permission to delete employee information (otherwise, it is greyed out). You cannot delete your own employee profile from the list.
4. To send an e-mail to an employee, click on the employee's e-mail address.
5. To add an employee, click the **Add** button and follow the instructions in the *Adding an Employee* section.
6. To import a large amount of employee information, click the **Import** button. Refer to the *Importing Employees* section for further information about importing employee information.

Selection Criteria

The Selection Criteria section allows you to limit the employees shown in the list 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. 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 Employee List table below.

   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.

   - <u>All Employees</u>
     This option includes all employees in the system, and is available only if you have appropriate permissions.

- 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 employee information. Select the appropriate groups, then click the >> button to refresh the Employees list with the employees included in those gropus.

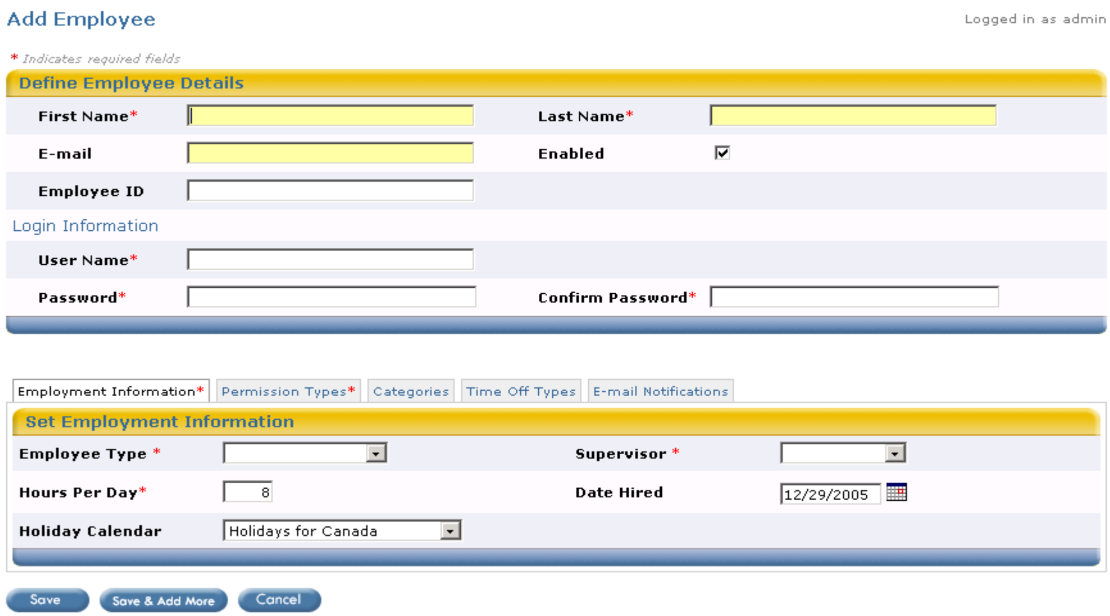
Adding Employees

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. Select **Administration** from the main menu and click **Employees**.
2. On the **List Employee** screen, click the **Add** button. The **Add Employee** screen is displayed.

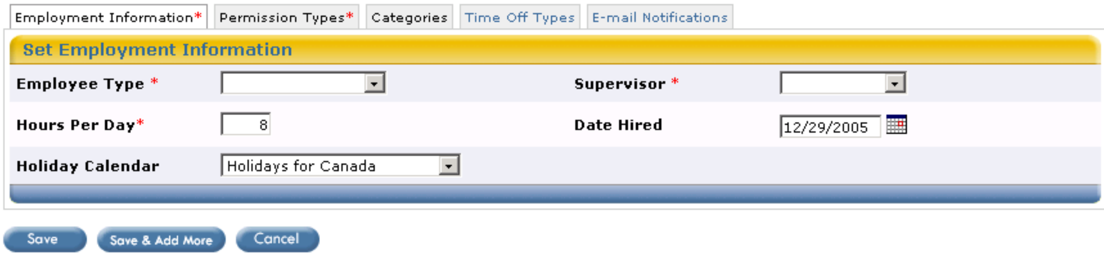


3. Under **Define Employee Details,** enter the following:
   - **First Name** of the employee (mandatory field).
   - **Last Name** of the employee (mandatory field).

     *The **First Name** and **Last Name fields** must not exceed a total of 50 characters each.*
   - **E-mail** address of the employee.
   - Clear the **Enabled** check box to prevent the employee from logging in and using the application.

     Enabled employees count towards the total number of licensed users purchased by your organization.
   - **Employee ID** of the employee.
4. In the **Security** section, enter the following:
   - A unique **User Name** (mandatory field).
   - The employee's **Password** (mandatory field), and confirm the password.

5. Click the **Employee Information** tab.

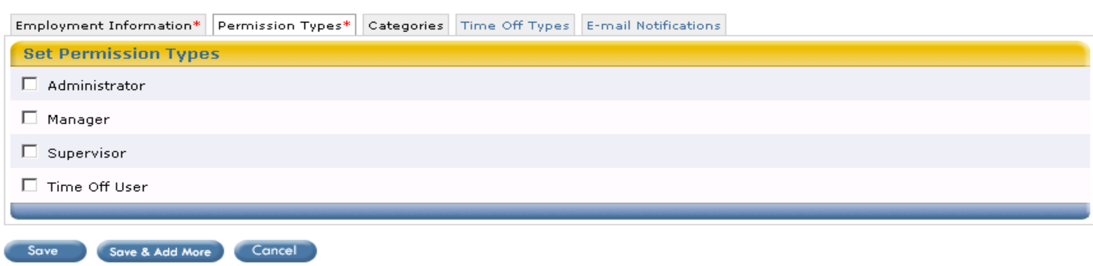


6. Under **Set Employee Information**, enter the following:

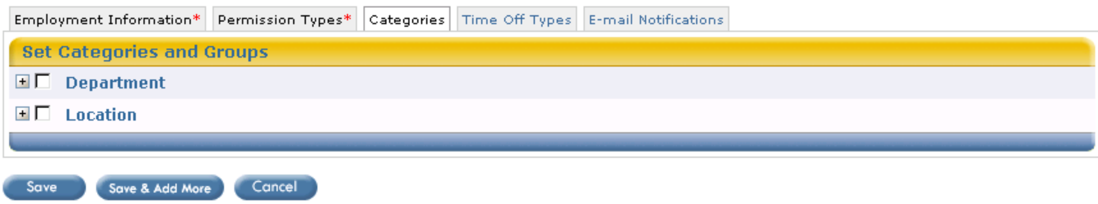
- Select the **Employee Type** from the drop-down list (mandatory field).
- Select the employee's **Supervisor** from the drop-down list. (mandatory field). The Supervisor can approve or reject any time off requests submitted by the employee.

  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.

7. Click the **Permission Types** tab, and select the permission types you want to assign to the employee. This will determine what an employee has access to in Web TimeOff, and whether they will be an administrator, manager, supervisor or time off user.



8. To add the employee to existing groups, click the **Categories** 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. This 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.*

9. Select the **Time Off Types** tab and clear the time off types that you do not want to make available to the employee.

The following table provides detailed explanations of each field in the **Time Off** section..

Field	Description
Effective Date	Select the **Effective Date** by clicking the icon. The **Effective Date** indicates the date from which the **Initial Balance** would take effect. To enable the default accrual and default reset, the Effective Date must be a valid date. If it is an invalid date, it will take the current date by default.
Initial Balance	Select the **Initial Balance** by entering the number of days that the employee will start with in this time off type. The **Initial Balance** is related to the **Effective Date**. It is the initial number of days given to an employee by the administrator, which will override all the accruals and resets. To enable the default accrual and default reset, the **Initial Balance** must be a valid number.

Field	Description
Accruals	Select the **Accruals** option from the drop-down menu. The **Accruals** indicate the number of days which will be earned in a given period, depending on the option you choose from the drop-down list: • No Accruals: If you select No Accruals, then there will be no accrual for the time off type. Employees will not earn additional time off. • Weekly: If you select Weekly, then you must select the day of the week when the accrual should be updated, and enter the number of days to be added. For example, if an employee earns 0.2 days of time off for each week, they will amass 10.4 days in this time off type each year. • Semimonthly: If you select Semimonthly, then you must select the two dates from the drop-down list when the accrual should be updated. You must also enter the number of days to be added. For example, if an employee earns 0.5 days of time off in the semimonthly format, you may choose to update their accrual on the 1st and 16th day of every month. At this rate, the employee would amass 12 days in this time off type each year. • 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 added. For example, if an employee earns one day of time off for each month, they will amass 12 days in this time off type each year. • 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 added. For example, if an employee earns ten days of time off for each year, you may choose to update their accrual on the first day of January every year. At this rate, the employee would amass 10 days in this time off type each year.

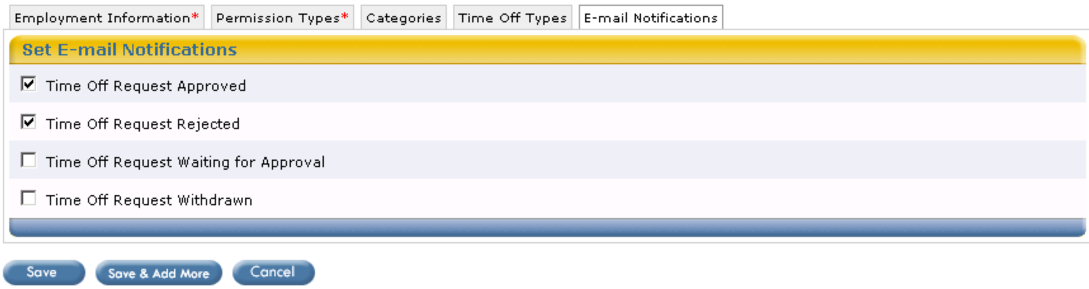
Field	Description
Reset	Select the Reset option from the drop-down list. Reset indicates the number of days which a given time off type will be reset to, depending on the option you choose from the drop-down list: No Reset: If you select No Reset, the time off type will not lose any unused time off. For example, if an employee earns 10 days off each year, and only uses 5 days, the remaining 5 days will be carried over to the next year. Weekly: If you select Weekly, then you must select the day of the week when the reset should be updated. You must also choose whether the reset will be specific to a certain number of days or allow up to a maximum number of days, and enter the number of days to be reset. For example, if an employee earns 1 day off each week, and does not use that time off during the week, you may choose to reset the total every Sunday. You can choose to set a specific reset, meaning that each week, the total amount of time off remaining is reset to a certain number regardless, or you can choose a maximum reset, which means that the total cannot exceed a preset number. In this case, you could set a specific reset to 1 day, so that the employee never has more than 1 day available, or a maximum reset to 5 days, so that the employee can earn up to five days of time off in this time off type. Semimonthly: If you select Semimonthly, then you must select the two dates each month when the reset should be updated. You must also choose whether the reset will be specific or set to a maximum, and enter the number of days to be reset. For example, if an employee earns 1 day off per month, and does not use that time off during the month, you may choose to reset the total on the 1st and 16th of each month. You can choose to set a specific reset, meaning that twice a month, the total amount of time off remaining is reset to a certain number regardless, or you can choose a maximum reset, which means that the total cannot exceed a preset number. In this case, you could set a specific reset to 1 day, so that the employee never has more than 1 day available, or a maximum reset of 5 days, so that the employee can earn up to five days of time off in this time off type.

Field	Description
Reset (con't)	Monthly: If you select Monthly, then you must select the date when the reset should be updated. You must also choose whether the reset will be specific, or set to a maximum, and enter the number of days to be reset. For example, if an employee earns 1 day off per month, and does not use that time off during the month, you may choose to reset the total on the 1st day of each month. You can choose to set a specific reset, meaning that once a month, the total amount of time off remaining is reset to a certain number regardless, or you can choose a maximum reset, which means that the total cannot exceed a preset number. In this care, you could set a specific reset to 1 day, so that the employee never has more than 1 day available, or a maximum reset of 5 days, so that the employee can earn up to five days of time off in this time off type. Yearly: If you select Yearly, then you must select the month and date when the reset should be updated. You must also choose whether the reset will be specific, or set to a maximum, and enter the number of days to be reset. For example, if an employee earns 10 days off per year, and does not use that time off during the year, you may choose to reset the total on the 1st day of January each year. You can choose to set a specific reset, meaning that once year, the total amount of time off remaining is rest to a certain number regardless, or you can choose a maximum reset, which means that the total cannot exceed a preset number. In this case, you could set a specific reset to 10 days, so that the employee never has more than 10 days available, or a maximum reset of 15 days, so that the employee can earn up to 15 days of time off in this time off type.

If the Administrator changes the time off type setting of an employee, the changes will take effect only from the **Effective Date**. Example: An employee has been allotted 5 days as an **Initial Balance,** with an **Effective Date** of January 1st, 2005. if the Administrator changes the **Effective Date** to January 1st, 2006, the 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 to set up time off types to best meet the needs of your organization.

10.Click the **E-mail Notifications** tab.



11.Select the e-mail notification templates you want to assign to the employee.

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 exit without saving 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. Select **Administration** from the main menu and click **Employees.**
2. On the **List Employee** screen, click the **Import** button. The **Import Employee** screen is displayed.

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 new list of employee data.

Special Cases

- **Case 1**
  If the number of records being imported exceeds the number of licenses available in Web TimeOff, all of the records will be imported, but only the number of employees equal to the number of licenses will be enabled. The rest of the records are disabled in the application. For example, if you have 50 licenses of Web TimeOff, and 100 employees, all 100 would be imported into the program, but only 50 employees could be enabled at any one time.
- **Case 2**
  If an employee reports to Rob, and Rob is not an assigned approver in the application, then during the import process, the employee data will be assigned to admin as the "reporting to" authority (Supervisor). If the admin is not available, or if the admin account does not have supervisor permissions, the first available supervisor will be assigned as the "reporting to" authority.
- **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
SINo	The numbered order of employee information.
FirstName	The first name of the employee.
LastName	The last name of the employee.
UserName	The user name of the employee.

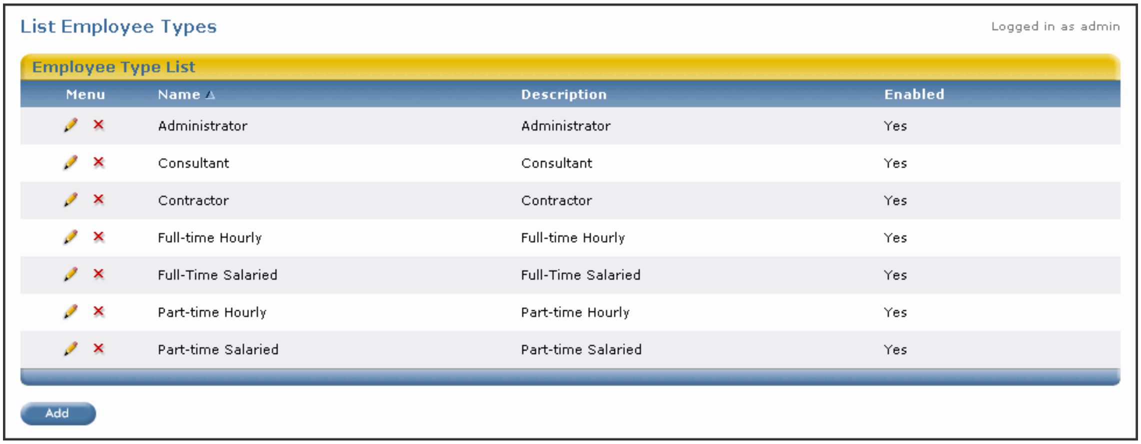
Fields	Description
Password	The password of the employee.
E-mail	The e-mail address of the employee.
Supervisor	The UserName of the supervisor of the employee.
EmployeeType	The employee type assigned to the employee.
DateHired	The joining date of the employee.
PermissionType	The permission type assigned 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.
AsOfDate1, AsOfDate2, AsOfDate3	The date that the time off type takes effect.
InitialBalance1, InitialBalance2, InitialBalance3	The initial balance assigned to the respective time off types.
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.
AccrueValue1, AccrueValue2, AccrueValue3	The accrual value for the respective time off types.

Fields	Description
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.
ResetValueType1, ResetValueType2, ResetValueType3	The reset value types for the respective time off types.
ResetValue1, ResetValue2, ResetValue3	The reset value for the respective time off types.
Category1, Category2	The categories associated with the employee.
Groups1, Groups2	The groups associated with the respective categories.

Viewing Employee Types

To view the employee type list:

1. Select **Administration** from the main menu and click **Employee Types**. The **List Employee Types** screen is displayed.

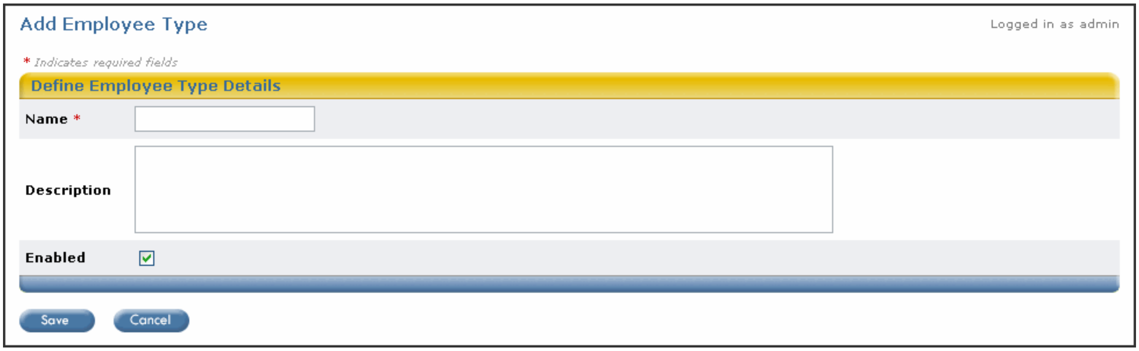


2. To edit an employee type, click the icon next to the employee type you want to edit.
3. To delete an employee type, click the icon next to the employee type you want to delete. An employee type cannot be deleted if it is assigned to one or more employees.
4. To add an employee type from this screen,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

Adding Employee Types

To add an employee type:

1. Select **Administration** from the main menu and click **Employee Types**.
2. On the **List Employee Types** screen, click **Add.** The **Add Employee Type** screen is displayed.

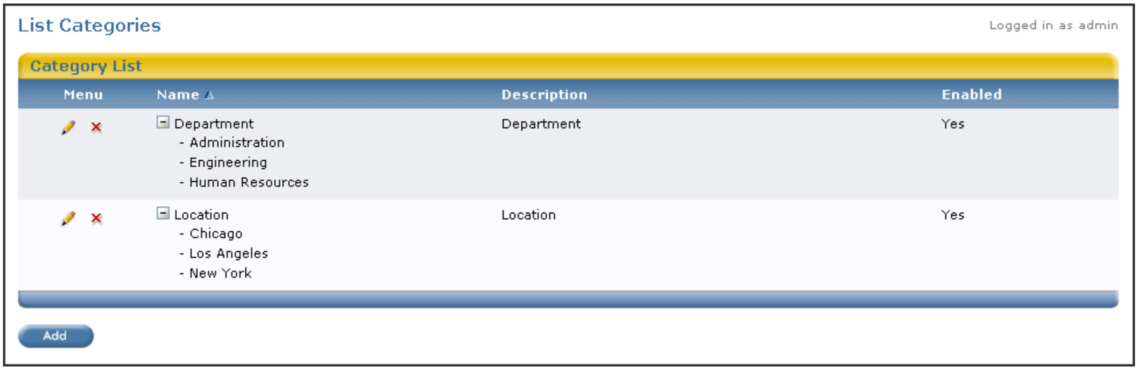


3. Under Define Employee Type Details:
   - In the **Name** field, enter a unique name for the employee type.
   - In the **Description** field, enter any text that more clearly explains or defines the employee type.
   - Clear the **Enabled** check box, if you do not want to activate the employee type in the application.
4. When you are done, click the **Save** button to save the employee type. If you want to exit without saving the employee type, click the **Cancel** button.

Viewing Categories

To view the list of categories:

1. Select **Administration** from the main menu and click **Categories.** The **List Categories** screen is displayed.

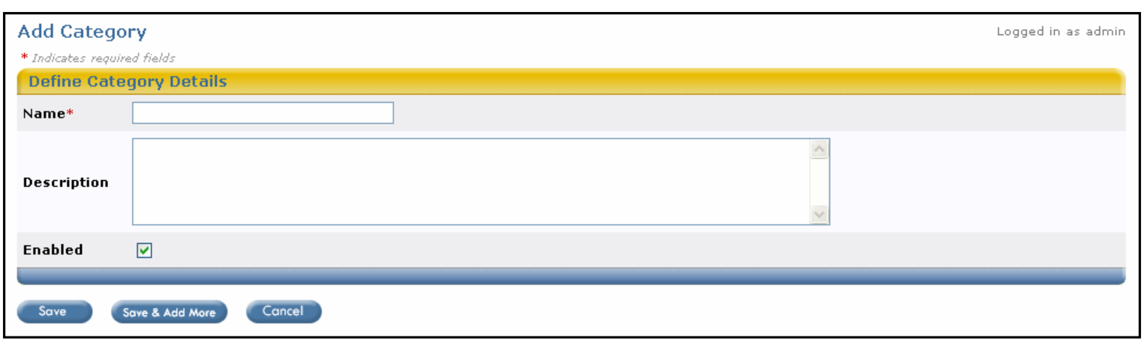


2. To edit a category or group, click the icon next to the category you want to edit or click on the name of the category.
3. To delete a category, along with it's group, click the icon next to the category you want to delete.
4. To add a category from this screen, click **Add** and follow the instructions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

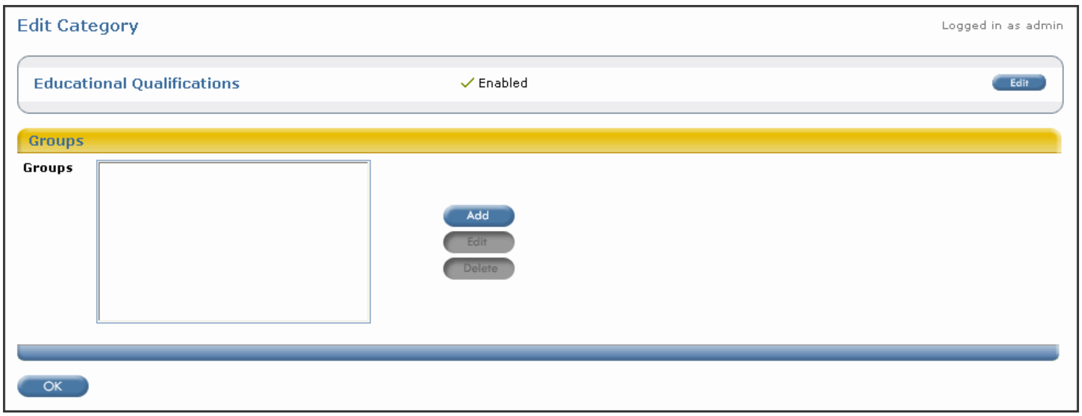
Adding Categories

To add a category:

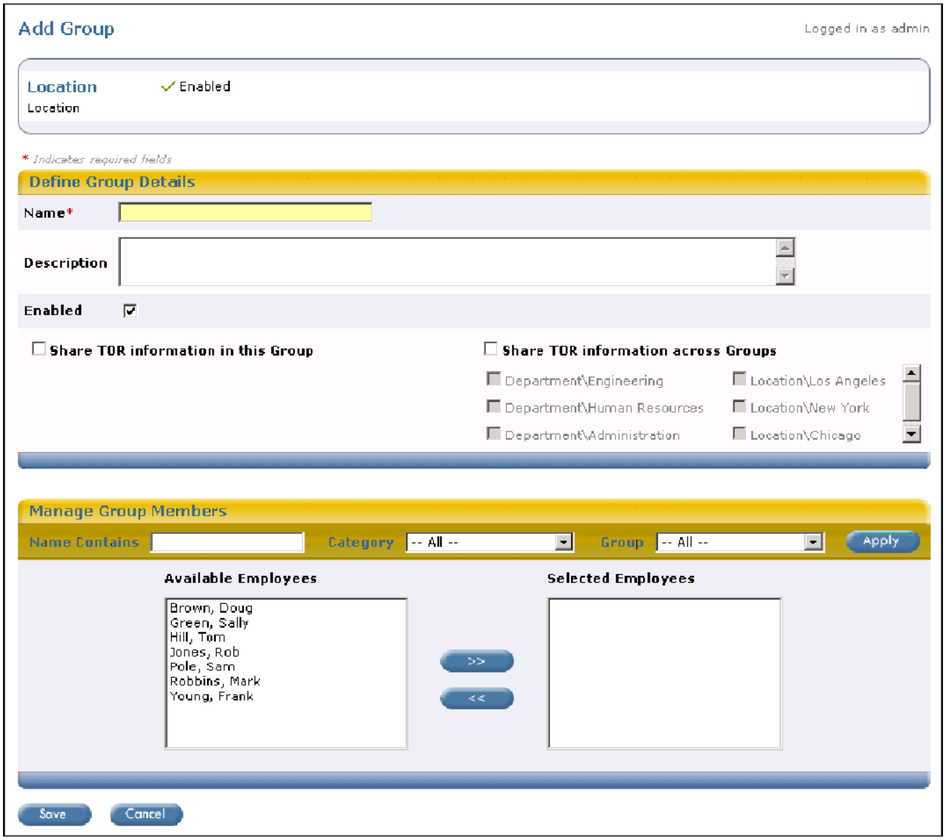
1. Select **Administration** from the main menu and click **Categories**.
2. On the **List Categories** screen, click **Add.** The **Add Category** screen is displayed.



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. 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 exit without saving the category, click the **Cancel** button.
6. 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.



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



8. 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.
   - Click the **Share TOR Information in this Group** check box if you would like all group members to see, in their shared calendar, the approved time off requests made by other group members.
   - Click the **Share TOR Information across Groups** check box if you would like another group to see, in their shared calendar, the approved time off requests made by the members of this group. Select the check box next to each group that you would like to share the information with.

9. 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 may 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.
   - If you would like to see a list of all employees, leave the name field blank, and select **All** from both the category and group drop-down list.

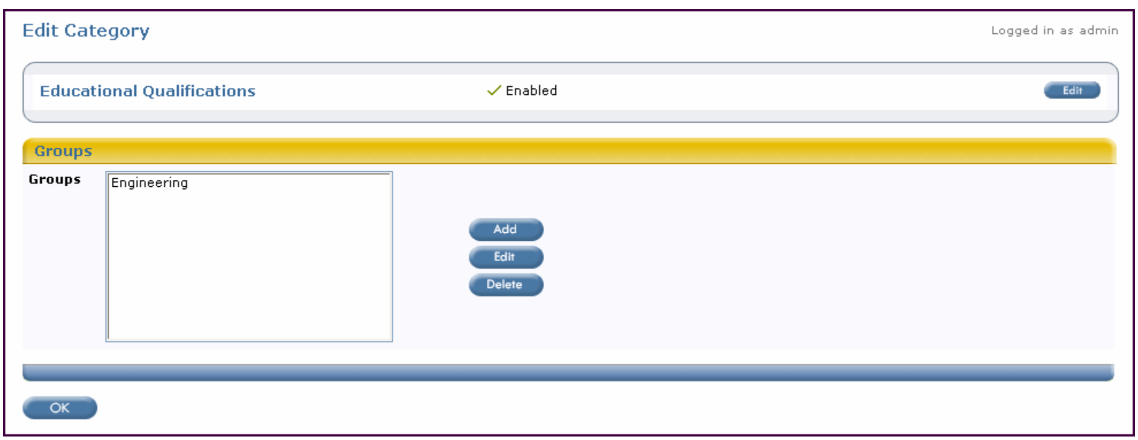
10. Click **Apply.** Based on the search criteria, the employees are displayed in the **Available Employees** list.

11. Select the employee(s) you want to assign to the group from the **Available Employees** list and click the >> button.

12. 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.

13. Click **Save** to confirm the addition of the group to the category**.** The **Edit Category** screen is displayed.



14. If you want to edit a group, select the group from the **Groups** list and click **Edit.**

15. If you want to delete a group, select the group from the **Groups** list and click **Delete.**

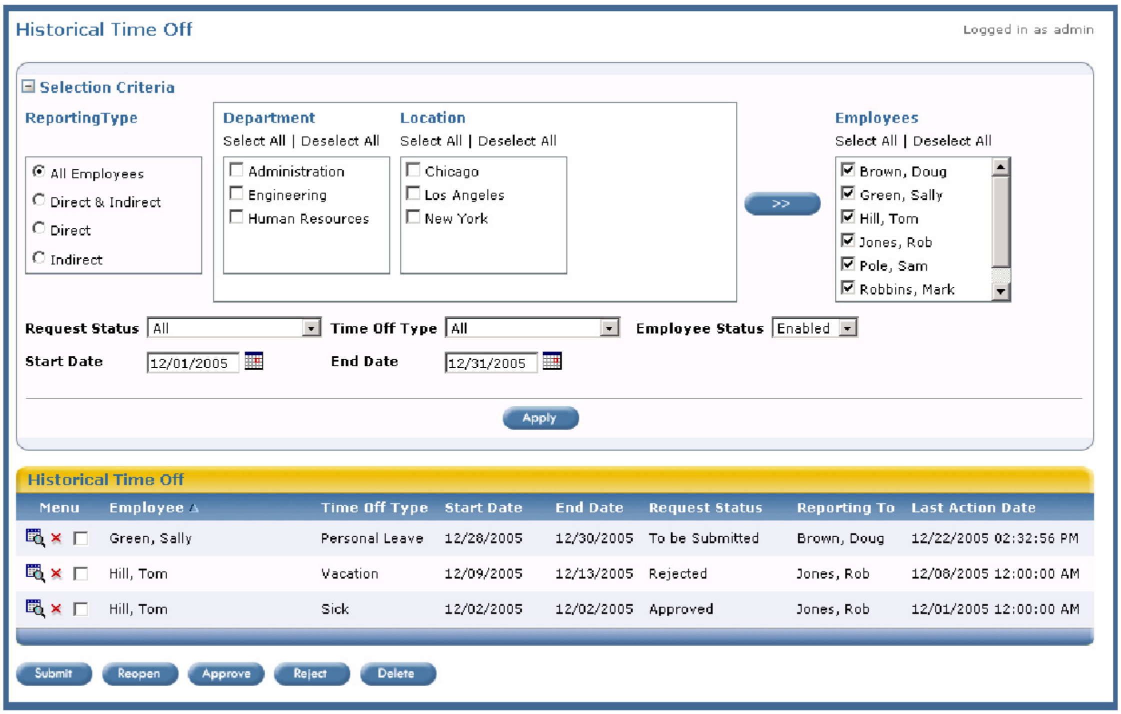
16. Click **OK** to go to the **List Categories** screen.

Viewing Historical Time Off

The Historical Time Off 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. Select **Administration** from the main menu and click **Historical Time Off.** The **Historical Time Off** screen is displayed.



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

2. Under the selection criteria, do the following:
   - Select the **Request Status** from the drop-down list.

     The available options are:
     - To be Submitted
     - Waiting for Approval
     - 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, provided you have the appropriate permissions:
   - To submit a time off request, select the check boxes for historical time off requests with an approval status of To be Submitted and click **Submit**.
   - To withdraw a time off request, select the check boxes for historical time off requests with an approval status of To be Submitted or Approved, and click **Withdraw**.
   - To approve a time off request, select the check boxes for historical time off requests with an approval status of Waiting for Approval 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 Waiting for Approval or Approved and click **Reject**.
   - To delete a time of request, select the historical time off 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.

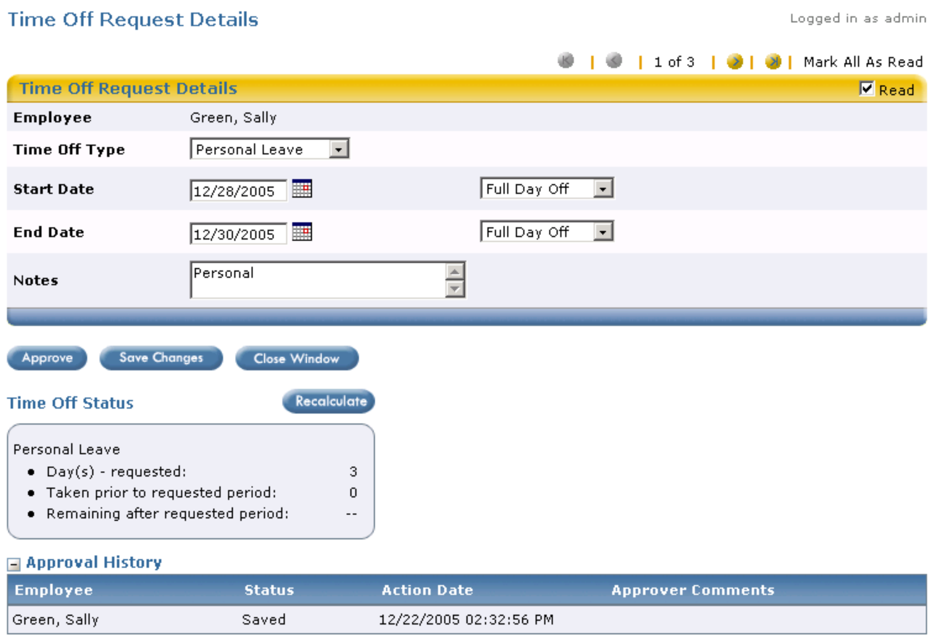
     Note that deleting a time off request is a permanent action and cannot be reversed.
5. When you perform any of the above actions, a confirmation screen is displayed confirming the action. Click **Yes** to confirm the action or click **No** to return to the **Historical Time Off** screen.

Editing Historical Time Off

Time off requests with an approval status of To be Submitted can be modified from the Historical Time Off screen.

To edit a historical time off request:

1. Click the icon next to the time off request on the **Historical Time Off** screen. Note that the time off request must have an approval status of To be Submitted.
2. On the **View Time Off Request** pop-up window, click the **Edit** button. The **Edit Time Off Request Details** pop-up window is displayed.



***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 Changes** to save the changes.
4. If you have the appropriate permissions, you can approve the time off request by clicking **Approve**.
5. Click **Refresh** to display the updated time off status.
6. To exit from editing the time off request without saving, click **Close Window.**
7. Under Time Off Status, you can review the following information:
    - **Day(s) Requested** displays the number of working days that the time off request covers.

- **Taken Prior to Requested Period** shows how many days off the employee has previously taken in this time off type.
- **Remaining After Requested Period** shows how many days are available to the employee after this time off request is taken. If the time off exceeds the allotted time for the respective time off type, then the days remaining in this row will be displayed in red.

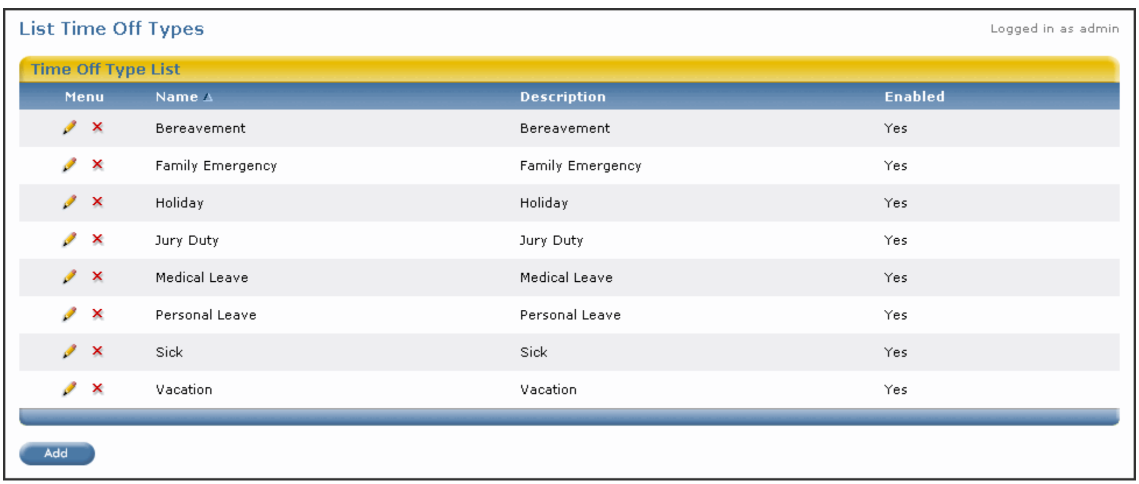
The Approval History shows the life cycle of a time off request, including information on when the time off request was submitted, and the time and date that it was approved or rejected.

Note: *If the System Preferences are set to track time off in hours, the Historical Time Off page will display the information in hours instead of days.The Approval History section displays the status of time off request over a period of time.*

Viewing Time Off Types

To view the list of time off types:

1. Select **Administration** from the main menu and click **Time Off Types.** The **List Time Off Types** screen is displayed.



List Time Off Types

Logged in as admin

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

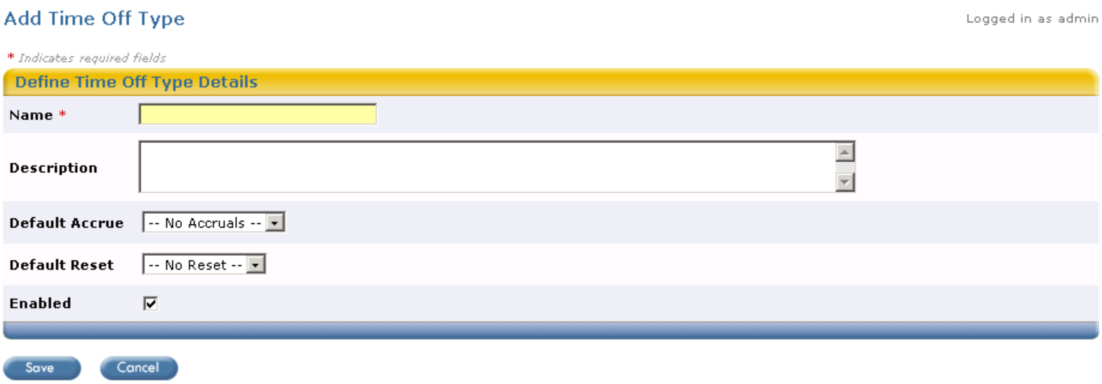
Add

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 is 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. Select **Administration** from 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.



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 **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 form 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.

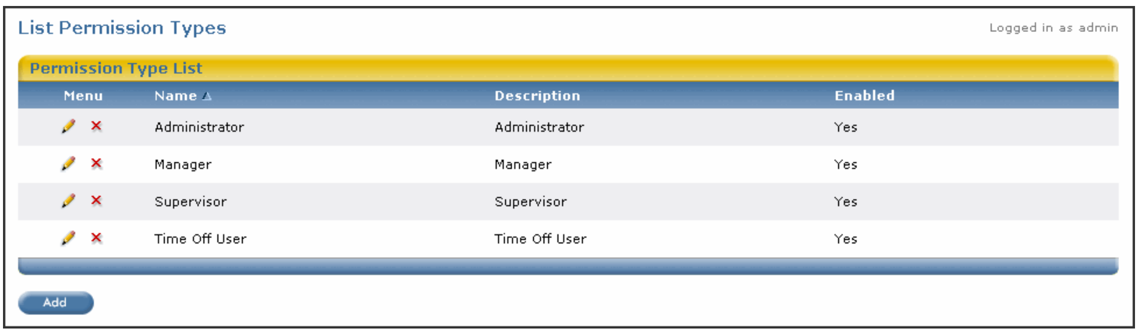
4. Click **Save**, to save the time off type. If you want to exit without saving the defined time off type, click **Cancel**.

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).*

Viewing Permission Types

To view the list of permission types:

1. Select **Administration** from 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

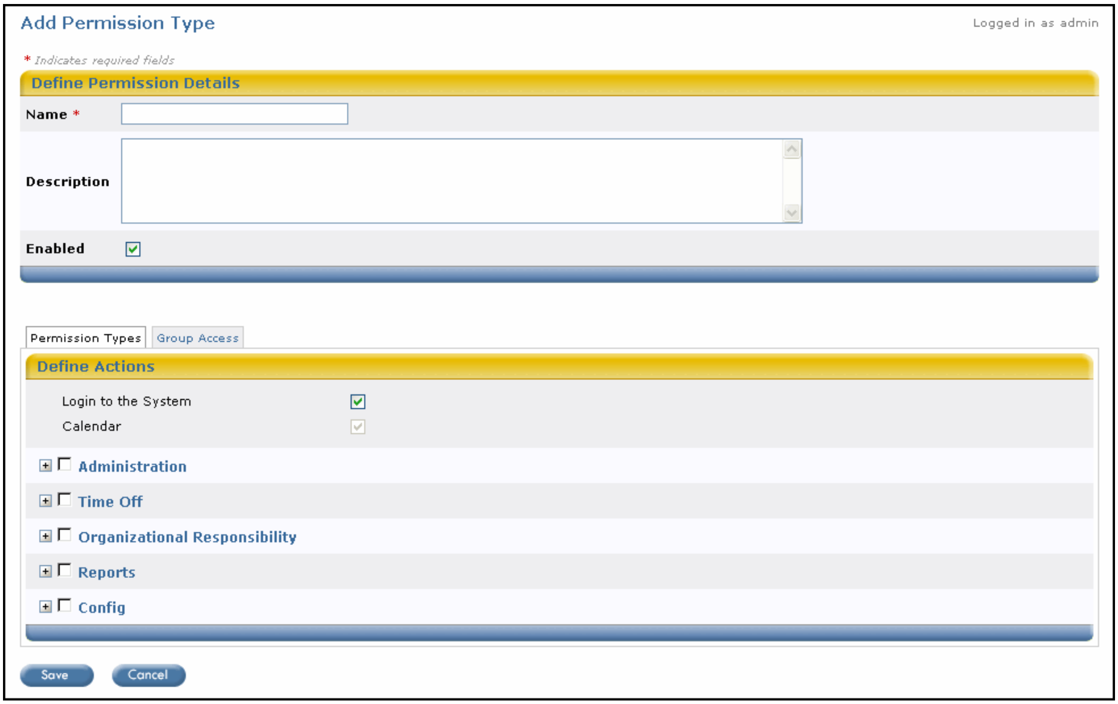
Note: *A Permission Type cannot be deleted if it is being used in the application.*

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. Select **Administration** from the main menu and click **Permission types.**
2. On the **List Permission Types** screen, click **Add.** The **Add Permission Type** screen is displayed.



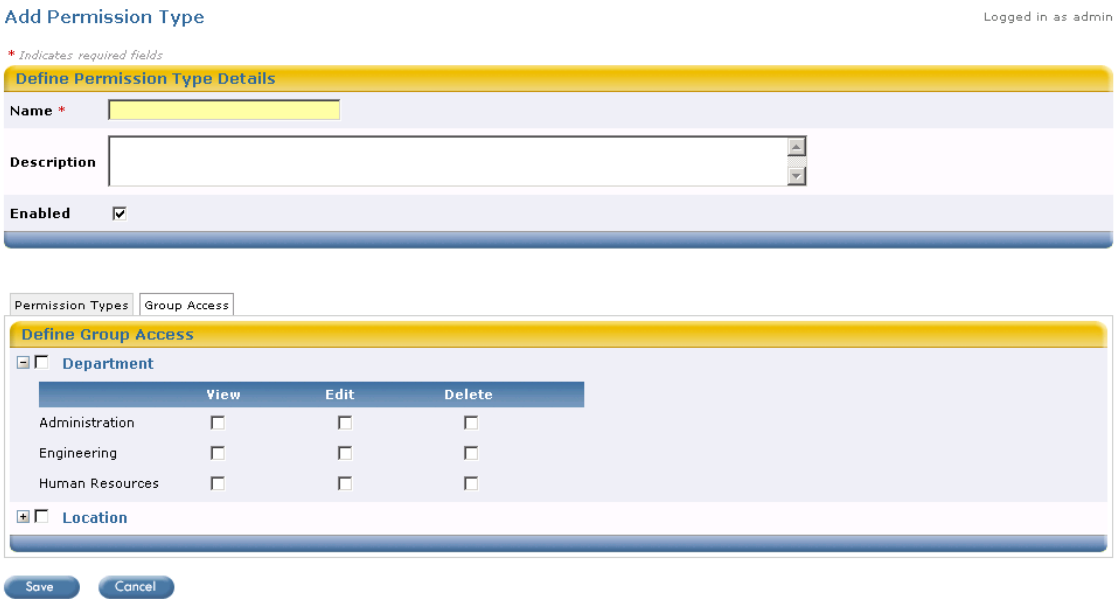
3. Enter a unique **Name** (mandatory field) and a **Description** in the respective fields.
4. Clear the **Enabled** check box, if you do not want to activate the permission type in the Web TimeOff system.
5. Under the **Define Actions** section, select the **Permission Types** tab, and select the check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

   Login to the System and **Calendar** are always selected by 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 requests 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.

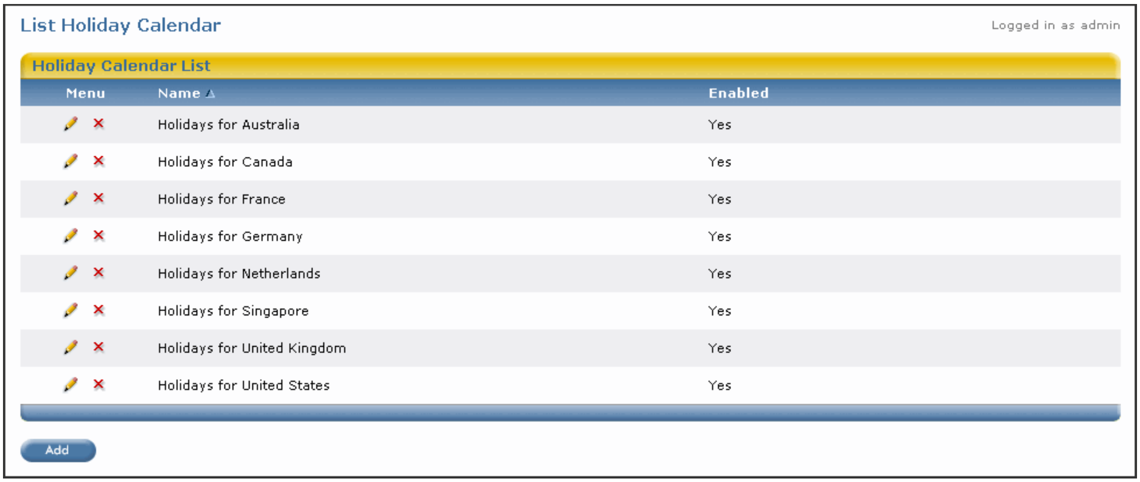


7. Click **Save** to save the permission type. If you want to exit without adding this permission type, click **Cancel**.

Viewing Holiday Calendars

To view the list of holiday calendars:

1. Select **Administration** from the main menu and click **Holiday Calendars.** The **List Holiday Calendar** screen is displayed.



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: *A holiday calendar cannot be deleted if it is used in the application.*

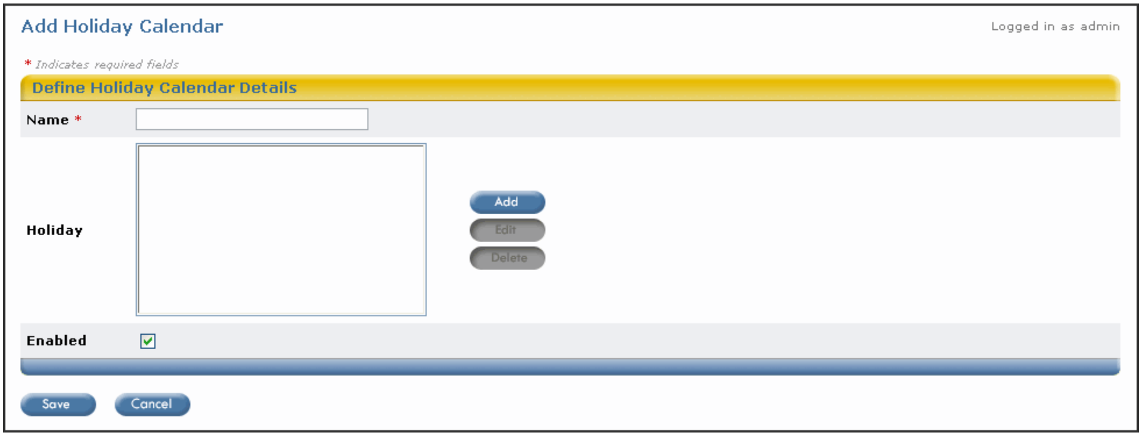
4. To add a holiday calendar from this screen, click **Add** and follow the instructions in the section called *Adding Holiday Calendar.*

Adding Holiday Calendar

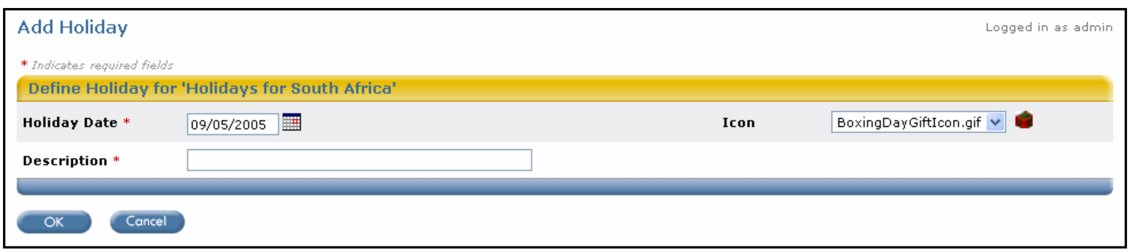
To add a holiday calendar:

1. Select **Administration** from the main menu and click **Holiday calendars.**

2. On the **List Holiday Calendar** screen, click **Add.** The **Add Holiday Calendar** screen is displayed.

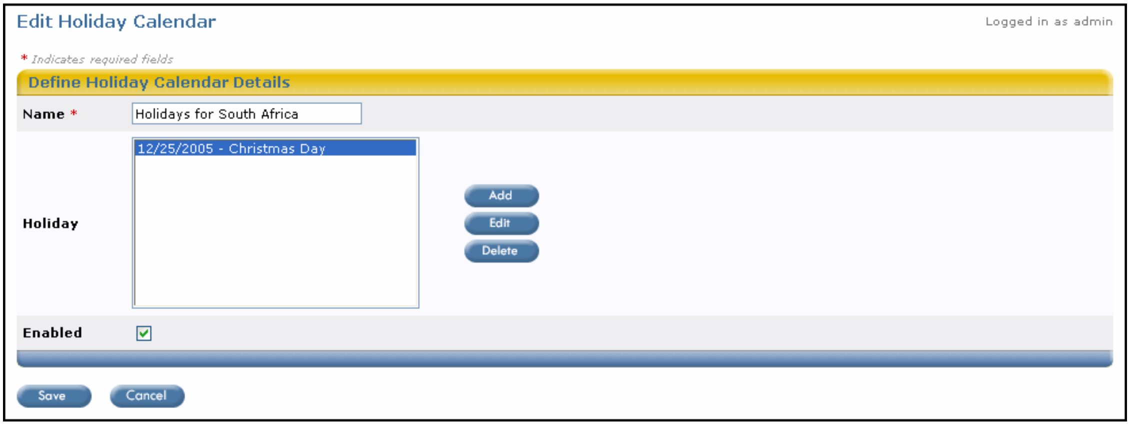


3. Under **Define Holiday Calendar Details,** enter a unique **Name** (mandatory field) for the holiday calendar.
4. If you want to add a holiday to your holiday calendar, click **Add.**
5. The **Add Holiday** screen is displayed.



6. Under **Define Holiday,** enter the following:
   - Select the **Holiday Date** using  icon (mandatory field).
   - Select an icon from the **Icon** drop-down list. If you would like to add your own icon for a particular holiday, you can add a gif or jpeg picture file that is 15 pixels by 15 pixels to the Holidays folder in the ApplicationRoot\images area of the Web TimeOff program file.
   - Enter a **Description** of the holiday (mandatory field).
7. Click **OK** to go to the **Edit Calendar** screen.
8. If you want to exit without adding this holiday, click **Cancel.**

9. The **Edit Holiday Calendar** is displayed.



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 exit without adding this holiday calendar, click **Cancel.**

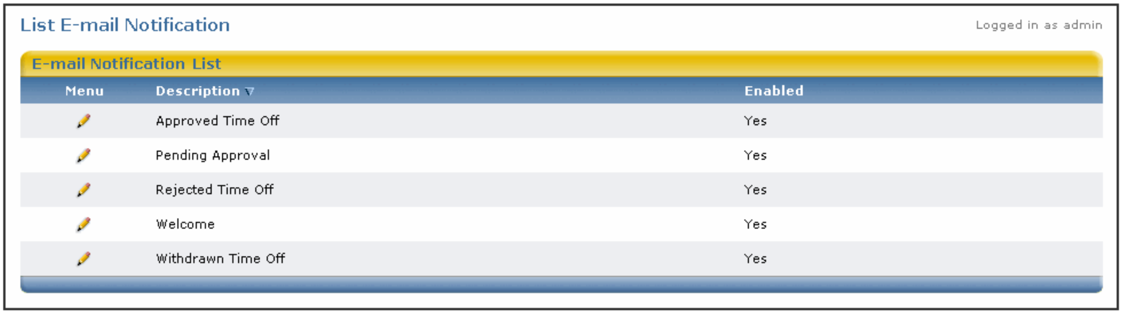
Special Cases

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 the approver to let them know that the holiday calendar has been changed; however, the old holiday calendar will still be in effect for this time off request. 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. If the employee withdraws their time off request after it has been approved, and submits the time off request again, the modified holiday calendar will be used.

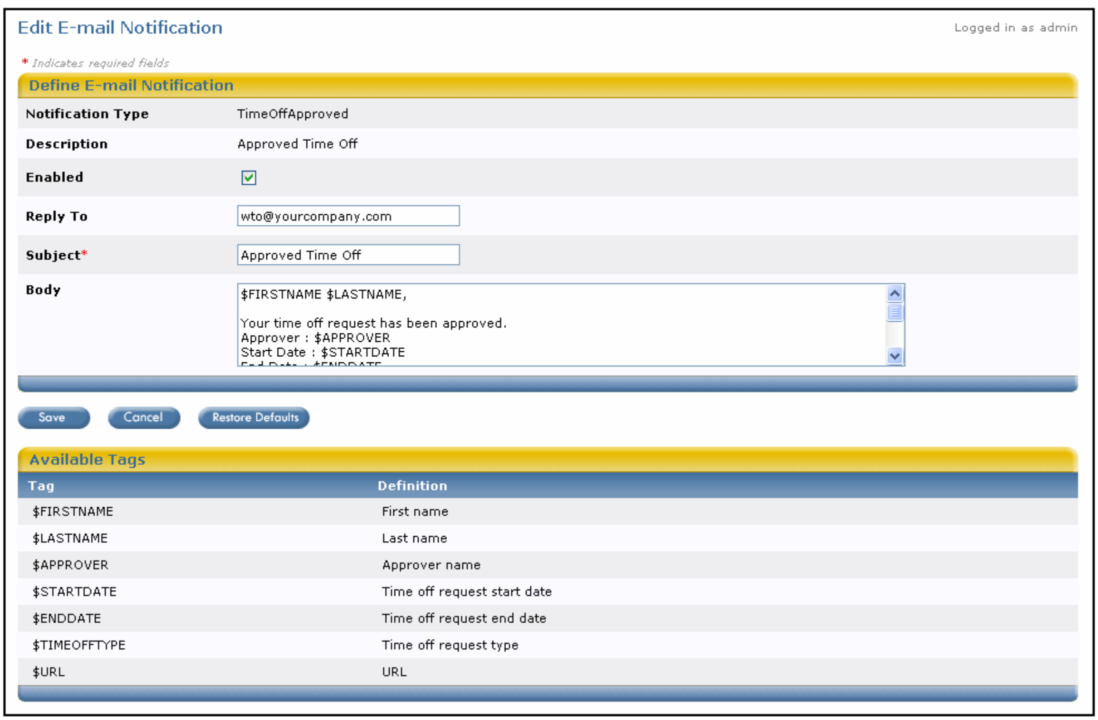
Managing E-mail Notifications

To view an e-mail notification list:

1. Select **Administration** from the main menu and click **E-mail Notifications.** The **List E-mail Notifications** screen is displayed.



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** screen is displayed.



3. Under **Define E-mail Notification ,** 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.
4. Click **Save** to save the changes**.** If you want to restore the default settings, click **Restore Defaults.** If you want to exit without changing the e-mail notification, click **Cancel.**

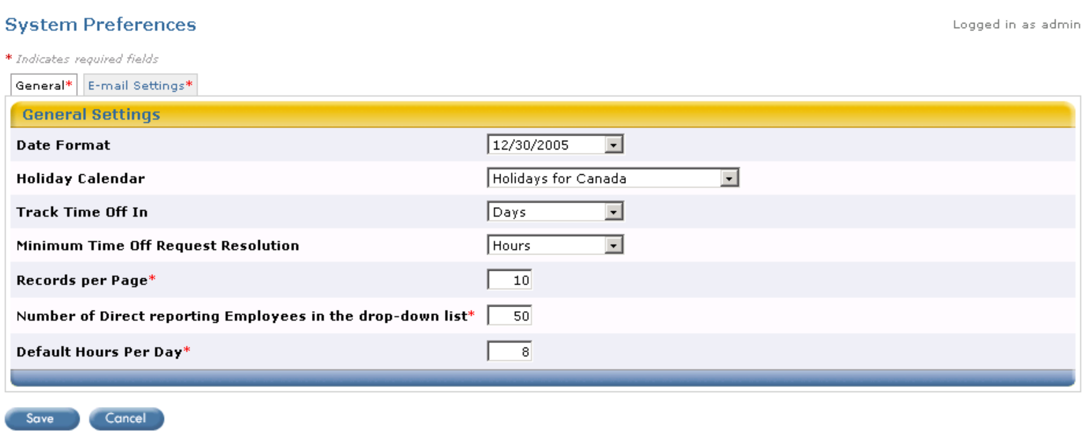
Note: *E-mail notifications may contain tags that customize information into a list (miniature report) within the e-mail notification. These tags are listed at the bottom of each e-mail notification template with a definition and can be added or removed from a notification, depending on the needs of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

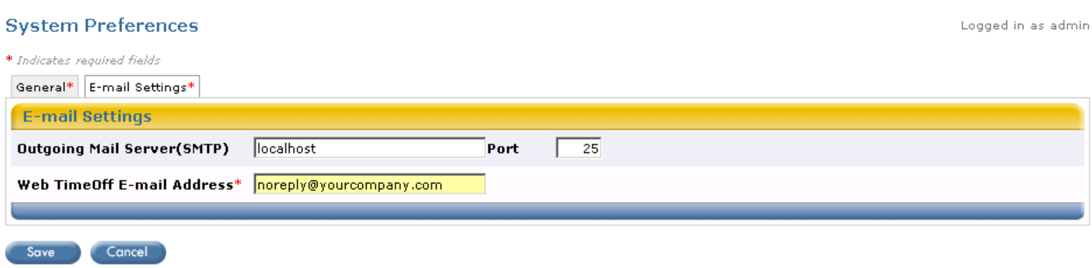
1. Select **Administration** from the main menu and click **System preferences**. The **System Preferences** screen is displayed, with two tabs – General and E-mail Settings. The field descriptions are defined below.
2. Under the **General** tab, enter the following:



   - Select the **Date Format** from the drop-down list. There are a number of varieties, both numeric and alpha-numeric.

- Select the **Holiday Calendar** from the drop-down list. Refer to Adding Holiday Calendars for more information.
- Select a format to **Track Time Off In** – either **Days** or **Hours**. This will affect how you see information within the application. For example, if you choose to track time off in hours, a week of holiday time will display as 40 hours. If you choose to track time off in days, a week of holiday time will display as 5 days.
- Set the **Minimum Time Off Request Resolution** from the drop-down list. You can choose **Full Day**, **Half Day**, **Quarter Day** or **Hours**. This will affect how you request information within the application. For example, if you choose **Full Day** as the minimum resolution, employees may only request a full day of time off. If you choose **Half Day**, employees may request a full or half day of time off. If you choose **Quarter Day**, employees may choose a full, ¾, ½ or ¼ day of time off. And if you choose **Hours**, employees may choose to request any amount of time off, up to their maximum hours per day, as defined the **Employees** section.
- Enter the maximum number of records you would like to see displayed on each page in the **Display Records per Page** field. This is a mandatory field that cannot be left blank.
- Enter the maximum number of direct-reporting employees you would like to see displayed in the drop-down list in the **Number of Direct reporting Employees** in the drop-down list field. This is a mandatory field that cannot be left blank.
- Enter the number of hours that the employee is expected to work in an average day in the **Default Hours Per Day** field. This is a mandatory field that cannot be left blank, but may be overridden by **Employee** settings.

3. Under the **E-mail Settings** tab, enter the following:



- Select the **Mail Server Type** from the drop-down list.
- Select the name of the **Mail Server**, and enter the **Port** number.
- Enter the **Web TimeOff E-mail Address**. This is a mandatory field that cannot be left blank.

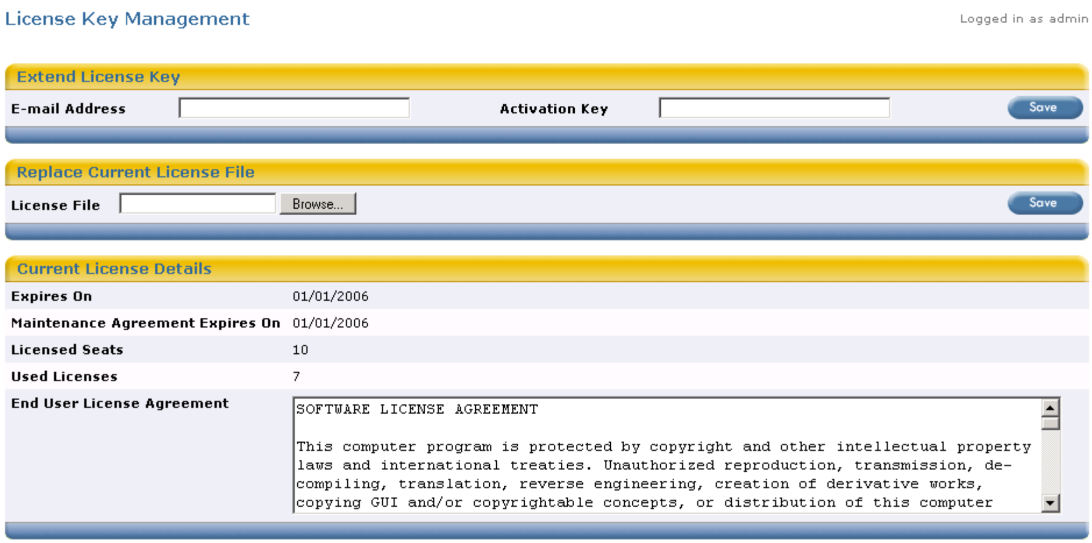
***Note**: The **Date Format** and **Display Records per Page** fields can be changed at the employee level in the **My Preferences** section. If an administrator changes the system preference details, the **Date Format** and the **Display Records per Page** fields for the existing employees will remain the same. The change in the **Date Format** and the **Display Records per Page** will affect only new employees who are added after the change is made. The **Holiday Calendar** and **Default Hours Per Day** can be changes at the employee level in the employee **Detailed Information** section.*

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

Adding a License Key

To add a license key:

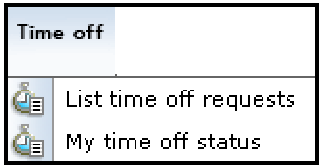
1. Select **Administration** from the main menu and click **Licensing.**
2. On the **Find License Field**, enter or browse to the path where the license key is located.
3. Click **Save.**



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

Time off

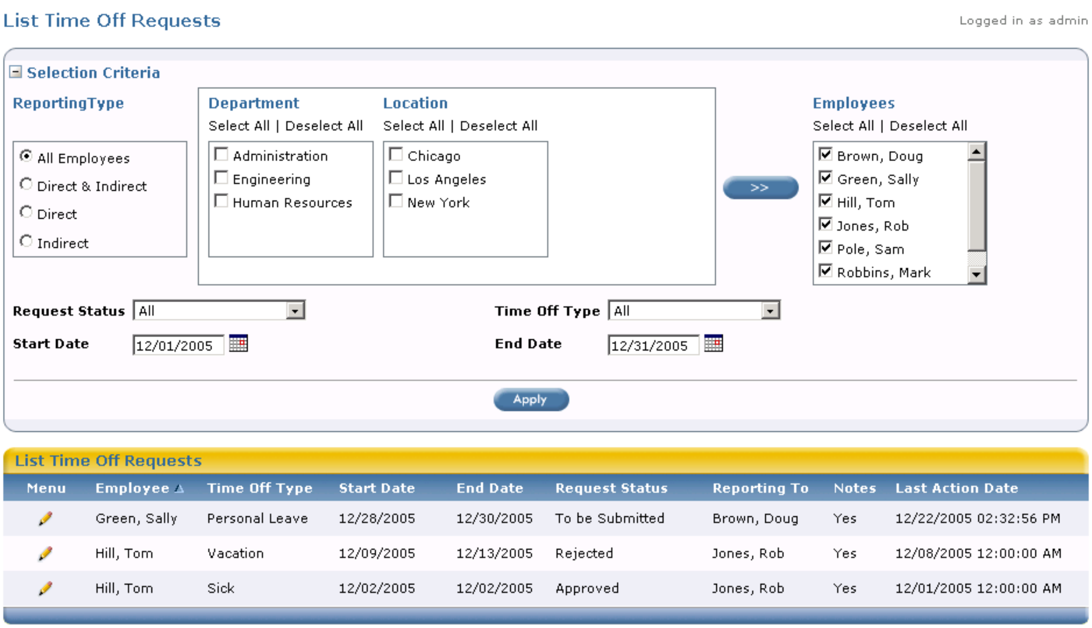
To drop down the time off menu, select **Time Off** from the main menu.



List Time Off Requests

To view the list of time off requests:

1. Select **Time Off** from the main menu and click **List Time Off Requests**. The **List Time Off Requests** screen is displayed.



2. In the selection criteria section, do the following:
   - Select the **Reporting Type**, and if required, the **Department** and **Location**.
   - From the **Employees** list, select the employees for whom you want to view time off information.
   - Select the **Request Status** from the drop-down list.

     The request status options are:

     - All

        - To be Submitted
        - Waiting for Approval
        - 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.

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
- Submit time off request

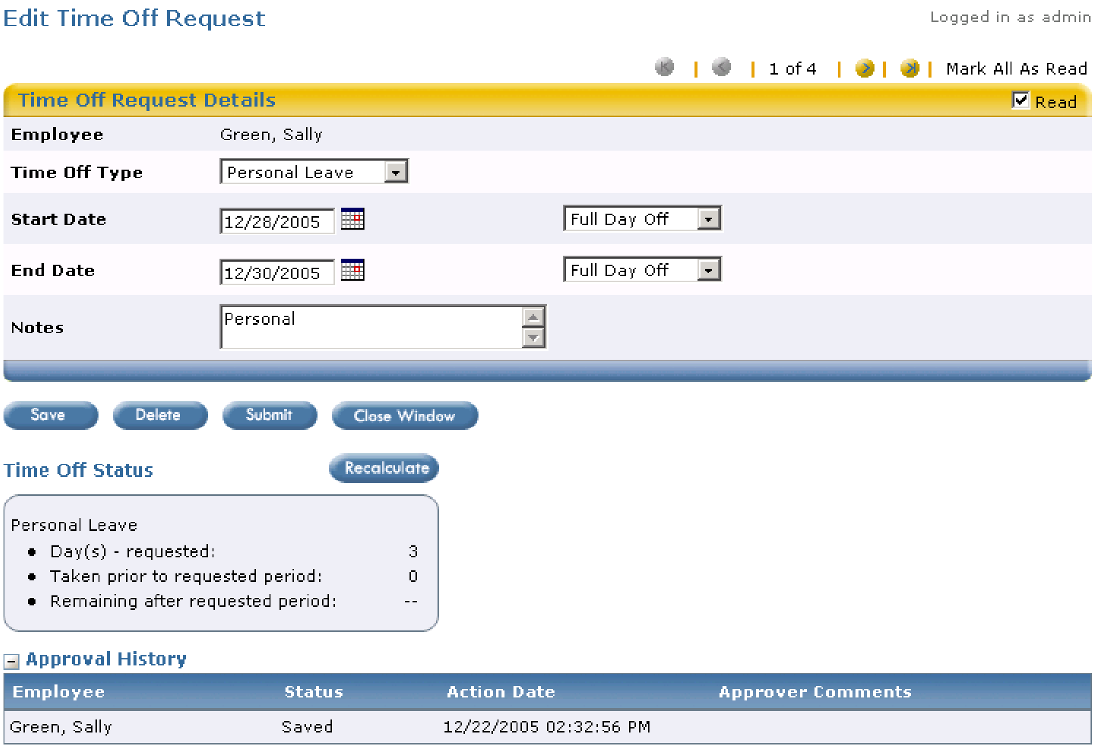
Edit time off request

You can edit a time off request only if the approval status is To be Submitted or Rejected. The time off request can be edited from the **List Time Off Request** screen.

To edit a time off request:

1. Select **Time Off** from the main menu and click **List Time Off Requests**. The **List Time Off Requests** screen is displayed.
2. From the **Selection Criteria**, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. Select the **Request Status** and the **Time Off Type** from the drop-down lists.
5. Select **Start Date** and **End Date** using the icon.
6. Click **Apply**. The list of time off requests is displayed, based on the criteria you selected.

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



***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.*

8. Edit the time off request details.
9. If you want to save the time off request, click **Save**.
10. If you want to submit the time off request, click **Submit**.
11. If you want to delete the time off request, click **Delete**.
12. Click **Close Window** to return to the **List Time Off Requests** screen.
13. Click **Refresh** to display the updated time off status.
14. Under Time Off Status, you can review the following information:
    - **Day(s) Requested** displays the number of working days that the time off request covers.
    - **Taken Prior to Requested Period** shows how many days off the employee has previously taken in this time off type.

- **Remaining After Requested Period** shows how many days are available to the employee after this time off request is taken. If the time off exceeds the allotted time for the respective time off type, then the days remaining in this row will be displayed in red.

The Approval History shows the life cycle of a time off request, including information on when the time off request was submitted, and the time and date that it was approved or rejected.

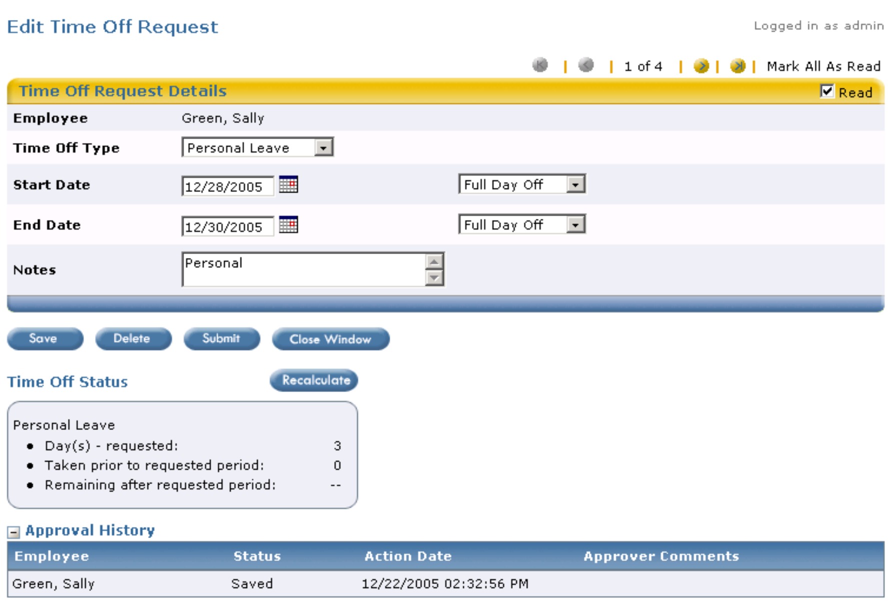
Note: *If the System Preferences are set to track time off in hours, the Historical Time Off page will display the information in hours instead of days.*

Submit a Time Off Request

You can submit a time off request only if the approval status is To be Submitted or Rejected.

To submit a time off request:

1. Select **Time Off** from the main menu and click **List Time Off Requests**. The **List Time Off Requests** screen is displayed..
2. Select the **Request 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 To be Submitted. The **Edit Time Off Request** pop-up window is displayed.



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 any time off request details that you would like to change.
7. If you want to resubmit the time off request, click **Submit.**
8. Click **Cancel** to return to the **List Time Offs Requests** screen.
9. Under Time Off Status, you can review the following information:
   - **Day(s) Requested** displays the number of working days that the time off request covers.
   - **Taken Prior to Requested Period** shows how many days off the employee has previously taken in this time off type.
   - **Remaining After Requested Period** shows how many days are available to the employee after this time off request is taken. If the time off exceeds the allotted time for the respective time off type, then the days remaining in this row will be displayed in red.

The Approval History shows the life cycle of a time off request, including information on when the time off request was submitted, and the time and date that it was approved or rejected.

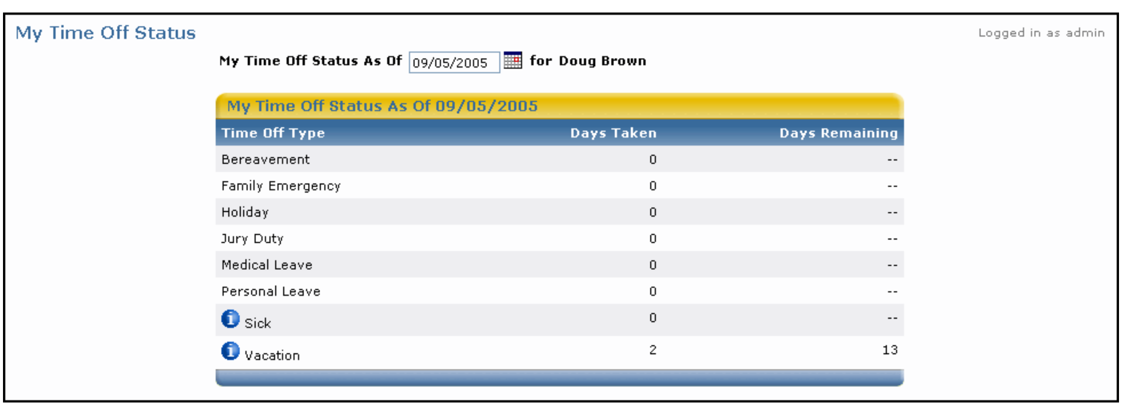
Note: *If the System Preferences are set to track time off in hours, the Historical Time Off page will display the information in hours instead of days.*

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. Select **Time Off** from the main menu and click **My Time Off Status.** The **My Time Off Status** screen is displayed.



My Time Off Status

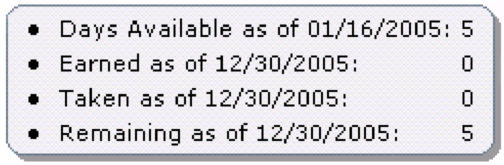
Logged in as admin

My Time Off Status As Of 09/05/2005 for Doug Brown

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** 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 as of** 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

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.*

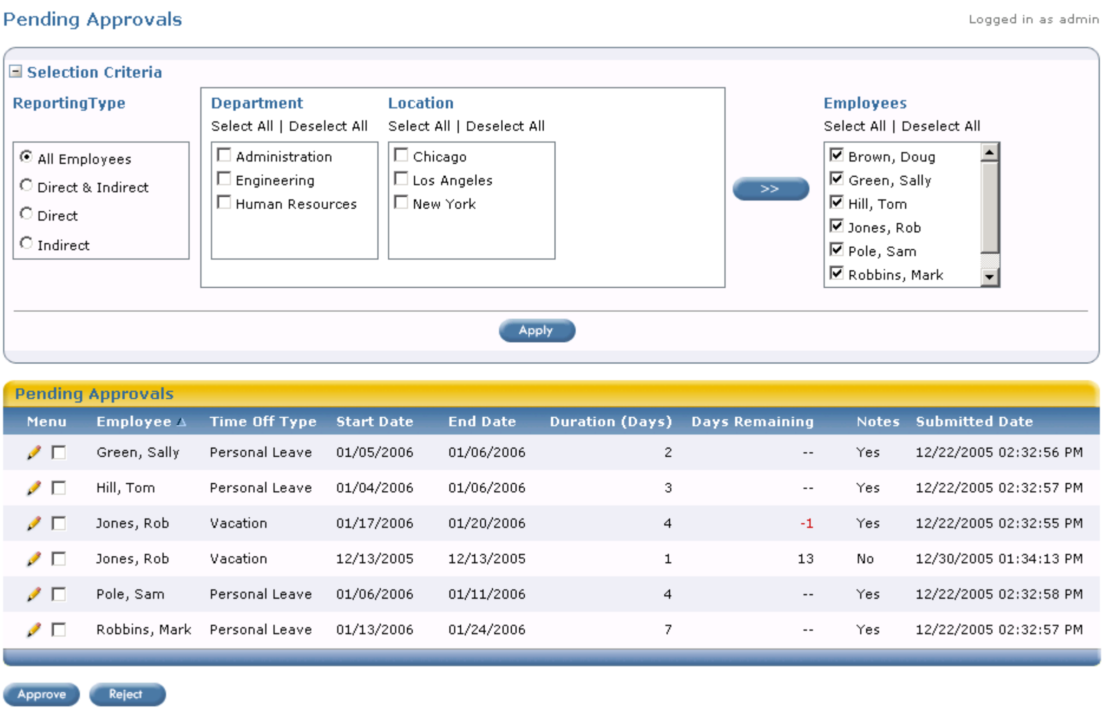
Approvals

To drop down the approvals menu, select **Approvals** from the main menu.

Pending Approvals

To view a list of time off requests pending approval:

1. Select **Approvals** from the main menu and click **Pending Approvals**. The **Pending Approvals** screen is displayed.



Menu	Employee	Time Off Type	Start Date	End Date	Duration (Days)	Days Remaining	Notes	Submitted Date
	Green, Sally	Personal Leave	01/05/2006	01/06/2006	2	--	Yes	12/22/2005 02:32:56 PM
	Hill, Tom	Personal Leave	01/04/2006	01/06/2006	3	--	Yes	12/22/2005 02:32:57 PM
	Jones, Rob	Vacation	01/17/2006	01/20/2006	4	-1	Yes	12/22/2005 02:32:55 PM
	Jones, Rob	Vacation	12/13/2005	12/13/2005	1	13	No	12/30/2005 01:34:13 PM
	Pole, Sam	Personal Leave	01/06/2006	01/11/2006	4	--	Yes	12/22/2005 02:32:58 PM
	Robbins, Mark	Personal Leave	01/13/2006	01/24/2006	7	--	Yes	12/22/2005 02:32:57 PM

2. From the **Selection Criteria**, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. To approve a time off request, check the check box next to the time off request you want to want to approve and click **Approve.**

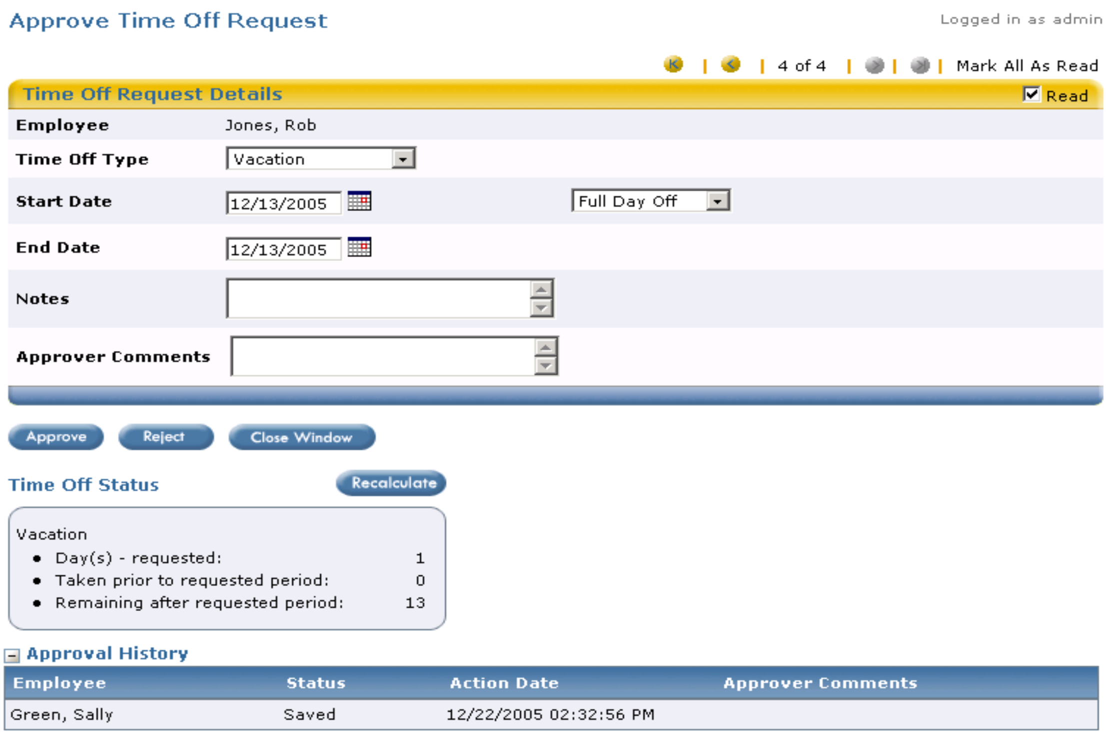
5. To reject a time off request, check the check box next to the time off request you want to reject and click **Reject.**
6. To edit a time off request from the pending approvals section, click the icon next to the time off request you want to edit. You can also approve or reject the time off request from the edit page.

Approve or Reject a Time Off Request

You can approve a time off request from any of the calendar views or from List Time off Requests or from the Historical Time Off Requests.

To approve or reject a time off request:

1. On the **Approve Time Off Request** pop-up window, you can verify the time off request details.



2. Under **Time Off Request Details,** to edit the time off request details before approving, do the following:
   - To edit the **Time Off Type,** select the time off type form the drop-down list.
   - To edit the **Start Date** and the **End Date**, select the date using the icon.
   - To edit the **Notes,** enter the appropriate note in the notes field.

- Enter your comments before you approve or reject the time off request in the **Approver Comments** field.

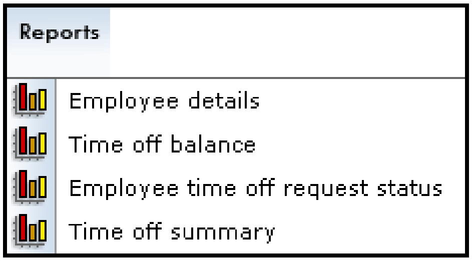
3. Click **Approve** to approve the time off request and **Reject** to reject the time off request.
4. Click **Refresh** to display the updated time off status.
5. Under Time Off Status, you can review the following information:
   - **Day(s) Requested** displays the number of working days that the time off request covers.
   - **Taken Prior to Requested Period** shows how many days off the employee has previously taken in this time off type.
   - **Remaining After Requested Period** shows how many days are available to the employee after this time off request is taken. If the time off exceeds the allotted time for the respective time off type, then the days remaining in this row will be displayed in red.

The Approval History shows the life cycle of a time off request, including information on when the time off request was submitted, and the time and date that it was approved or rejected.

Note: *If the System Preferences are set to track time off in hours, the Historical Time Off page will display the information in hours instead of days.*

Reports

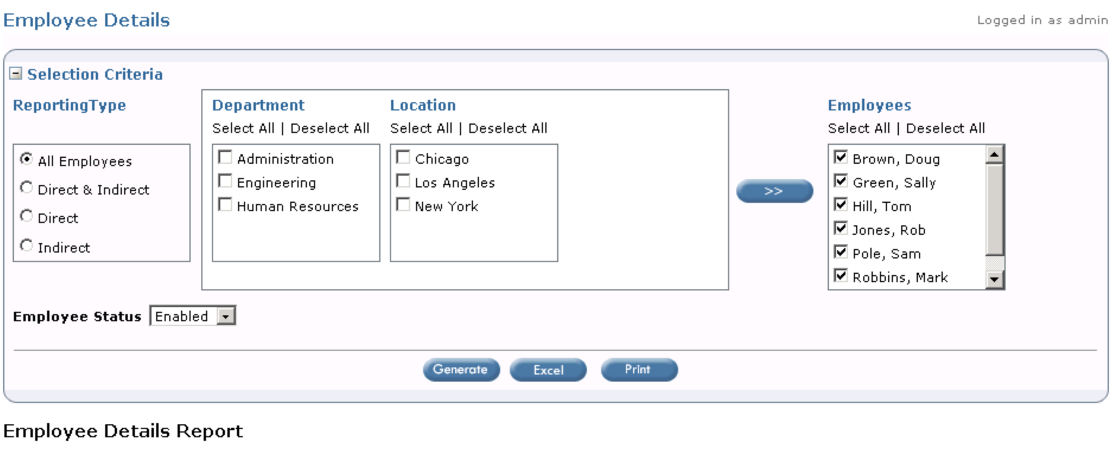
To drop down the reports menu, select Reports from the main menu.



Employee Details Report

To view a report showing the configuration information for selected employees:

1. Select **Reports** from the main menu and click **Employee Details.** The **Employee Details Report** screen is displayed.



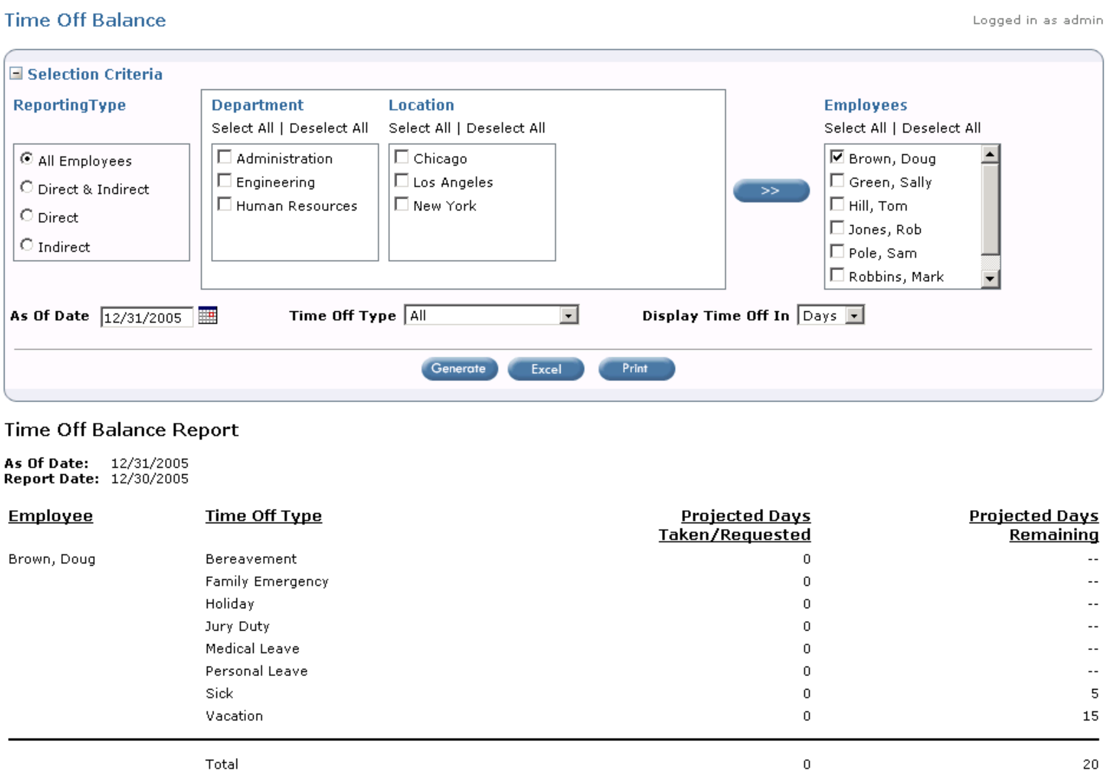
Employee	Employee Id	User Name	E-mail	Reporting To	Enabled	Employee Type	Date Hired	Category\Group
Brown, Doug	100	admin	doug@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	01/16/2005	\Department\Administration, \Location\New York
Green, Sally	102	sally	sally@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	01/16/2005	\Department\Human Resources, \Location\New York
Hill, Tom	201	tom	tom@yourcompany.com	Jones, Rob	Yes	Full-time Salaried	01/16/2005	\Department\Engineering, \Location\New York
Jones, Rob	101	rob	rob@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	01/16/2005	\Department\Engineering, \Location\New York
Pole, Sam	203	sam	sam@yourcompany.com	Jones, Rob	Yes	Full-time Salaried	01/16/2005	\Department\Engineering, \Location\New York
Robbins, Mark	200	mark	mark@yourcompany.com	Jones, Rob	Yes	Full-time Salaried	01/16/2005	\Department\Engineering, \Location\New York
Young, Frank	204	frank	frank@yourcompany.com	Brown, Doug	Yes	Full-time Salaried	01/16/2005	\Department\Engineering, \Location\New York

2. From the **Selection Criteria**, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. To view and generate a report of all the employees whose accounts are activated in the application, select Enabled in the **Employee Status** option.
5. To view and generate a report with employees who are not enabled in the application, select Disabled in the **Employee Status** option.
6. 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.
7. Click **Generate** to view the report.
8. To save the report to an external Microsoft Excel file, click **Excel.**
9. To print the report, click **Print.** A preview of the report to be printed is displayed and can be confirmed by clicking **OK** on the Print dialogue

Time Off Balance Report

To view the balance for a particular date for selected time off types and employees:

1. Select **Reports** from the main menu and click **Time Off balance**.The **Time Off Balance** screen is displayed.



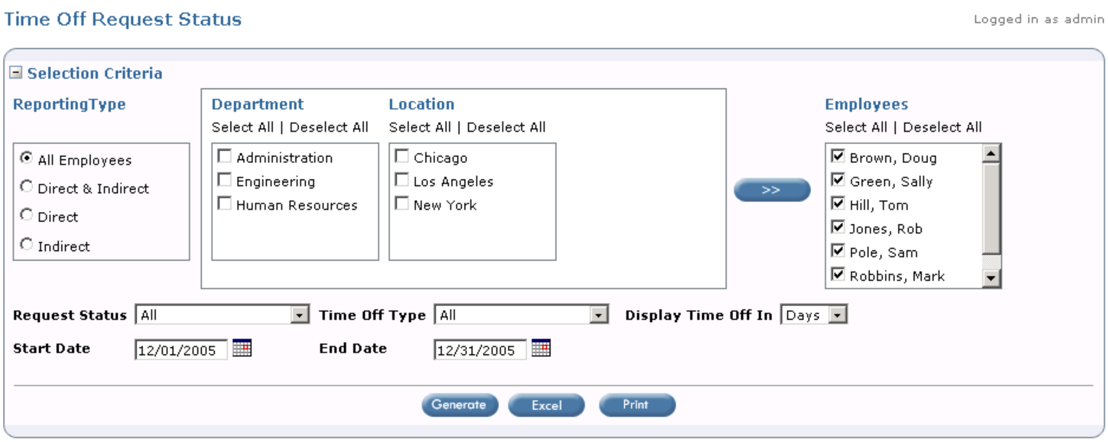
Employee	Time Off Type	Projected Days Taken/Requested	Projected Days Remaining
Brown, Doug	Bereavement	0	--
	Family Emergency	0	--
	Holiday	0	--
	Jury Duty	0	--
	Medical Leave	0	--
	Personal Leave	0	--
	Sick	0	5
	Vacation	0	15
	Total	0	20

2. From the **Selection Criteria** field, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. Select the **As Of** date using the icon. You can select a date up to 50 years from today's date. Select a **Time Off Type** from the drop-down list and click Generate.
5. Click **Generate** to view the report.
6. To save the report to an external Microsoft Excel file, click **Excel.**
7. To print the report, click **Print.** A preview of the report to be printed is displayed and can be confirmed by clicking **OK** on the Print dialogue

Time Off Request Status

To view the time of requests for a specified date range for selected employees:

1. Select **Reports** from the main menu and click **Time Off Request Status.** The **Time Off Request Report** screen is displayed.



Time Off Request Status Report

Date Range: 12/01/2005-12/31/2005
Report Date: 12/30/2005 **Request Status:** All

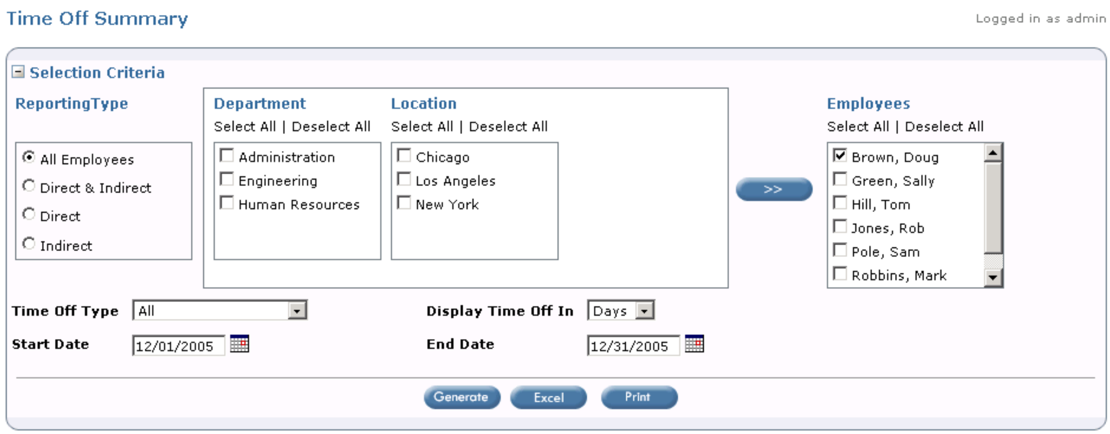
Employee	Reporting To	Time Off Type	Requested Start Date	Requested End Date	Requested Duration (Days)	Request Status
Green, Sally	Brown, Doug	Personal Leave	12/28/2005	12/30/2005	3	To be Submitted
Hill, Tom	Jones, Rob	Vacation	12/09/2005	12/13/2005	3	Rejected
		Sick	12/02/2005	12/02/2005	1	Approved
Jones, Rob	Brown, Doug	Vacation	12/13/2005	12/13/2005	1	Waiting for Approval

2. From the **Selection Criteria** field, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. Select the **Request Status**, **Time Off Type** and **Display Time Off In** from the drop-down lists.
5. Select a **Start Date** and a **End Date** using the icon and click **Generate.**
6. Click **Generate** to view the report.
7. To save the report to an external Microsoft Excel file, click **Excel.**
8. To print the report, click **Print.** A preview of the report to be printed is displayed and can be confirmed by clicking **OK** on the Print dialogue

Time Off Summary

To view a summary of the utilization of selected time off types and employees over a specified date range:

1. Select **Reports** from the main menu and click **Time Off Summary.** The **Time Off Summary** screen is displayed.



Time Off Summary Report

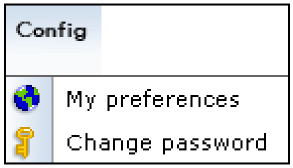
Date Range: 12/01/2005-12/31/2005
Report Date: 12/30/2005

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	--	0	15
	Total	20	0	0	--	0	20

2. From the **Selection Criteria** field, select the **Reporting Type**, and if required, the **Department** and **Location**.
3. From the **Employees** list, select the employees for whom you want to view time off information.
4. Select **Request Status**, **Time Off Type** and **Display Time Off In** from the drop-down lists. Select a **Start Date** and a **End Date** using the icon, and click **Generate.** The date selected can be up to 50 years from today's date.
5. Click **Generate** to view the report.
6. To save the report to an external Microsoft Excel file, click **Excel.**
7. To print the report, click **Print.** A preview of the report to be printed is displayed and can be confirmed by clicking **OK** on the Print dialogue

Configuration

To drop down the configuration menu, select Configuration from the main menu.



My Preferences

To edit your preferences:

1. Select **Config** from the main menu and click **My Preferences.** The **My Preferences** screen is displayed.

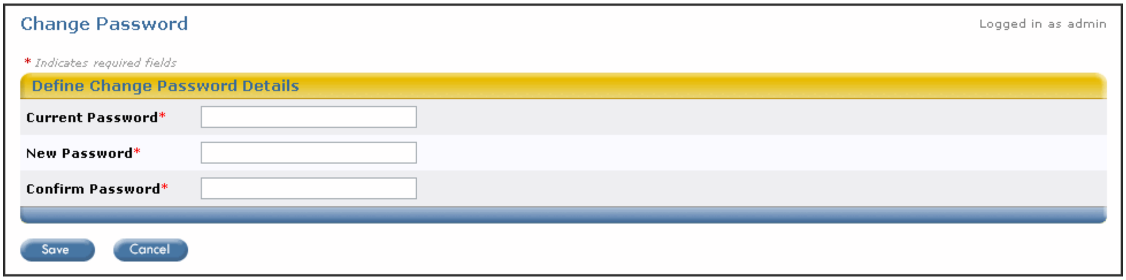
2. Select the **Date Format** from the drop-down list and enter the required number in the **Display Records per Page** field.
3. Click **Save** to save the changes.

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

Change My Password

To change your password:

1. Select **Config** from the main menu and click **Change My Password**. The **Change Password** screen is displayed.



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 exit without saving the changes.

Appendix A: Time Off Scenarios

The time off scenarios are used to explain the different instances of time off, and the calculation of remaining days. The days remaining are 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 (they are not retroactive). This means that if you are implementing accruals on June 1st, for example, you should set up the Initial Balance 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 initial balance, accruals and reset are configured by the Administrator of Web TimeOff.*

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

- **Initial Balance:** The initial number of days given to the employee as of the effective date of the time off setting
- **Accrued Days:** The number of days earned over a period of time. The period can be weekly, monthly, semimonthly, or yearly, depending on the time off type. This is typically measured from the most recent reset date, or hire date.
- **Reset Gained:** The number of days gained by the employee at the most recent reset date.
- **Reset Lost:** The number of days lost by the employee at the most recent reset date.
- **Days Remaining:** Defined as (Initial Balance + Accrued Days + Reset Gained) – (Days Taken + Reset Lost).

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

  - John Smith joined the company on June 10, 2005.
  - Initial Balance as of June 10th – 12 days
  - Monthly Accrual on 9th of every month - 1 day
  - Yearly Reset on June 10th - 5 days

- **Scenario 1:**

  John submitted a time off request for June 20 and June 21, 2005. It was approved on June 21, 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 June 20, 2005 and June 21, 2005. It was approved on June 21, 2005. John withdraws the time off request on June 23, 2005 (time off can only be withdrawn after 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	0	12

- **Scenario 3:**

  John submitted a time off request for June 21, 2005 to June 24, 2005. He withdraws the time off request on June 23, 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	0	12

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

  John submitted a time off request for the period of June 21, 2005 to June 24, 2005. He withdraws the time off request on June 23, 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 5:**

John submitted a time off request for the period of June 21, 2005 to June 24, 2005. The time off request 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 of June 21, 2005 to June 24, 2005. He withdraws the time off request on June 23, 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
06/10/2005-07/30/2005	0	0	12	1	0	13

As John has withdrawn the time off request, the Days Taken is 0. But as the report is generated on July 10, 2005, he is entitled to 1 day of accrual, which happens on the 9th of every month. The reset gained and reset lost is 0.

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

  John submitted a time off request for June 21, 2006. The report is generated for the duration from June 1, 2006 to June 30, 2006. The report is generated on July 10, 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
06/01/2006-06/30/2006	18	19	5	1	1	4

A reset occurs on June 10, 2006, so the Initial Balance will be 18.

Initial Balance = [12 (Initial Balance of previous year) + 11 (accrued days) – 5 (time taken off this year)] = 18.

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

  John submitted a time off request for the period of June 29, 2006 to July 2, 2006, and it is approved. The date range for the report generated is June 1, 2006 to June 30, 2006. The report is generated on June 11, 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 is explained in Scenario 6. Accrued days is 1. Days taken is 2, because the report only shows up to June 30, 2006. Reset gained and reset lost remains the same as in Scenario 6.

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

  John submitted a time off request for the period of June 29th, 2006 to July 2, 2006. A reset occurs on June 10, 2005. John withdraws the time off request on June 30, 2005. The date range for the report generated is June 1, 2006 to June 30, 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	0	5

Appendix B

Sample Data

The sample data is available only for the demonstration version of Web TimeOff. Web Time Off has created a sample data with a definite organization structure with fixed workflow and realistic parameters defined, to make it easier for you to evaluate and understand Web TimeOff.

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

- Employee list
- Employee types
- Categories
- Time off types
- Permission types
- Holiday Calendars
- E-mail templates

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:

	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

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.

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 that will be available for the employees having permission type named Time Off User. The following is the list of categories and groups accessable to the employees of Nebula Inc.

	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, although they are identified as memebers of these groups.

Time Off Types:

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

The time off types list is as follows:

- Bereavement
- Family emergency
- Jury duty

- Medical leave
- Personal leave
- Sick
- Vacation

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 most senior 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 hire 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 occurs on the 1st of January.

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

	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

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.

	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

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

E-mail Notifications:

The e-mail notifications can be edited but cannot be added/deleted. The standard 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.

	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
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