



*Web Time Off Management
User Guide*

from REPLICON

version 1.5



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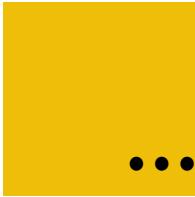
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Chapter 1

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 approval. Using the calendar views, you can review the time off status for a single employee, or your entire team, depending on your user permissions.

Web TimeOff also includes pre-defined 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 the permission type assigned to you includes the ability to approve requests, 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time off requests of you and your team, as well as the time off requests that have already been approved, rejected or withdrawn.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 group.

If you are an employee with basic user permissions, 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 group.

- **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.

- **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 is included in the demonstration version to allow you to evaluate Web TimeOff while avoiding 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 pages, 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 and log in to 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 [System Requirements](#) on page 9). 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 day 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
 - 512 MB memory
 - 50 MB 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
 - 256 MB memory
- Minimum screen resolution of 1024 x 768
- 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](#) on page 13 for browser configuration information.

Recommended System Requirements

Web TimeOff Server

- Hardware requirements:

No. of Users	Requirements
Under 50 users	<ul style="list-style-type: none"> • PC with Pentium 500 MHz CPU or equivalent • 1 GB memory • 50 MB available disk space
50 to 200 users	<ul style="list-style-type: none"> • PC with Pentium 1 GHz CPU or equivalent • 1 GB memory • 50 MB available disk space
200 + users	<ul style="list-style-type: none"> • PC with Pentium 2GHz or equivalent • 1 GB+ memory • 50 MB available disk space

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

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

Web TimeOff Database Server

- Hardware requirements:

No. of Users	Requirements
Under 50 users	<ul style="list-style-type: none">• PC with Pentium 500 MHz CPU or equivalent• 1 GB memory• 50 MB available disk space
50 to 200 users	<ul style="list-style-type: none">• PC with Pentium 1GHz CPU or equivalent• 1 GB memory• 50 MB available disk space
200 + users	<ul style="list-style-type: none">• PC with Pentium 2GHz or equivalent• 1 GB+ memory• 50 MB 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
 - 512 MB memory
 - 50 MB 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](#) on page 13 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 [System Requirements](#) on page 9.

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 [System Requirements](#) on page 9.

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

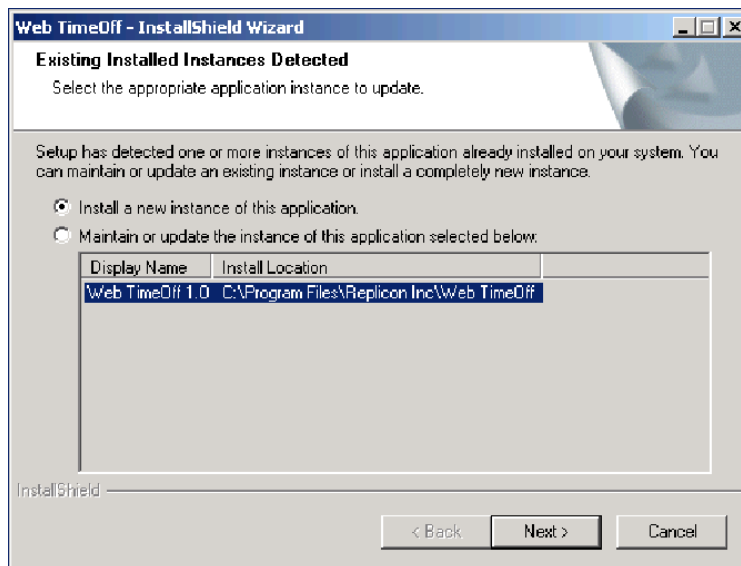
The software for both the demonstration version and the full version of Web TimeOff is available from the Replicon web site.

You can either save the installation program to your local computer or run the installation directly. 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.

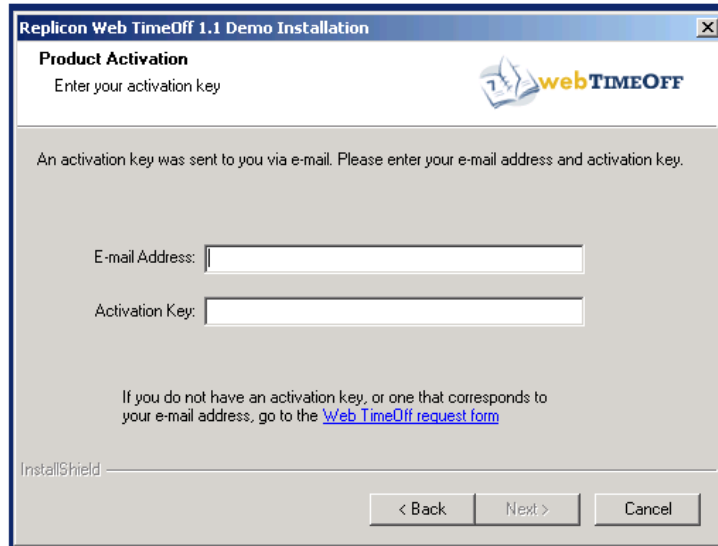
Select the installation option you want and click **Next** to continue.



To complete the installation, continue on to the appropriate section:

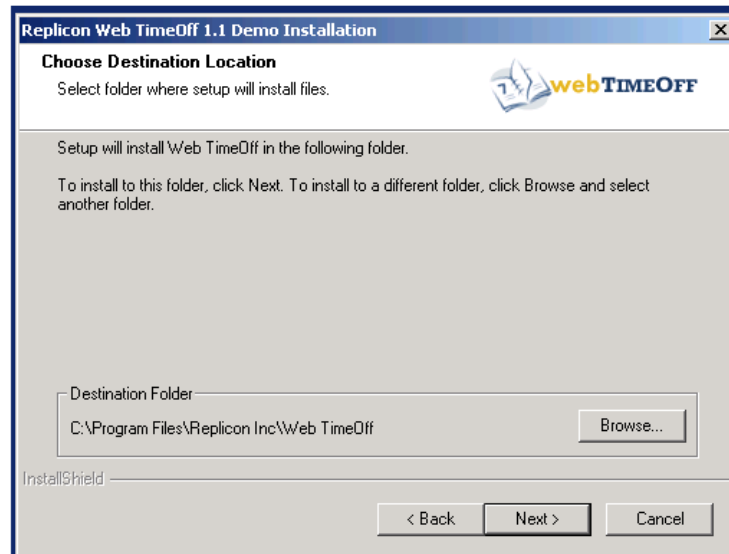
- [Installing the Demonstration Version](#) on page 15
- [Installing the Full Version](#) on page 19

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**.

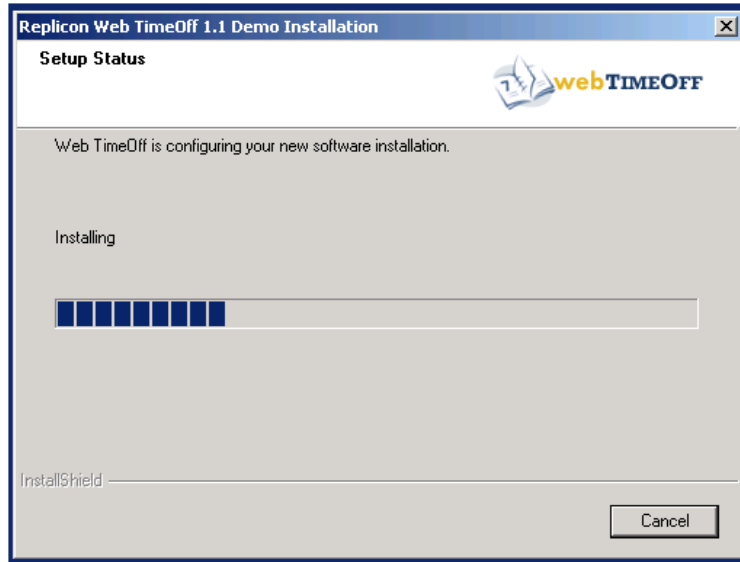


Note: If you do not have an activation key, click the **Web TimeOff request form** link, and enter the details. The activation key will be sent to your e-mail address.

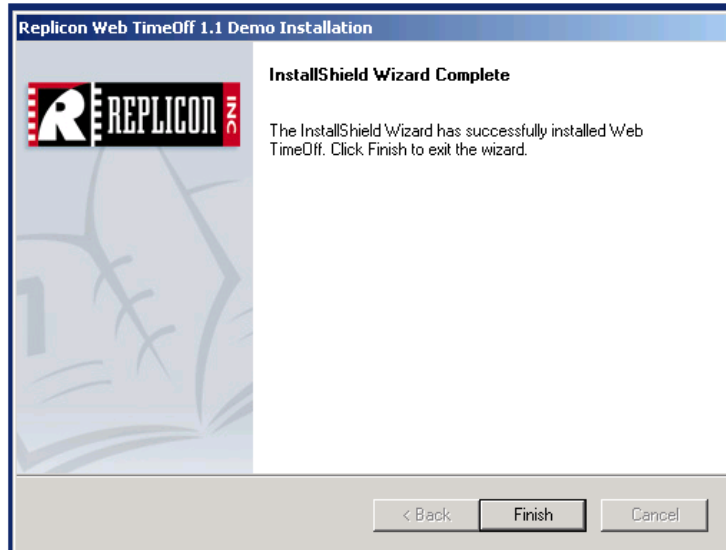
4. Choose an installation location (or simply leave the default) and click **Next**.



7. Wait for the software to be installed.

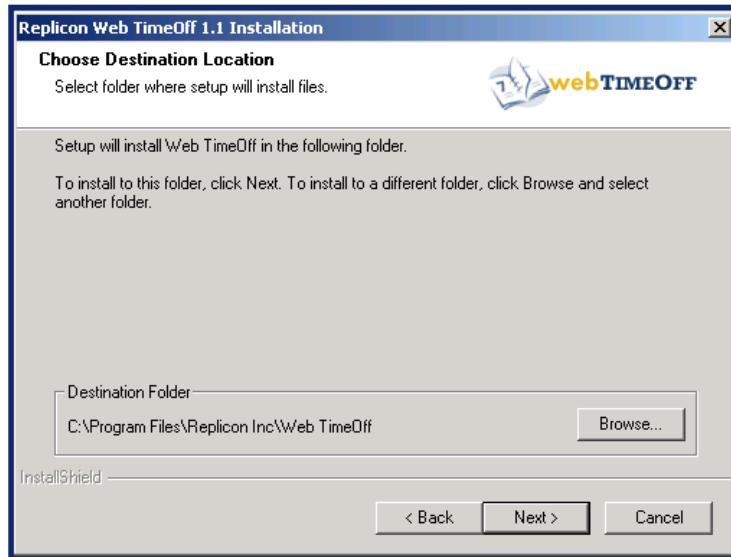


8. When the installation is complete, click **Finish**.

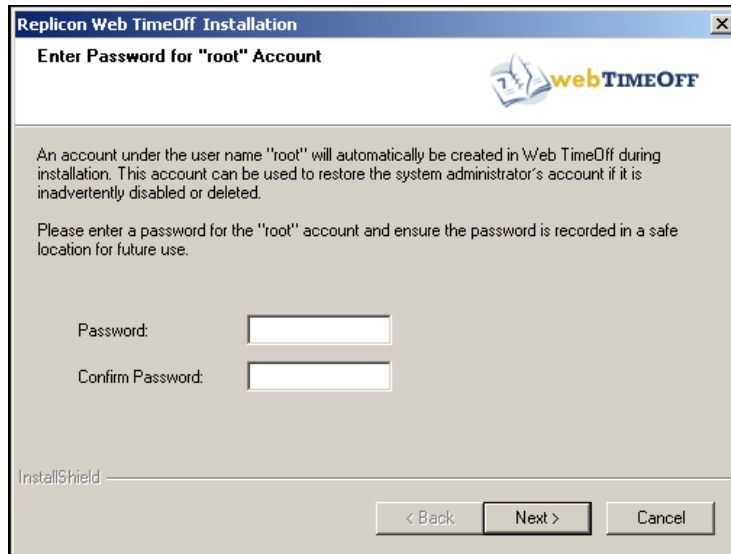


9. The Web TimeOff software log in page will open in a browser. For more information on what to do next, continue to the section [Logging In for the First Time](#) on page 24.

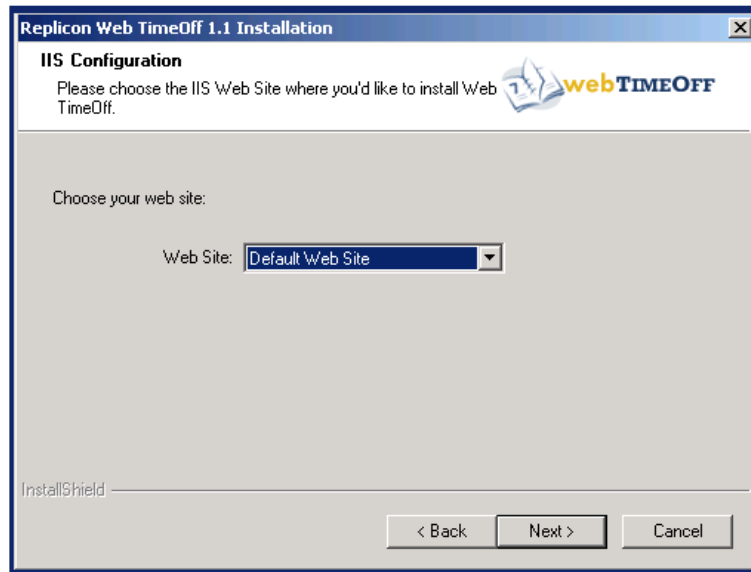
3. Choose an installation location (or simply leave the default) and click **Next**.



4. Enter a password for the "root" user account, which will be created during installation, and click **Next**. This account can be used to restore the system administrator's account if it is inadvertently disabled or deleted. For more information on the "root" account, see [Root User Account](#) on page 114.

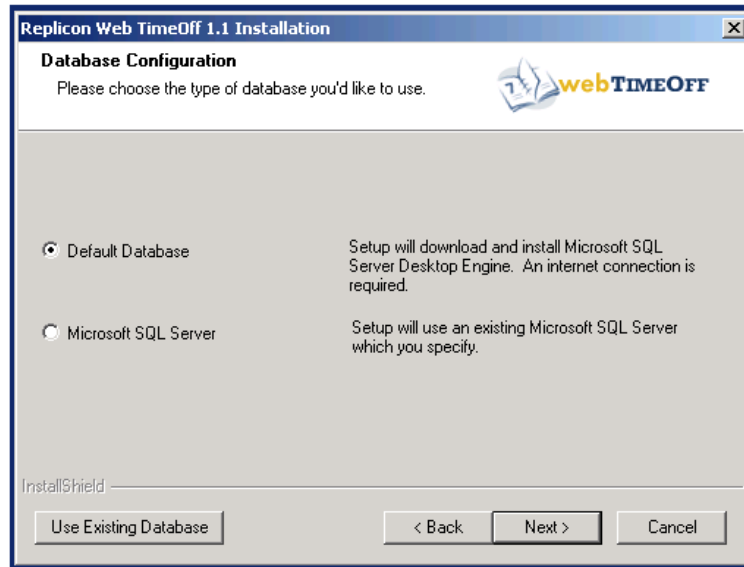


5. Choose the web site where you want to install Web TimeOff, and choose your log in authentication, and click **Next**.

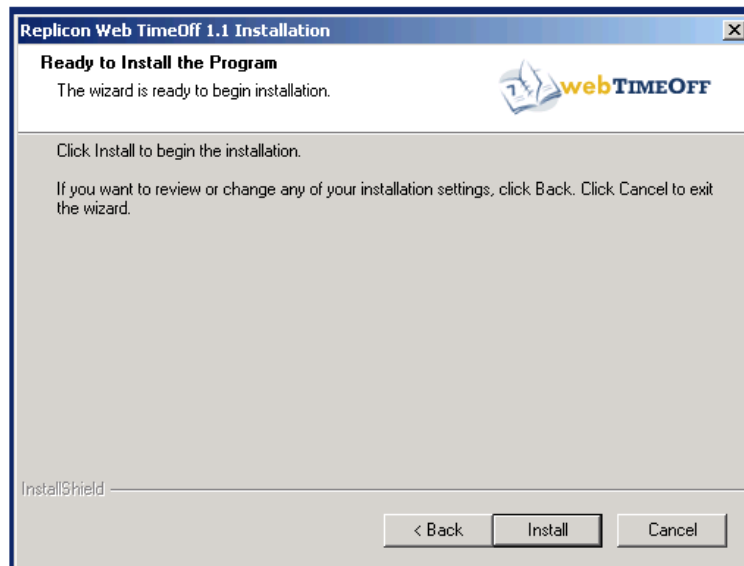


6. Select the database you want to use, or click **Use Existing Database** to use a pre-installed database.
 - If you select Default Database, the installation program will install the Microsoft SQL Server Desktop Engine (MSDE).
 - If you select Microsoft SQL Server, you will be asked to specify the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

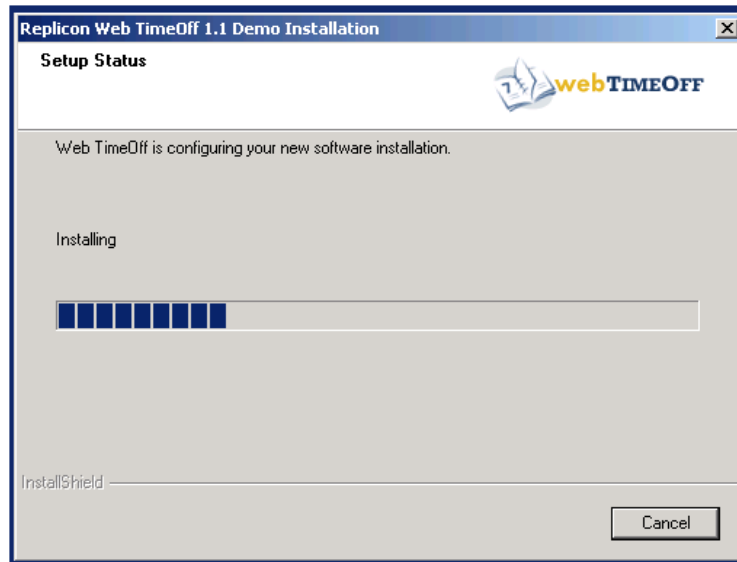
When you are done, click **Next**.



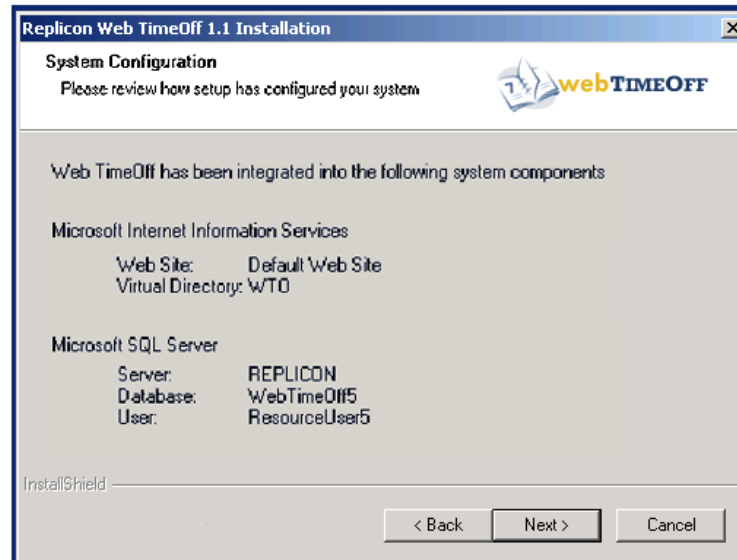
7. You are ready to install the software. Click **Install**.



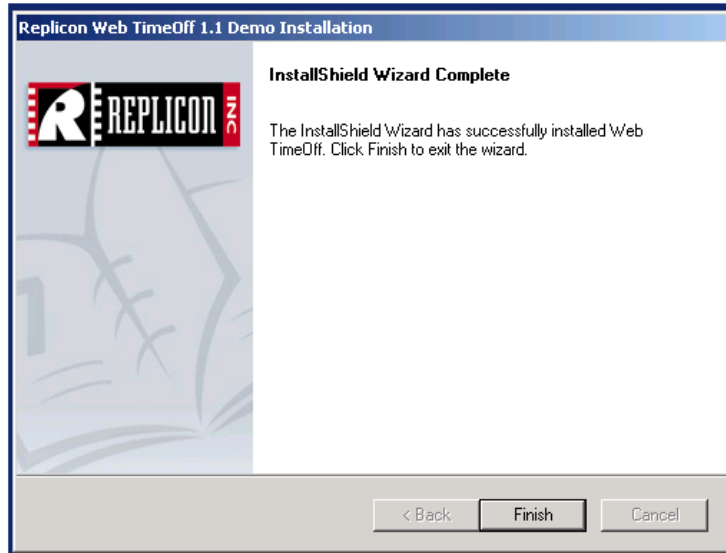
8. Allow the program to install the software.



9. Review the system configuration details. If this is OK, click **Next**.



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

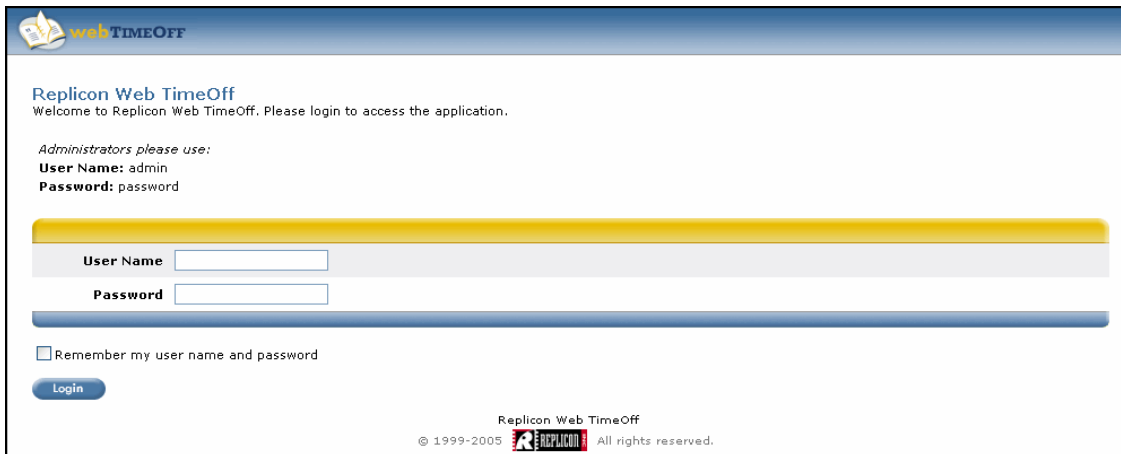


11. The Web TimeOff log in page will open in a browser.

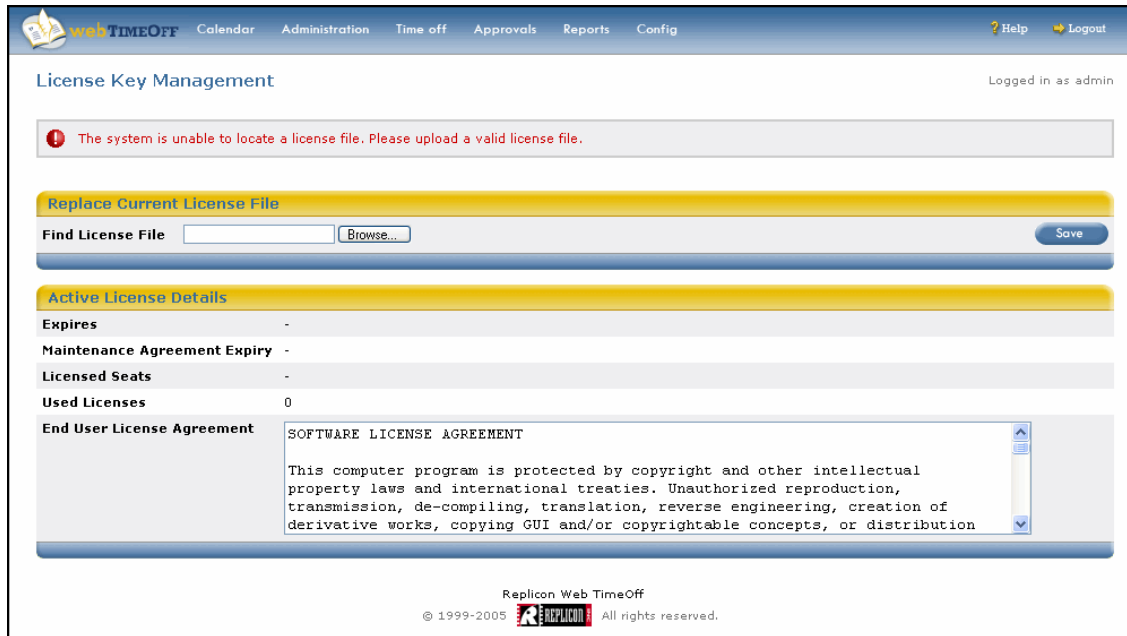
Logging In for the First Time

When you have finished installing the software, you will be prompted to log in to Web TimeOff. This first page may take a few seconds to appear.

1. You can log in for the first time as `admin` with the password `password`. When you have entered your **User Name** and **Password**, click the **Login** button.



2. If you installed the demonstration version, the main Web TimeOff page will be displayed. Continue on to [Chapter 3, Using Web TimeOff](#) on page 26 for information on working with Web TimeOff. If you installed the full version, the **License Key Management** page 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 e-mail.

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** page will be refreshed with your license details.

Chapter 3

Using Web TimeOff

This chapter describes how to use Web TimeOff.

Logging In

To log in to Web TimeOff.

1. Launch Web TimeOff as follows:

- 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 log in page is displayed.

webTIMEOFF

Replicon Web TimeOff
Welcome to Replicon Web TimeOff. Please login to access the application.

User Name

Password

Remember my user name and password

Login

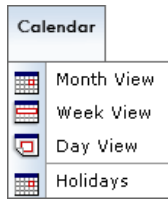
Replicon Web TimeOff
© 1999-2005 All rights reserved.

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

Note: Passwords are case sensitive.

Calendar

To open the **Calendar** menu, select **Calendar** from menu bar at the top of the page.



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 assigned a permission type that includes **Time Off Visibility/Approval/Entry**, you will have two tabs available to you – the **Shared Calendar** and the **Approval Calendar**. The **Approval Calendar** will allow you to take action against 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 basic 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.

Working with the Calendar

This section summarizes how you can control the calendar view.


New Tasks

The  icon in the upper, right corner of the page 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.

Filtering Employees using Selection Criteria

The **Selection Criteria** area allows you to filter the employees for whom requests are displayed in the **Approval Calendar**. The ability to filter employees using the **Selection Criteria** section is only provided if the permission type assigned to you includes **Time Off Visibility/Approval/Entry** at the **Supervisor** level and you have employees reporting to you or includes **Time Off Visibility/Approval/Entry** at the **All Employees** level.


To filter the employees displayed:

1. If the **Selection Criteria** area is not already expanded, select **Selection Criteria** or the  icon.
2. Select the **Reporting Type** you would like to filter for. You can choose to show all of the employees or only those who report directly to you, who report indirectly to you, or who are both direct and indirect reporting employees.

The 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.

- To select only those employees within specific groups, check the appropriate boxes under each **Category**. You will only be able to filter by groups that are accessible under the permission type assigned to you.
- Select the  button. The employees associated with the reporting type and groups you selected will be displayed in the **Employees** list box. The current user's name will always be displayed in the **Employees** list, in order to enable the employee to view the time off requests and generate reports.
- To select specific employees, enable or disable the check boxes in the **Employees** list box as necessary.






- Select **Apply**. The page will be updated with the employees 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.

Mini Calendar

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

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

Color Legend

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

Day View

Select **Day View** to display the **View Time Off for the Day** calendar, which allows you to see all of your own time off requests, as well as requests for any employees you selected in the **Selection Criteria** section, for a specific calendar day.

For further information about using the **Selection Criteria** area, refer to [Filtering Employees using Selection Criteria](#) on page 28.

View Time Off for the Day

Logged in as: admin

5 Unread Request(s)

March	2006	Go					
March 2006							
Su	Mo	Tu	We	Th	Fr	Sa	
>	26	27	28	1	2	3	4
>	5	6	7	8	9	10	11
>	12	13	14	15	16	17	18
>	19	20	21	22	23	24	25
>	26	27	28	29	30	31	1
>	2	3	4	5	6	7	8

Time Off Requests

- To be Submitted
- Waiting for Approval
- Approved
- Rejected

Shared Calendar Approval Calendar

03/22/2006

Wednesday, 22 March 2006

- In the **Employee Comments** field, enter a text description that more clearly explains the time off request, if necessary.
5. Click **Recalculate** to display the new time off request in the **Time Off Status** section at the bottom of the page.
 6. Under **Time Off Status**, you can review the following information:
 - **Day(s)/Hour(s) requested** displays the amount of working time that the time off request covers.
 - **Taken prior to requested period** shows the amount of time off the employee has previously taken in this time off type.
 - **Remaining after requested period** shows the amount of time remaining 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, this value will be red.
 7. 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 **Close Window**.

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

Selecting an Employee for a Time Off Request

The **Employee** drop-down list in the **Request Time Off** page enables you to easily select an employee from a large user list. The number of employees displayed in the drop-down list is specified in the **System Preferences**.

To find and select an employee:

1. In the **Request Time Off** page of a time off request, select **More...** from the **Employee** drop-down list.

Viewing a Time Off Request

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 colored 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 color in the calendar view.
 - Close Window
Closes the time off request without saving your changes.

Approving or Rejecting a Time Off Request

If you have approval permissions, you can use the calendar to approve or reject any submitted time off request for the employees you supervise. 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 colored 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 page.

Viewing Holiday Dates

To view a list of holiday dates in a holiday calendar:





1. Select **Holidays** from the **Calendar** menu.

The **List Holidays** page displays the list of holidays in your holiday calendar.

List Holidays

Logged in as admin

Select Holiday Calendar: Year:

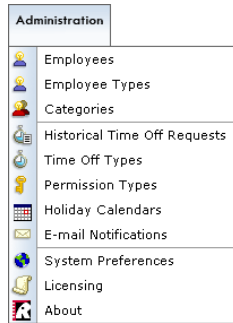
Holidays for United States-2006		
Holiday Date ▲		Description
01/02/2006 (Monday)		New Year's Day
01/16/2006 (Monday)		Martin Luther King's Day
02/20/2006 (Monday)		President's Day
05/29/2006 (Monday)		Memorial Day
07/04/2006 (Tuesday)		Independence Day
09/04/2006 (Monday)		Labor Day
10/09/2006 (Monday)		Columbus Day
11/10/2006 (Friday)		Veterans Day
11/23/2006 (Thursday)		Thanksgiving Day
12/25/2006 (Monday)		Christmas Day

[Close Window](#)

2. 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.
3. Click **Close Window** to close the **List Holidays** page.

Administration

To view the **Administration** menu, select **Administration** from the menu bar at the top of the page.



Working with Employees

Employees can be added, edited, or deleted in Web TimeOff, if the permission type assigned to you allows for it. Each employee can be configured in detail, with permission types, categories, and time off types assigned. The settings for a time off type, including initial balances, carry over of existing balances, accruals, and resets can be customized for each employee as well.

To view a list of employees currently entered in the system:

1. Select **Employees** from the **Administration** menu.

The **List Employees** page is displayed.

List Employees

Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All

Administration
 Engineering
 Human Resources

Location
Select All | Deselect All















Chicago
 Los Angeles
 New York

Employees
Select All | Deselect All

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

Employee Status Enabled **Permission Type** All

Apply

Employee List							
Menu	First Name	Last Name	User Name	Employee ID	E-mail	Enabled	
 	Doug	Brown	admin	100	doug@yourcompany.com	Yes	
 	Frank	Young	frank	204	frank@yourcompany.com	Yes	
 	Mark	Robbins	mark	200	mark@yourcompany.com	Yes	
 	Rob	Jones	rob	101	rob@yourcompany.com	Yes	
 	Sally	Green	sally	102	sally@yourcompany.com	Yes	
 	Sam	Pole	sam	203	sam@yourcompany.com	Yes	
 	Tom	Hill	tom	201	tom@yourcompany.com	Yes	

Add Import


2. If you wish, you can filter the employees shown as follows:

- Select the criteria by which to filter the employees using the **Selection Criteria** section. Refer to [Filtering Employees using Selection Criteria](#) on page 28 for more information.
- Select the **Employee Status** and the **Permission Type** to use for filters from the drop-down lists provided.

3. Select **Apply**.

The employees matching the selected criteria will be displayed.


To edit an employee:

1. Within the **List Employees** page, select the  icon next to the employee you want to edit. You can also edit an employee by clicking on the employee's name.
2. Make any necessary changes to the employee details, as well as **Employment Information, Permission Types, Categories, Time Off Types** and **E-mail Notifications** for this employee.
3. Select **Save** to save your changes. To exit without saving, select **Cancel**.

To edit the time off settings for an employee, including balances, accruals, and resets:

- Follow the steps outlined in [Editing Time Off Settings for an Employee](#) on page 49.

To delete an employee:

- Within the **List Employees** page, select the  icon next to the employee you want to delete. A confirmation message will be displayed. Deleting an employee is a permanent action.

To add an employee:

- Follow the instructions given in [Adding an Employee](#) on page 42.

To add a large number of employees at once:

- Follow the steps outlined in [Importing Employees](#) on page 53.

Adding an Employee

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 **Employees** from the **Administration** menu.
2. On the **List Employees** page, click the **Add** button. The **Add Employee** page is displayed.

Add Employee

Logged in as admin

** Indicates required fields*

Define Employee Details			
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
E-mail	<input type="text"/>	Enabled	<input checked="" type="checkbox"/>
Employee ID	<input type="text"/>		
Login Information			
User Name*	<input type="text"/>		
Password*	<input type="text"/>	Confirm Password*	<input type="text"/>

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. This address is used to send e-mail notifications.
- 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 **Login Information** 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.

Employment Information* | Permission Types* | Categories | Time Off Types | E-mail Notifications

Set Employment Information


Employee Type * [dropdown] Supervisor * [dropdown]

Hours Per Day * [input: 8] Date Hired [calendar icon: 03/15/2006]

Holiday Calendar [dropdown: Holidays for Germany] Weekly Days Off

Sunday Monday Tuesday
 Wednesday Thursday Friday
 Saturday

6. Under **Set Employment 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. The holiday calendar sets the days off for a company that will not count against the employee's accrued time off.
- Select the **Holiday Calendar** from the drop-down list.
- Select the standard days off in the week for the employee by checking the appropriate boxes in the **Weekly Days Off** field. When calculating the number of days taken and remaining for a time off request, any of the employee's weekly days off are excluded from the calculation.

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.

Employment Information* | Permission Types* | Categories | Time Off Types | E-mail Notifications

Set Permission Types

Administrator
 Manager
 Supervisor
 Time Off User

Save Save & Add More Cancel

- 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.

Employment Information* | Permission Types* | **Categories** | Time Off Types | E-mail Notifications

Set Categories and Groups

+ Department

+ Location

Save | Save & Add More | Cancel

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.

- Select the **Time Off Types** tab, where all of the available types of time off are listed. By default, each time off type contains a single record that contains the default accrual and reset values specified for the time off type at the system level.



Employment Information* | Permission Types* | Categories | **Time Off Types** | E-mail Notifications

Set Time Off Type Details


<input checked="" type="checkbox"/> Bereavement	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Family Emergency	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Holiday	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Jury Duty	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Medical Leave	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Personal Leave	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Sick	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --
<input checked="" type="checkbox"/> Vacation	Effective Date	--	Initial Balance	--
	Accrual	-- No Accrual --	Reset	-- No Reset --

Save | Save & Add More | Cancel

If you wish, you can leave the time off settings at their default values. However, until an effective date and initial balance are specified in the record, only the amount of time off taken for the type will be recorded when a time off request is made. No calculations for time off remaining will be provided.

To specify the initial balance and effective date, or to edit the accrual and reset methods for a particular time off type, select the  icon next to the type and then select the  icon in the **Employee Time Off Type Details** pop-up window. The fields available for each time off type are defined in the table that follows.

Note: When editing the time off settings, keep in mind the order the various settings take effect if scheduled for the same day, as described in [The Order Settings Take Effect](#) on page 49.

Field	Description
Effective Date	Select the Effective Date using the  icon. The Effective Date indicates the date from which the Initial Balance takes effect. To enable the accrual and reset methods, the Effective Date must be a valid date.
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 that 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	<p>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:</p> <ul style="list-style-type: none"> • No Accruals: If you select No Accruals, then there will be no accrual for the time off type. 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	<p>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 and when, depending on the option you choose from the drop-down list:</p> <ul style="list-style-type: none"> • 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 occur. 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 occur. 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)	<ul style="list-style-type: none"> Monthly: If you select Monthly, then you must select the date when the reset should occur. 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 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. Yearly: If you select Yearly, then you must select the month and date when the reset should occur. 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 a year, 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 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.

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

Employment Information* | Permission Types* | Categories | Time Off Types | E-mail Notifications

Set E-mail Notifications

Time Off Request Approved

Time Off Request Rejected

Time Off Request Waiting for Approval

Time Off Request Withdrawn

Save | Save & Add More | Cancel

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.

Editing Time Off Settings for an Employee

Time off settings, including initial balances, when and how time is accrued, and when balances are reset, can be customized for each time off type for each employee. After the settings are initially defined, they can be edited later as an employee's benefits or company policies change.

About Time Off Records

Each time off type listed for an employee contains one or more records, which specify an initial balance and how time off is accrued or reset. Each record also contains an effective date, which dictates when the balances, accruals, and resets within the record take effect. For example, consider a time off type with the following records for Mark Robbins.

List Vacation details for Mark Robbins					
Menu	Effective Date	Initial Balance	Accrual Details	Reset Details	Reset Type
 	08/11/2005	0 day(s)	Monthly On 1st, 1 day(s)	Yearly On January 1st, 0 day(s)	Specific
 	06/01/2006	Carry over	Monthly On 1st, 1.25 day(s)	Yearly On January 1st, 0 day(s)	Specific

For the period from August 11, 2005 until May 31, 2006, Mark will earn 1 vacation day per month and the balance will be reset to 0 on January 1, 2006. Mark received a promotion that will be effective June 1, 2006, so a second record has been added to increase his vacation accruals to 1.25 days per month. If Mark submits a time off request for a period that occurs between August 11, 2005 and May 31, 2006, the time off calculations will be based on the accrual settings in the first record. Any time off requests submitted for periods on or after June 1, 2006, will take into account the accrual settings in the second record and the balance that was carried over from the first period.

The Order Settings Take Effect

If an accrual and reset are set to occur on the same day, the accrual will take place first and then the reset will follow. If an accrual and reset are specified to occur on the **Effective Date**, the **Initial Balance** overrides any accruals or resets set to take place that day. For example, consider the following time off settings:

- An accrual of 1 day is set to occur `Semimonthly` on the 1st and 16th
- A reset to 2 days is set to occur `Monthly` on the 1st of the month
- The **Effective Date** for the record is April 1, 2006
- The **Initial Balance** is 5 days

In this case, on April 1, 2006, the balance will be set to 5 days, with the **Initial Balance** overriding the accruals and resets. On April 30, 2006, the time off balance will be set to 6, based on the **Initial Balance** and an accrual of 1 day on April 16, 2006. On May 1, 2006, the balance will change to 2 days, as an accrual of 1 day is followed by a reset to 2 days.

Time Off Settings for New Employees

When an employee is added, a single record is automatically created for each type. This record contains the default accrual and reset values specified for the time off type at the system level. However, until an effective date and initial balance are specified in the record, only the amount of time off taken for the type will be recorded when a time off request is made. No calculations for time off remaining will be provided. To specify the effective date and initial balance for an employee, see [Editing an Existing Record](#) on page 50.

Note: When importing employees, the full details of the time off settings can be specified, including the effective date and initial balance. As a result, the time off type will take effect at the date specified and remaining time will be calculated.

Editing Time Off Settings

There are two methods you can use to edit the time off settings for an employee:

- **Edit the existing record for the time off type for the employee**





This method is best used to enter an initial balance and effective date, change the accrual and reset methods from their default values, or correct an error in the settings.

- **Add a new record for the time off type that becomes effective on a specific date**

This method is ideal when the status of an employee changes, such as promotion that increases the number of vacation days granted to an employee each year or a change in corporate policy regarding sick days. By adding a new record, existing balances and time off calculations for requests prior to the new effective date will still reflect the original time off settings for the employee. When adding a new record, you can choose to carry over the balance resulting from the previous record or start over with a new balance.

Editing an Existing Record

To edit the existing time off record for an employee:




1. Select **Employees** from the **Administration** menu. The **List Employees** page is displayed.
2. Select the  icon next to the employee you wish to edit.
3. Select the **Time Off Types** tab.
4. Select the  icon next to the time off type.
5. Select the  icon for the time off record to be edited.
6. Enter an **Initial Balance**.
7. Select an **Effective Date** using the  icon.

8. Edit the **Accruals** and **Reset** values as necessary.
9. Select the **Save** button to save the changes. To exit without saving the changes, select the **Cancel** button.
10. Select **Close Window** to return to the **Edit Employee** page.

Note: Any changes made to a time off record will effect calculations for existing time off requests for the employee.

Adding a New Record




To add a new time off record for an employee:

1. Select **Employees** from the **Administration** menu. The **List Employees** page is displayed.
2. Select the  icon next to the employee you wish to edit.
3. Select the **Time Off Types** tab.
4. Select the  icon next to the time off type.
5. Select the **Add** button.
6. Select the date the new settings will come into effect by entering the date in the **Effective Date** field or using the  icon.
7. Enter an **Initial Balance** for the new record. If an initial balance was specified for the previous record, you can choose to either carry over the balance that exists at the end of time period covered by the previous record or specify a new starting balance.
8. Select the method and dates for accrual. For more information on the accrual methods available, refer to the topic titled *Adding a Time Off Type* on page 72.
9. Select the method and dates for reset. For more information on the reset methods available, see *Adding a Time Off Type* on page 72.
10. Select **Save** to save the new record. To close the window without saving the new record, select **Cancel**.
11. Select **Close Window** to return to the **Edit Employee** page.
12. Select **Save**.

Note: Time off calculations for a request that occurs on or after the effective date of the new record will reflect the settings specified in the new record. Calculations for a request that occurs prior to the effective date of the new record will use the settings specified in the previous record.

Deleting a Time Off Record

You can also delete a record for a time off type. By deleting the record, the time off settings revert to those dictated by the previous record or a default record, if no previous record exists. To delete a time off record for an employee.

1. Select **Employees** from the **Administration** menu. The **List Employees** page is displayed.
2. Select the  icon for the employee you wish to delete the time off record for.
3. Select the **Time Off Types** tab.
4. Select the  icon next to the time off type.
5. Select the  icon for the time off record to be deleted.
6. Select the **Save** button to save the changes.
7. Select **Close Window** to return to the **Edit Employee** page.
8. Select **Save**.

name of the import file and a date and time stamp and has the extension .log. Additionally, any entries which were not successfully imported are copied to a new CSV file with a date and time stamp and the text "Invalid" appended to the file name. This new CSV file is also stored in the `DataImport` folder.

Note: If an employee already exists in Web TimeOff and is then specified in a file being imported, the import process overwrites the settings for that employee with those contained in the import file. For example, consider when an employee has two time off types enabled in Web TimeOff and a file is imported with only the first time off type included for that employee. After the import, the second time off type will no longer be enabled for the employee. However, if an existing time off type is included in the import file but with a different effective date, instead of overwriting the existing details, a new record will be added to the time off type for the employee.

Note: 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 licensed seats for Web TimeOff and 100 employees to be imported, all 100 would be imported into the program, but only 50 employees could be enabled at any one time.

Note: 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.

Employee Import File Format

Employees can be imported into Web TimeOff using a Comma Separated Value (CSV) file. When importing employees, the entries in the CSV file must match the order and format specified in the table that follows. The first line of the file must contain the **Field Names** shown and each additional line is used to specify the field values for a particular employee. All **Field Names** and field values must be separated by a comma. Note that the **Column** values shown in the table are for reference only and are not included in the CSV file. Unless otherwise noted, a value must be specified for each field.

A sample employee import file can be opened from the **Import Employees** page.

Column	Field Name	Type	Description
1	SINo	Whole number	This field is used to indicate the number of the entry in the import file. The first entry, which follows the row containing the Field Names , should be marked 1, the second entry should be marked 2, and so on.
2	FirstName	String up to 50 characters	The First Name of the employee.

Column	Field Name	Type	Description
3	LastName	String up to 50 characters	The Last Name of the employee.
4	UserName	String up to 15 characters	The User Name for the employee, which they will use to log in to Web TimeOff.
5	Password	String between 5 and 12 characters in length	The Password the employee will use to log in to Web TimeOff.
6	E-mail	String up to 50 characters	The e-mail address for the employee to use for e-mail notifications. Note that e-mail notifications will have to be enabled for the employee manually after the import is complete. If e-mail notifications are not required, this field can be left blank.
7	Supervisor	String	The employee to be selected as the Supervisor for this employee, specified with their User Name . The employee specified must exist in Web TimeOff and must have a permission type with Time Off Visibility/Approval/Entry at the Supervisor level enabled.
8	EmployeeType	String	The employee type to assign to the employee. The value specified must match the Name of an existing employee type.
9	DateHired	Date	The date the employee was hired. Time off requests can only be entered for the employee for periods on or after this date.
10	PermissionType	String	The permission type to assign to the employee. The value specified must match the Name of an existing permission type. To specify multiple permission types, use a forward slash (/) between each type.
11	HoursPerDay	Number	The number of hours per day the employee works. This value is used in time off calculations.
12	EmployeeId	String up to 15 characters	This field can be used to specify a number or code used by your organization for each employee. A value is not required.
13	Enabled	Yes or No	This field indicates whether or not the employee should be activated in the application. If set to No , the employee will not be able to log in to Web TimeOff.

Column	Field Name	Type	Description
14	HolidayCalendar	String	The Holiday Calendar to use for the employee. The value specified must match the Name of an existing holiday calendar.
15	DaysOff	String	The Weekly Days Off for the employee, which will be excluded from any time off calculations. To specify multiple days off, use a forward slash (/) between each day. For example, to specify Friday, Saturday, and Sunday as weekly days off, enter <i>Friday/Saturday/Sunday</i> . If no value is specified, no weekly days off will be set for the employee.
16	TimeOffType1	String	The first time off type to be enabled for the employee. The value specified must match the Name of an existing time off type. If you do not want to enable any time off types for the employee, which will prevent them from requesting time off, leave columns 16 through 26 blank.
17	AsOfDate1	Date	The date the initial balance and accrual and reset methods will take effect for the first time off type. If you do not wish to specify an initial balance, this field can be left blank.
18	InitialBalance1	Number	The initial amount of time to provide for the time off type. If the Track Time Off In field in the System Preferences is set to Hours , enter the number of hours. If the field is set to Days , enter the number of days. If you do not wish to specify an initial balance, leave this field and the AsOfDate1 and InitialBalanceType1 fields blank. If InitialBalanceType1 is set to <i>CarryOver</i> , you must still enter a value in this field, however the value will have no effect.
19	InitialBalanceType1	SetTo or CarryOver	This field specifies whether the initial balance will be set to the value given in InitialBalance1 or if the balance from a previous record will be carried over. <i>CarryOver</i> can only be specified if a record already exists for the time off type for the employee, as that record is needed to provide the balance that is to be carried over. If you do not wish to specify an initial balance, leave this field and the AsOfDate1 and InitialBalance1 fields blank.

Column	Field Name	Type	Description
20	DefaultAccrue1	Weekly, Semimonthly, Monthly or Yearly	The interval at which time should be added to (accrued on) the balance. See Specifying Accruals and Resets on page 59 for more information. To not have any time added on a regular basis, leave this field, AccrueOn1 , and AccrueValue1 empty.
21	AccrueOn1	See Specifying Accruals and Resets on page 59.	The date on which the time should be added. This value must be valid for the interval specified in DefaultAccrue1 , as detailed in Specifying Accruals and Resets on page 59.
22	AccrueValue1	Number	The amount of time to add to the balance on each accrual date. If the Track Time Off In field in the System Preferences is set to Hours , enter the number of hours to add. If the field is set to Days , enter the number of days.
23	DefaultReset1	Weekly, Semimonthly, Monthly or Yearly	The interval at which the balance for the time off type should be reset. See Specifying Accruals and Resets on page 59 for more information. To not have the balance regularly reset, leave this field, ResetOn1 , ResetValueType1 , and ResetValue1 empty.
24	ResetOn1	See Specifying Accruals and Resets on page 59.	The date on which the balance should be reset. This value must be valid for the interval specified in DefaultReset1 , as detailed in Specifying Accruals and Resets on page 59.
25	ResetValueType1	Specific or Maximum	This field specifies whether or not the balance should always be reset to the number provided in ResetValue1 or only if the current balance exceeds the ResetValue1 number. For example, consider an employee with an initial balance of 10 days set to reset to 15 days yearly on January 30 with no time taken off. If ResetValueType1 is set to Specific , on January 30 the balance will reset to 15 days. If ResetValueType1 is set to Maximum , the balance will remain at 10 days.
26	ResetValue1	Number	The amount of time to reset the balance to on each reset date. If the Track Time Off In field in the System Preferences is set to Hours , enter the number of hours to add. If the field is set to Days , enter the number of days.

Column	Field Name	Type	Description
...			Repeat columns 16 through 26 for each additional time off type to be assigned to the employee, replacing "1" in the Field Name with the number of the time off type. For example, to specify a second time off type, use the Field Names TimeOffType2, AsOfDate2, and so on. Note that not all of the time off types have to be filled out for each employee. For example, you can have columns for TimeOffType1, TimeOffType2, and TimeOffType3. However, if you only want to assign two time off types for a certain employee, leave the columns for TimeOffType3 empty in that row.
27*	Category1	String	The first category containing groups to be assigned to the employee. The value specified must match the Name of an existing category.
28*	Groups1	String	The group within the category specified in Category1 to assign to the employee. The value specified must match the Name of an existing group within the category specified in Category1 . To specify multiple groups within the category, use a forward slash (/) between each group.
...			Repeat columns 27 and 28 for each additional category/group to be assigned to the employee, replacing "1" in the Field Name with the number of the entry. For example, to specify groups within a second category, use the Field Names Category2 and Groups2. Note that not all of the category and group fields have to be filled out for each employee. For example, you can have columns for Category1/Group1, Category2/Group2, and Category3/Group3. However, if you only want to assign two groups to a certain employee, leave the columns for Category3 and Group3 empty in that row.

* Or higher if multiple time off types specified. For example, if two time off types are specified, Category1 will be entered in column 38.

Limitations on Data Types

Fields of type "Date" must follow the format mm/dd/yyyy, where mm is the two digits for the month, dd is the two digits for the day, and yyyy is the year. For example, February 12, 2006 should be specified as 02/12/2006.

Specifying Accruals and Resets

If you wish to have time added to the time off balance for an employee on a regular basis, you can specify an accrual method for the time off type. The available accrual methods are described in the table below, along with the values required for the **AccrueOn** field for each method. To not have any time added on a regular basis for the time off type, leave the **DefaultAccrue**, **AccrueOn**, and **AccrueValue** fields empty.

DefaultAccrue Value	Description	Valid AccrueOn Values
Empty	No additional time off will be earned on a regular basis for this time off type.	None. Leave the AccrueOn field empty.
Weekly	On a specific day each week, the amount of time specified will be added to the current time off balance for the employee.	One of the following: <ul style="list-style-type: none">• Sunday• Monday• Tuesday• Wednesday• Thursday• Friday• Saturday
Semimonthly	Twice monthly, the amount of time specified will be added to the current time off balance for the employee.	One of the following, representing the days of the month the accrual will take place on: <ul style="list-style-type: none">• 1&16• 2&17• 3&18• 4&19• 5&20• 6&21• 7&22• 8&23• 9&24• 10&25• 11&26• 12&27• 13&28

DefaultAccrue Value	Description	Valid AccrueOn Values
Monthly	On a specific day each month, the amount of time specified will be added to the current time off balance for the employee.	A number from 1 to 31 representing the day of the month the accrual will take place on.
Yearly	On a specific day of each year, the amount of time specified will be added to the current time off balance for the employee.	<p>The month and day of the year the accrual should take place in one of the following formats:</p> <ul style="list-style-type: none"> • dd-mmm • mmm dd • dd-month • month dd <p>For example, January 10th can be specified as 10-Jan, Jan 10, January 10, or 10-January. Note that the value must be a valid date.</p>

Along with accruals, you can specify to reset the balance at a regular interval. The available reset methods are described in the table that follows, along with the values required for the **ResetOn** field for each method. To not have the balance reset on a regular basis for the time off type, leave the **DefaultReset**, **ResetOn**, **ResetValueType**, and **ResetValue** fields empty.

DefaultReset Value	Description	Valid ResetOn Values
Empty	The balance will not be reset on a regular basis.	None. Leave the ResetOn field empty.
Weekly	On a specific day each week, the time off balance for the employee will be reset either to a specific value or a maximum value.	<p>One of the following:</p> <ul style="list-style-type: none"> • Sunday • Monday • Tuesday • Wednesday • Thursday • Friday • Saturday

DefaultReset Value	Description	Valid ResetOn Values
Semimonthly	Twice monthly, the time off balance for the employee will be reset either to a specific value or a maximum value.	<p data-bbox="763 234 1278 303">One of the following, representing the days of the month the reset will take place on:</p> <ul data-bbox="813 329 928 746" style="list-style-type: none"> • 1&16 • 2&17 • 3&18 • 4&19 • 5&20 • 6&21 • 7&22 • 8&23 • 9&24 • 10&25 • 11&26 • 12&27 • 13&28
Monthly	On a specific day each month, the time off balance for the employee will be reset either to a specific value or a maximum value.	A number from 1 to 31 representing the day of the month the reset will take place on.
Yearly	On a specific day of each year, the time off balance for the employee will be reset either to a specific value or a maximum value.	<p data-bbox="763 911 1278 980">The month and day of the year the reset should take place in one of the following formats:</p> <ul data-bbox="813 1006 978 1137" style="list-style-type: none"> • dd-<i>mmm</i> • <i>mmm</i> dd • dd-month • month dd <p data-bbox="763 1145 1278 1275">For example, January 10th can be specified as 10-Jan, Jan 10, January 10, or 10-January. Note that the value must be a valid date.</p>

Working with Employee Types

Employee types help you classify employees, based on characteristics such as their work schedule and job expectations. Web TimeOff provides default employee types, or you can edit, delete, or add employee types to customize the application.

To view the current employee types available:

- Select **Employee Types** from the **Administration** menu. The **List Employee Types** page is displayed.

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

Add

To edit an employee type:

1. From within the **List Employee Types** page, select the icon next to the **Employee Type** you want to edit. You can also edit an **Employee Type** by clicking on the name of the employee type.
2. Make changes to the **Name** and **Description** fields as necessary.
3. Clear the **Enabled** check box if you do not want to activate the **Employee Type** in the application.
4. Select **Save** to save your changes. To exit without saving, select **Cancel**.

To delete an employee type:

- From within the **List Employee Types** page, select the icon next to the **Employee Type** you want to delete. A confirmation message will be displayed. Deleting an employee type is a permanent action. An employee type cannot be deleted if it is currently being used in the application.

To add an employee type:

- Follow the steps given in [Adding an Employee Type](#) on page 63.

Adding an Employee Type

To add an employee type:

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

Add Employee Type Logged in as admin

** Indicates required fields*

Define Employee Type Details

Name *

Description

Enabled

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

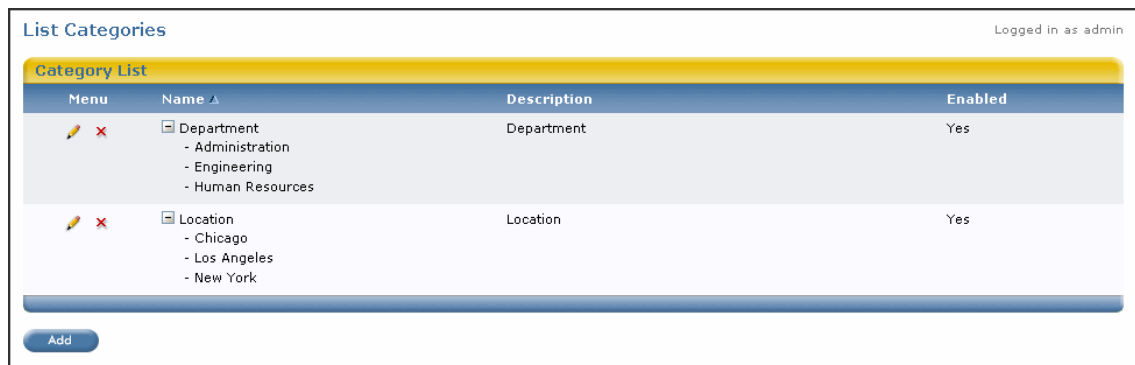
Working with Categories

Categories allow you to organize employees into meaningful collectives, such as departments or locations. You can define any categories you wish and, within each category, a number of groups can be created. Each employee can then be associated with one or more groups in the category, as well as to one or more groups within any other categories you create. Categories and groups can help you filter the employee list for different actions, such as generating reports.


For example, a category called "Department" could be created, with groups for Administration, Engineering, and Human Resources. A category called "Location" could also be created with groups for Los Angeles, Chicago, and New York. An employee working in Human Resources in Chicago would then be selected as part of the Human Resource group within the Department category and the Chicago group within the Location category.

To view a list of categories:

- Select **Categories** from the **Administration** menu. The **List Categories** page is displayed.



To edit the name or description of a category:

1. From within the **List Categories** page, select the  icon next to the category you want to edit.
2. Make changes to the **Name** and **Description** fields as required.
3. Clear the **Enabled** check box if you do not want to activate the category in the application.
4. Select **Save** to save your changes. To exit without saving, select **Cancel**. You will be returned to the **List Categories** page.

To edit the groups within a category:

1. From within the **List Categories** page, select the name of the category you wish to edit.
2. Edit the groups within the category as follows:
 - To add a group, select the **Add** button and enter the necessary information.
 - To edit a group, select the group from the **Groups** list and select the **Edit** button. Edit the group as necessary and select the **Save** button.
 - To delete a group, select the group from the **Groups** list and select the **Delete** button. A confirmation message will be displayed. Deleting a group is a permanent action.
3. Select **OK** to return to the **List Categories** page.

To delete a category:

- From within the **List Categories** page, select the **✕** icon next to the category you want to delete. A confirmation message will be displayed. Deleting a category is a permanent action.

To add a category:

- Follow the directions given in [Adding a Category](#) on page 66.

Adding a Category

To add a category:

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

Add Category Logged in as admin

** Indicates required fields*

Define Category Details

Name*

Description

Enabled

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.

Edit Category Logged in as admin

Educational Qualifications ✓ Enabled

Groups

Groups

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

Add Group Logged in as admin

Department Enabled
Department

* Indicates required fields

Define Group Details

Name*

Description

Enabled

Share time off request information in this Group

Share time off request information across Groups

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

Manage Group Members

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

Available Employees

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

Selected Employees

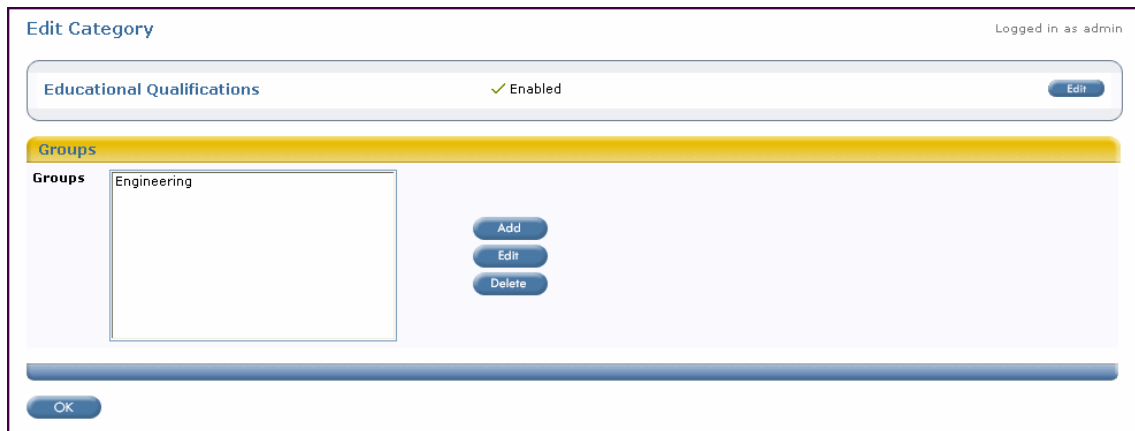
8. Under **Define Group Details**, enter the following:

- 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 time off request 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 time off request 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** page 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** page.

Working with Historical Time Off Requests

The **Historical Time Off Requests** page provides a complete list of time off requests along with the ability to quickly submit, approve, reject, delete, or withdraw a group of requests together. You can also print the details of a time off request accessed from this page.

To view a list of historical time off requests:

1. Select Historical Time Off Requests from the **Administration** menu. The **Historical Time Off Requests** page is displayed.

Menu	Employee	Time Off Type	Start Date	End Date	Request Status	Reporting To	Last Action Date
	<input type="checkbox"/> Green, Sally	Vacation	03/07/2006	03/08/2006	Approved	Brown, Doug	03/06/2006 12:00:00 AM
	<input type="checkbox"/> Hill, Tom	Vacation	02/28/2006	03/02/2006	Rejected	Jones, Rob	02/27/2006 12:00:00 AM
	<input type="checkbox"/> Jones, Rob	Vacation	03/02/2006	03/06/2006	Approved	Brown, Doug	03/01/2006 12:00:00 AM
	<input type="checkbox"/> Young, Frank	Vacation	02/28/2006	03/02/2006	Rejected	Brown, Doug	02/27/2006 12:00:00 AM

Note: For information on filtering the employees refer to [Filtering Employees using Selection Criteria](#) on page 28.


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 page is displayed confirming the action. Click **Yes** to confirm the action or click **No** to return to the **Historical Time Off** page.

Working with Time Off Types

Time off types define the different types of periods when an employee will not be available for work, such as vacations, statutory holidays, training, and similar out of office activities. When an employee requests time off, they must select a time off type for the request. You can edit, delete, and add time off types. Once a time off type is defined, details of how time will be accrued or reset can be set for each employee.

To view the list of time off types:

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

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

To edit a time off type:

- Select the icon next to the time off type you want to edit or click the name of the time of type.

To delete a time off type

- Select 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.

To add a time off type:

- Follow the instructions in [Adding a Time Off Type](#) on page 72.

Adding a Time Off Type

To add a time off type:

1. Select **Time Off Types** from the **Administration** menu.
2. On the **List Time Off Types** page, click **Add**. The **Add Time Off Type** page is displayed.

Add Time Off Type

Logged in as admin

* Indicates required fields

Define Time Off Type Details

Name *

Description

Default Accrue -- No Accruals --

Default Reset -- No Reset --

Enabled

3. Enter the following:

- A unique **Name** for the time off type (mandatory field).
 - A **Description** for the time off type.
4. Select the accrual method to be used as the default for new employees from the **Default Accrue** drop-down list. The accruals indicate the interval at which additional time will be earned. If you select an accrual method other than **No Accruals**, additional information on when the accrual should take place and the amount of time to be added must be specified.

Accrual Type	Description
No Accruals	No time will be added to the employee's time off balance at a regular interval.
Weekly	Time will be added to the employee's balance once each week. 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.

Reset Type	Description
Weekly	<p>The balance will be reset once each week. 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.</p>
Semimonthly	<p>The balance will be reset twice a month. 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.</p>

Reset Type	Description
Monthly	<p>The balance will be reset once each month. 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 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.</p>
Yearly	<p>The balance will be reset once each year. 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 a year, 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 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.</p>

6. Clear the **Enabled** check box, if you do not want to activate the time off type in the application.
7. Click **Save**, to save the time off type. If you want to exit without saving the defined time off type, click **Cancel**.

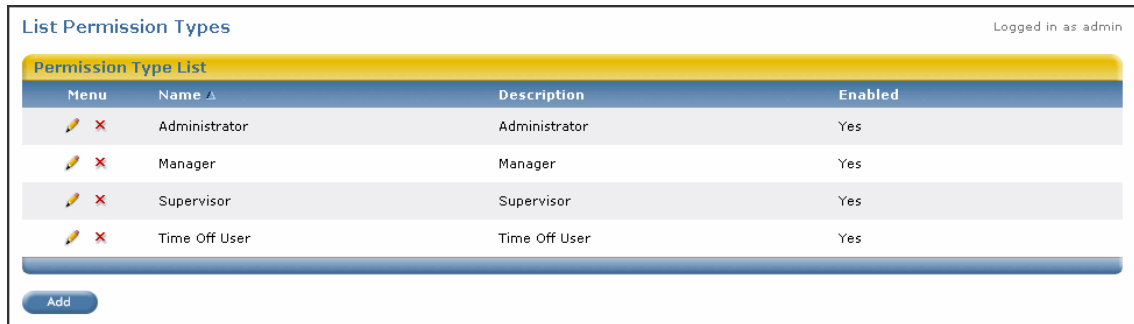
Note: The settings specified for a time off type become the default settings for that time off type when it is applied to new employees (existing employees retain the settings already set up in their profiles).

Working with Permission Types









Permission types are named sets of roles used to assign different levels of access to employees, based on their position within the company and their requirements within Web TimeOff. Web TimeOff provides predefined permission types, which can be edited, or new permission types can be created. You are not able to delete a permission type that is currently assigned to any employee.

To view a list of available permission types:

- Select **Permission Types** from the Administration menu. The **List Permission Types** page is displayed.




The screenshot shows the 'List Permission Types' page. At the top right, it says 'Logged in as admin'. Below the title, there is a yellow header bar with the text 'Permission Type List'. Underneath is a table with the following data:


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

At the bottom left of the table area, there is a blue button labeled 'Add'.

To edit a permission type:

- Select the  icon next to the permission type you want to edit or click on the name of the permission type.

To delete a permission type:

- Select 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.

To add a permission type:

- Follow the instructions in the section [Adding a Permission Type](#) on page 77.

Adding a Permission Type

To add a permission type:

1. Select **Permission Types** from the **Administration** menu.
2. On the **List Permission Types** page, click **Add**. The **Add Permission Type** page is displayed.

Add Permission Type Logged in as admin

** Indicates required fields*

Define Permission Details

Name *

Description

Enabled

Permission Types | Group Access

Define Actions

Login to the System

Calendar

Administration

Time Off

Organizational Responsibility

Reports

Config

3. Enter a unique **Name** (mandatory field) and a **Description** in the respective fields.
4. Clear the **Enabled** check box, if you do not want to activate the permission type in 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.

Department	View	Edit	Delete
Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engineering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Working with Holiday Calendars

Holiday calendars allow you to designate a set of holidays for your organization. The holiday calendar can also be customized according to the standard holidays in a company. You can edit, delete, and add holiday calendars. You can assign a specific holiday calendar to each employee. You can assign a default holiday calendar in the **System Preferences**.

To view a list of holiday calendars:

- Select **Holiday Calendars** from the **Administration** menu. The **List Holiday Calendars** page is displayed.

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

Add

To edit a holiday calendar:

- Select the icon next to the holiday calendar type you want to edit or click on the name of the holiday calendar.

To delete a holiday calendar:

- Select 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.

To add a holiday calendar:

- Follow the instructions in [Adding a Holiday Calendar](#) on page 80.

Adding a Holiday Calendar

To add a holiday calendar:

1. Select **Administration** from the main menu and click **Holiday calendars**.
2. On the **List Holiday Calendar** page, click **Add**. The **Add Holiday Calendar** page is displayed.

Add Holiday Calendar Logged in as admin

** Indicates required fields*

Define Holiday Calendar Details

Name *

Holiday

Enabled

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** page is displayed.

Add Holiday Logged in as admin

** Indicates required fields*

Define Holiday for 'Holidays for South Africa'

Holiday Date *

Icon

Description *

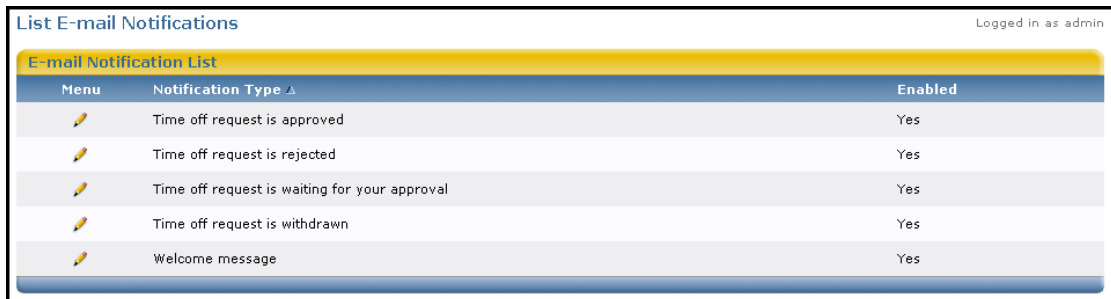
6. Under **Define Holiday**, enter the following:
 - Select the **Holiday Date** using icon (mandatory field).
 - Select an icon from the **Icon** drop-down list. If you would like to add your own icon for a particular holiday, create a .gif or .jpg file that is 15 pixels by 15 pixels and place it in the ApplicationRoot\Images\holidays folder where Web TimeOff was installed (typically C:\Program Files\Replicon Inc\Web TimeOff). When the **Add Holiday** page is reloaded, the file will be available for selection in the **Icon** drop-down list.






Working with E-mail Notifications

Web TimeOff can automatically send e-mail notifications to employees, depending on their settings. Web TimeOff provides predefined e-mail notifications that you can modify to meet your needs. They are predefined in the application, and you can only edit or disable the templates; notifications cannot be added or deleted.

To view the available e-mail notifications:

- Select **E-mail Notifications** from the **Administration** menu. The **List E-mail Notifications** page is displayed.




Menu	Notification Type	Enabled
	Time off request is approved	Yes
	Time off request is rejected	Yes
	Time off request is waiting for your approval	Yes
	Time off request is withdrawn	Yes
	Welcome message	Yes

To edit an e-mail notification:

- Follow the steps provided in [Editing an E-mail Notification](#) on page 83.


To disable an e-mail notification:

1. From the **List E-mail Notifications** page, select the  icon next to the notification you want to disable, or click on the name of the e-mail notification itself. The **Edit E-mail Notification** page is displayed.
2. Clear the **Enabled** check box.
3. Select **Save** to save the changes and return to the **List E-mail Notifications** page.

Note: If enabled, the **Welcome** e-mail notification is sent automatically when an employee is added to the system. However, a utility has been provided with Web TimeOff to allow you to choose when and to who the message is sent. For more information, see [Using the Administrative Utilities](#) on page 111.

Editing an E-mail Notification

To edit a template:

1. From within the **List E-mail Notifications** page, select 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** page is displayed.

Edit E-mail Notification Logged in as admin

** Indicates required fields*

Define E-mail Notification

Notification Type	Time off request is approved
Description	This e-mail will be sent to the employee whenever his/her time off request is approved.
Enabled	<input checked="" type="checkbox"/>
Reply To	<input type="text" value="wto@yourcompany.com"/>
Subject*	<input type="text" value="Your time off request has been ap"/>
Body	<div style="border: 1px solid #ccc; padding: 5px;"><p>\$FIRSTNAME \$LASTNAME's time off request has been approved by \$APPROVER. Time off request information Time Off Type : \$TIMEOFFTYPE</p></div>

Available Tags

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

2. 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.
3. 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.

Modifying the 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 **System Preferences** from the **Administration** menu. The **System Preferences** page is displayed, with two tabs – **General** and **E-mail Settings**.

System Preferences Logged in as admin

* Indicates required fields

General* | E-mail Settings*

General Settings

Date Format	<input type="text" value="03/17/2006"/>
Holiday Calendar	<input type="text" value="Holidays for United States"/>
Track Time Off In	<input type="text" value="Days"/>
Minimum Time Off Request Resolution	<input type="text" value="Hours"/>
Records Per Page*	<input type="text" value="10"/>
Number Of Direct Reporting Employees In The Drop-down List*	<input type="text" value="50"/>
Default Hours Per Day*	<input type="text" value="8"/>
Weekly Days Off	<input checked="" type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday

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** to be used as the default for new employees from the drop-down list.
- 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, $\frac{3}{4}$, $\frac{1}{2}$ or $\frac{1}{4}$ 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 list page in the **Records per Page** field. This is a mandatory field that cannot be left blank.
- Enter a value in the **Number of Direct reporting Employees in the Drop-down List** field. This field dictates the number of direct-reporting employees shown in the **Employee** drop-down list when adding or editing a time off request. 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.
- Select the standard days that are taken off during the week by checking the appropriate boxes in the **Weekly Days Off** section. This value is used as the default when adding a new employee, however weekly days off can be specified individually for each employee.

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

System Preferences

Logged in as admin

* Indicates required fields

General*	E-mail Settings*		
E-mail Settings			
Outgoing Mail Server (SMTP)	<input type="text" value="localhost"/>	Port	<input type="text" value="25"/>
Web TimeOff E-mail Address*	<input type="text" value="noreply@yourcompany.com"/>		

- Enter the name of the **Outgoing Mail Server**, and enter the **Port** number.
- Enter the **Web TimeOff E-mail Address**. This value is the default address e-mail notifications are sent from when an address is not specified in **Reply To** field in the **Edit E-mail Notification** page. This is a mandatory field that cannot be left blank.

Note: The **Date Format** and **Records per Page** fields can be changed at the employee level in the **My Preferences** section. If the **System Preferences** are changed, the **Date Format** and the **Records per Page** fields for the existing employees will remain the same. The change in the **Date Format** and the **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 **Licensing** from the **Administration** menu.
2. In the **License File** field, enter or browse to the path where the license key is located.
3. Click **Save**.

License Key Management

Logged in as admin

The screenshot displays the 'License Key Management' interface. It features three main sections:

- Extend License Key:** Contains two input fields labeled 'E-mail Address' and 'Activation Key', and a 'Save' button.
- Replace Current License File:** Contains a 'License File' input field with a 'Browse...' button and a 'Save' button.
- Current License Details:** A table-like view showing license information:


Expires On	01/01/2006
Maintenance Agreement Expires On	01/01/2006
Licensed Seats	10
Used Licenses	7
End User License Agreement	<pre>SOFTWARE LICENSE AGREEMENT This computer program is protected by copyright and other intellectual property laws and international treaties. Unauthorized reproduction, transmission, de- compiling, translation, reverse engineering, creation of derivative works, copying GUI and/or copyrightable concepts, or distribution of this computer</pre>

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

Editing a 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 Requests** page.

To edit a time off request:

1. Select **List Time Off Requests** from the **Time Off** menu.
2. If you wish, filter the requests shown using the **Selection Criteria** area.
3. 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.

Edit Time Off Request

Logged in as admin

2 of 15 |  |  | Mark All As Read

Time Off Request Details

Read

Employee Green, Sally

Time Off Type

Start Date

End Date

Employee Comments

Time Off Status

Vacation

- Day(s) requested: 4
- Taken prior to requested period: 0
- Remaining after requested period: -2

Approval History

Employee	Action	Action Date	Approver Comments
Green, Sally	Submitted	03/11/2006 12:00:00 AM	


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.

4. Edit the time off request details as necessary.
5. If you want to save the time off request, click **Save**.
6. If you want to submit the time off request, click **Submit**.
7. If you want to delete the time off request, click **Delete**.
8. Click **Close Window** to return to the **List Time Off Requests** page.

Submitting 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 **List Time Off Requests** from the **Time Off** menu.
2. If you wish, filter the requests shown using the **Selection Criteria** area.
3. 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.

Edit Time Off Request

Logged in as admin

2 of 15 | Mark All As Read

Time Off Request Details Read

Employee	Green, Sally		
Time Off Type	Vacation		
Start Date	03/13/2006	Full Day Off	
End Date	03/16/2006	Full Day Off	
Employee Comments	Family outing		

Time Off Status

Vacation

- Day(s) requested: 4
- Taken prior to requested period: 0
- Remaining after requested period: -2

Approval History

Employee	Action	Action Date	Approver Comments
Green, Sally	Submitted	03/11/2006 12:00:00 AM	

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.

4. Edit any time off request details that you would like to change.
5. If you want to submit the time off request for approval, click **Submit**. Alternately, click **Cancel** to return to the **List Time Off Requests** page.

Viewing your Time Off Status

Web TimeOff makes it easy for you to check the amount of time taken and the amount of time remaining for all of the time off types available to you.

To view your time off status as of today:

- Select **My Time Off Status** from the **Time Off** menu.

The **My Time Off Status** page displays the following information.

- **Time Off Type** indicates the time off type the data is for. Time off types not assigned to you will not be shown.
- **Days/Hours Taken** displays the amount of time off taken for the type.
- **Days/Hours Remaining** displays the amount of time still available to be taken for the type. This value is based on the time already taken and any initial balances, carry over of existing balances, accruals, and resets specified for the type.

My Time Off Status Logged in as admin


My Time Off Status As Of 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

To view your status as of another date:

- Within the **My Time Off Status** page, enter the date in the **Select Date** field or select the date using the icon.

The page will automatically be updated to reflect your status for that date. For example, you may choose to view your time off status for a future date. The data will take into account any accruals or resets that will occur prior to that date. The fields will be renamed to indicate that the values are "projected", as they are in the future. You can select a date as far ahead as 50 years from today's date.

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

• Days Available as of 01/16/2005:	5
• Earned as of 12/30/2005:	0
• Taken as of 12/30/2005:	0
• Remaining as of 12/30/2005:	5

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

(Days/Hours Available + Earned) - Taken

Note: If the requested time off occurs in the past, the current taken and remaining time is displayed. If the requested time off occurs in the future, projected time taken and remaining are displayed.

Approvals

To view the **Approvals** menu, select **Approvals** from the menu bar at the top of the page.



Working with Pending Time Off Requests

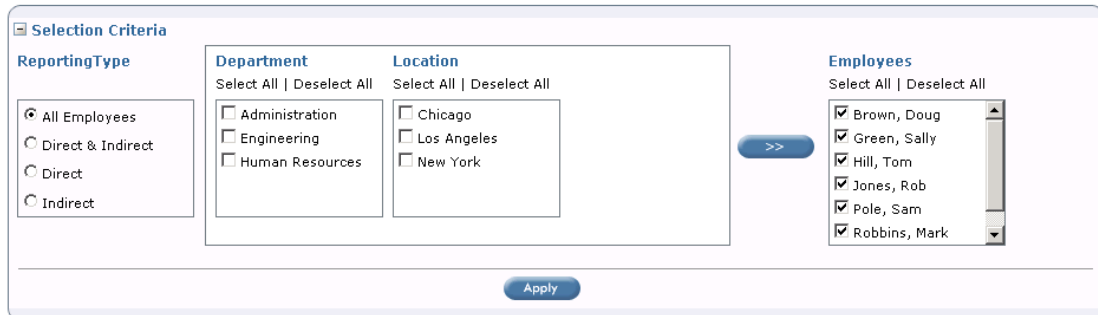
If you have permission to approve and reject requests, the **Pending Approvals** page enables you to view those time off requests waiting for approval in a list format, rather than using the calendar views. You can approve, reject, or edit the time off requests from this page.

To view a list of pending time off requests waiting for approval:

1. Select **Pending Approvals** from the **Approvals** menu. The **Pending Approvals** page is displayed.

Pending Approvals


Logged in as admin

A screenshot of the 'Pending Approvals' configuration page. It features a 'Selection Criteria' section with four sub-sections: 'ReportingType' (radio buttons for All Employees, Direct & Indirect, Direct, Indirect), 'Department' (checkboxes for Administration, Engineering, Human Resources), 'Location' (checkboxes for Chicago, Los Angeles, New York), and 'Employees' (checkboxes for Brown, Doug; Green, Sally; Hill, Tom; Jones, Rob; Pole, Sam; Robbins, Mark). An 'Apply' button is at the bottom.

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

2. Select the criteria by which to filter the employees for which requests are shown using the **Selection Criteria** section. Refer to [Filtering Employees using Selection Criteria](#) on page 28 for more information.
3. Select **Apply**.


From the **Pending Approvals** list, you can approve, reject, or edit pending time off requests as follows:

- To approve a time off request, select the check box next to the time off request(s) you want to approve and select **Approve**.
- To reject a time off request, select the check box next to the time off request(s) you want to reject and select **Reject**.
- To edit a time off request, select the  icon next to the time off request you would like to edit, or click on the name of the employee who has made the time off request. The **Approve Time Off Request** window will be displayed, where you can edit the request as necessary. You can also approve or reject the time off request in the same window.

Approving or Rejecting a Time Off Request

You can approve a time off request from the **Pending Approvals** page, or from any of the calendar views or the **List Time Off Requests** or the **Historical Time Off Requests** pages.

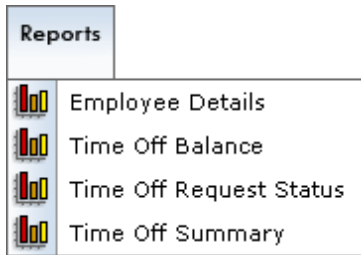
To approve or reject a time off request:

1. Select the time off request for editing.
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 from the drop-down list.
 - To edit the **Start Date** and the **End Date**, select the date using the  icon.
 - To edit the **Employee Comments**, enter the appropriate text.
 - Enter your comments before you approve or reject the time off request in the **Approver Comments** field.
3. Click **Recalculate** to display the updated time off status.
4. Under **Time Off Status**, you can review the following information:
 - **Day(s)/Hour(s) requested** displays the amount of time that the time off request covers.
 - **Taken prior to requested period** shows amount of time off the employee has previously taken in this time off type.
 - **Remaining after requested period** shows amount of time off 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. Click **Approve** to approve the time off request and **Reject** to reject the time off request.

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.

Reports

To view the **Reports** menu, select **Reports** from the menu bar at the top of the page.



Employee Details Report

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

1. Select **Employee Details** from the **Reports** menu. The **Employee Details** page is displayed.

Employee Details

Logged in as admin

Selection Criteria
Employee Status: Enabled

ReportingType

All Employees

Direct & Indirect

Direct

Indirect

Department

Select All | Deselect All

Administration

Engineering

Human Resources

Location

Select All | Deselect All

Chicago

Los Angeles

New York

>>

Employees

Select All | Deselect All

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

Generate Excel Print

Employee Details Report

Report Date: 12/30/2005

Employee Id	Employee 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. In the **Selection Criteria** section, select the criteria to use to filter which employees are included in the report.
3. Click **Generate** to view the report.
4. To save the report to an external Microsoft Excel file, click **Excel**.
5. 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** dialog box.

Time Off Balance Report

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

1. Select **Time Off Balance** from the **Reports** menu. The **Time Off Balance** page is displayed.

Time Off Balance

Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All

Administration
 Engineering
 Human Resources

Location
Select All | Deselect All

Chicago
 Los Angeles
 New York

Employees
Select All | Deselect All

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

As Of Date 12/31/2005

Time Off Type All

Display Time Off In Days

Time Off Balance Report

As Of Date: 12/31/2005
Report Date: 12/30/2005

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

2. In the **Selection Criteria** section, select the criteria to use to filter which data is provided in the report, including:
 - Select the **As Of** date using the icon.
 - Select a **Time Off Type** from the drop-down list.
3. Select whether you would like time displayed in hours or days or both from the **Display Time Off In** drop-down list box.
4. Click **Generate** to view the report.
5. To save the report to an external Microsoft Excel file, click **Excel**.
6. 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** dialog box.

Time Off Request Status Report

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

1. Select **Time Off Request Status** from the **Reports** menu. The **Time Off Request Status** page is displayed.

Time Off Request Status

Logged in as admin

Selection Criteria

ReportingType

All Employees
 Direct & Indirect
 Direct
 Indirect

Department
Select All | Deselect All

Administration
 Engineering
 Human Resources

Location
Select All | Deselect All

Chicago
 Los Angeles
 New York

Employees
Select All | Deselect All

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

Request Status All **Time Off Type** All **Display Time Off In** Days


Start Date 12/01/2005 **End Date** 12/31/2005

Time Off Request Status Report

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

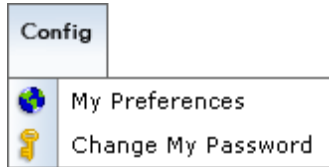
Request Status: All

<u>Employee</u>	<u>Reporting To</u>	<u>Time Off Type</u>	<u>Requested Start Date</u>	<u>Requested End Date</u>	<u>Requested Duration (Days)</u>	<u>Request Status</u>
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. In the **Selection Criteria** section, select the criteria to use to filter which data is provided in the report, including:
 - Select the **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.
3. Click **Generate** to view the report.
4. To save the report to an external Microsoft Excel file, click **Excel**.
5. 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** dialog box.

Configuration

To view the **Config** menu, select **Config** from the menu bar at the top of the page.



Modifying your Preferences

To edit your preferences:

1. Select **My Preferences** from the **Config** menu. The **My Preferences** page is displayed.

My Preferences

Logged in as admin

** Indicates required fields*

A screenshot of the "Set My Preferences" form. The form has a yellow header bar with the title "Set My Preferences". Below the header, there are two fields: "Date Format" with a dropdown menu showing "03/22/2006" and "Records Per Page*" with a text input field containing "10". At the bottom of the form, there are two buttons: "Save" and "Reset".

2. Select the **Date Format** from the drop-down list.
3. Enter the number of records you would like displayed in the list pages in the **Records per Page** field.
4. Click **Save** to save the changes.

Note: The values selected in the **My Preferences** section override the **System Preferences** settings for the employee.

Changing your Password

To change your password:

1. Select **Change My Password** from the **Config** menu. The **Change Password** page is displayed.

Change My Password

Logged in as admin

** Indicates required fields*

Password Details

Current Password*

New Password*

Confirm Password*

Save

Reset

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 **Confirm Password** (mandatory field).
5. Click **Save** to save the changes. Click **Reset** to exit without saving the changes.



Appendix A Time Off Scenarios

The section illustrates how time off is calculated in various scenarios to provide further understanding of the information provided on the **My Time Off Status** page and, in particular, in the **Time Off Summary** report. The following concepts are important when reviewing time off calculations:

- **Initial Balance:** The amount of time available to the employee at the start of the report period.
- **Change at Reset:** The amount of time gained or lost by the employee upon reset, based on the difference between the balance immediately before the reset and the balance immediately after the reset. A positive value indicates that the employee has gained time, whereas a negative value indicates that the employee has lost time due to the reset.
- **Accrued Days/Hours:** The amount of time earned over the period of time selected.
- **Days/Hours Taken:** The amount of time taken as time off during the period specified.
- **Days/Hours Remaining:** The amount of time remaining available to the employee for time off at the end of the period specified. This value is calculated as follows:

$$\text{Initial Balance} + \text{Change at Reset} + \text{Accrued Days/Hours} - \text{Days/Hours Taken}$$

The following data is used in the scenarios below:

- John Smith joined the company on June 10, 2005
- A time off type named Vacation was enabled for John with the following settings:
 - Effective Date of June 10, 2005
 - Initial Balance of 12 days
 - Accrual of 1 day, monthly on the 9th day of every month
 - Reset to 5 days every June 10th

Scenario 1: A Simple Time Off Request

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 contains the following data for the time period that includes this request.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/10/2005 - 06/30/2005	12	0	0	2	10

Scenario 2: A Time Off Request is Withdrawn

John submitted a time off request for June 20, 2005 and June 21, 2005 but withdrew the request on June 14, 2005. The **Time Off Summary** report contains the following data for the time period that includes this request. As shown, the withdrawn time off request is ignored in the **Days Taken** and **Days Remaining** calculations.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/10/2005 - 06/30/2005	12	0	0	0	12

Scenario 3: Accruals Take Effect

John has not submitted any time off requests. However, based on his time off settings, he will accrue his first additional day on July 9, 2005. The **Time Off Summary** report contains the following data for the time period that includes this first accrual.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/10/2005 - 07/31/2005	12	0	1	0	13

Scenario 4: A Reset Occurs

John has not submitted any time off requests. However, based on his time off settings, his balance will be reset on the anniversary of his hire date, on June 10, 2006. The **Time Off Summary** report contains the following data for the time period that includes this reset. Note that John has started the time period with 23 days,

which includes the 12 initially given to him and 9 days that have been accrued prior to this period, 1 on the 9th of each of the 9 months that have passed. The period also includes another accrual day on June 9, 2006.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/01/2006 - 06/30/2006	23	-19	1	0	5

Scenario 5: A Time Off Request, Accrual, and Reset

John submitted a time off request for June 21, 2006, after he has been accruing time and after the first reset of his balance. The **Time Off Summary** report, generated for the duration from June 1, 2006 to June 30, 2006, will contain the following data.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/01/2006 - 06/30/2006	23	-19	1	1	4

Scenario 6: A Time Period Covering a Portion of a Request

John submitted a time off request for the period of June 29, 2006 to July 2, 2006. The **Time Off Summary** report, generated for the duration from June 1, 2006 to June 30, 2006, will contain the following data. Note that the report only shows two days taken, as the time period specified only covers a portion of the request.

Date Range	Initial Balance	Change at Reset	Accrued Days	Days Taken	Days Remaining
06/01/2006 - 06/30/2006	23	-19	1	2	3



Appendix B Sample Data

The sample data is available only for the demonstration version of Web TimeOff. Web Time Off has created 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:

- Employees
- Employee types
- Categories
- Time off types
- Permission types
- Holiday calendars
- E-mail templates

Employees

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

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

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

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

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

Employee Types

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 accessible to the employees of Nebula Inc.

Employee	Category	Groups
Doug Brown	Department, Location	Administration, 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 members 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.

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

Permission Types

There are four permission types defined, they are:

- Administrator
- Manager
- Supervisor
- Time Off User

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

Employee	Permission Type
Doug Brown	Administrator
Rob Jones	Supervisor
Sally Green	Manager

Employee	E-mail Notification Template
Rob Jones	Time Off Request Approved, Time Off Request Rejected, Time Off Request Waiting for Approval, Time Off Request Withdrawn
Sally Green	Time Off Request Approved, Time Off Request Rejected, Time Off Request Waiting for Approval, Time Off Request Withdrawn
Mark Robbins	Time Off Request Approved, Time Off Request Rejected
Tom Hill	Time Off Request Approved, Time Off Request Rejected
Sam Pole	Time Off Request Approved, Time Off Request Rejected
Frank Young	Time Off Request Approved, Time Off Request Rejected



Appendix C Using the Administrative Utilities

SendWelcome Utility

Web TimeOff includes an e-mail notification that, when enabled, is automatically sent to employees as soon as they are added to Web TimeOff. This e-mail notification, named **Welcome message**, introduces the system to the new employees and provides them the necessary information to access Web TimeOff.

In some cases, it may be desirable to delay this e-mail notification so that it is not automatically sent when employees are added. For example, a system administrator may choose to add all of their employees at once when configuring the system, but may wish to introduce the system in stages, starting with only one department or group within the organization. In this case, it would be ideal to send the e-mail notification to employees within the first department immediately and to the other employees later, as the system is implemented in their department.

To assist with this, a utility has been provided with Web TimeOff that allows you to manage when the welcome e-mail notification is sent to employees. The **SendWelcome** utility uses the template and options set in Web TimeOff for the **Welcome message**. As a result, the e-mail notification will appear identical to the employee whether it was sent automatically or using the utility.

To customize when the notification is sent, the automated notification is first disabled and then the **SendWelcome** utility is used as needed to welcome employees.

Disabling the Automated Welcome E-mail Notification

To disable the welcome e-mail notification from being automatically sent when an employee is added:

1. Select **E-mail Notifications** from the **Administration** menu.
2. Select the **Welcome message** notification from the list provided.

3. Clear the **Enabled** checkbox to disable the notification from being sent automatically when an employee is added.
4. Verify that the **Reply To** address is valid, as this is shown as the e-mail address to reply to whether the notification is sent automatically or using the **SendWelcome** utility.
5. Select **Save**.

Note: The **SendWelcome** utility uses the template and options set in Web TimeOff for the **Welcome message** when generating the e-mail notification, so ensure that the **Subject** and **Body** are filled in correctly.

Manually Sending the Welcome E-mail Notification

To manually send the welcome notification to one or more employees:

1. Select **System Preferences** from the **Administration** menu.
2. Select the **E-mail Settings** tab.
3. Ensure a valid mail server and e-mail address are specified.

The screenshot shows the 'System Preferences' window with the 'E-mail Settings' tab selected. The window title is 'System Preferences' and it shows 'Logged in as admin' in the top right corner. Below the title bar, there are two tabs: 'General*' and 'E-mail Settings*'. The 'E-mail Settings' tab is active and contains the following fields:

- Outgoing Mail Server (SMTP):** localhost
- Port:** 25
- Web TimeOff E-mail Address*:** noreply@yourcompany.com

At the bottom of the window, there are two buttons: 'Save' and 'Reset'.

4. Select **Save**.
5. Run the `SendWelcome.exe` utility, which can be found in the `ApplicationRoot\bin` folder where Web TimeOff was installed (typically `C:\Program Files\Replicon Inc\Web TimeOff`). Note that the utility must be run from this location, on the server where Web TimeOff was installed.

Root User Account

In the case that the system administrator account is inadvertently disabled, deleted, or modified, a back up account was created during installation to allow you to restore the system administrator account settings. To access the Web TimeOff system, log in using the **User Name** `root` and the password you specified for the account during installation. This account will allow you to add or edit the system administrator employee account as needed.

Troubleshooting the System Administrator Account

If you have trouble accessing the system using the system administrator account, log in using the `root` user account and complete the following:

- Verify that the system administrator account still exists in the **List Employees** page. If not, add the system administrator as an employee, with the necessary permissions.
- Verify that the system administrator account has not been disabled. To do this, select the account from the **List Employees** page and confirm that the **Enabled** check box is checked.
- Verify that the system administrator has the necessary permissions. To do this, select the account from the **List Employees** page, select the **Permission Types** tab, and confirm that the appropriate permission type is enabled.
- Verify that the system administrator's **User Name** or **Password** have not been changed. To do this, select the account from the **List Employees** page and verify that the **User Name** shown is correct. Enter the desired password in the **Password** and **Confirm Password** fields and select **Save**.

Log out of the system and attempt to log back in using the system administrator account. If you have further difficulty accessing the system administrator account, please contact Customer Support. See [Contacting Replicon](#) on page 2 for contact information.