



Timesheet Tool Manual

WorkDo Tool Guide

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Advanced Tools

WorkDo has many tools for different levels within a workplace. This means workplaces, groups, and buddies all have a specific Do button and a set of tools to use. Please see Table I-1 for available tools at each level.

Advanced tools such as Timesheet, Payroll, Attendance, Check-In, Leave, Leave Pro, Overtime, Expenses, and Approvals are dependent on the HR tool. The HR tool is activated once you have created a workplace and need to manually activate the advanced tool according to your company's needs. This also means the HR tool needs to stay activated for the other tools to function.

The Timesheet tool is one of the advanced tools interconnected to the HR tool. So, please be sure that you have completed all the HR settings and configurations described in the [HR Tool Manual](#) before activating the tool for use.

▼ Table I-1. WorkDo Advanced Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Check In	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Shift	●	x	x	HR required for clock in/out
Overtime	●	x	x	HR
Timesheet	●	x	x	HR

Tool	Workplace	Group	Buddy	Dependency
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

II Timesheet: Project Time Tracking Tool That Optimizes Productivity

What can Timesheet do for your team?

- **Effortless project and task management.**

Timesheet allows users to create multiple projects based on different clients, collaborations, and tasks.

- **Real-time work hours update.**

Allocate company manpower and resources based on real-time updates from the employees to improve team productivity.

- **Accurate time tracking to maintain a healthy work-life balance.**

The HR Staff can fill out or edit employee work hours when they fail or forget to do so. These actions help create an accurate picture of employees' workload, allowing managers to grasp each employee's workload and make the necessary

adjustment to reduce employee burnout.

- **Tool integration and work hours summary.**

Timesheet makes it easy for employees to keep an eye on their work hours, and the Overtime tool is integrated to remind them to file overtime requests when they put in the extra work.

- **Comprehensive reports are available.**

Generate detailed work hours reports based on employees, projects, or by days, and these reports offer managers a way to allocate resources at a moment's notice.

Ready to give Timesheet a try? Well, Timesheet's settings are easy, and it won't take long! But since Timesheet is connected to the HR tool, you will first need to complete the settings related to Timesheet, as described in Table II-1.

▼ Table II-1. Timesheet-HR Dependency

HR Setting	Dependency (* must set)
*Work Hours	Set daily work hours.
*Employee Profiles	Choose a work schedule for each employee.
*Projects	Set projects and sub-project for employees to log their time.

Set Up

This section will guide you on how to set up the Timesheet tool. The process includes 3 stages, and it requires a member with the HR Staff tool role to do so. The Timesheet tool is connected to the HR tool, so please refer to the [HR Tool Manual](#) for details.



Tool Activation

Set workplace admins
Activate HR
Activate Timesheet

Settings

HR > Projects
Timesheet > Settings
Timesheet > Autofill Settings

Start

Log time
HR Staff > edit / log time
Report export

▲ Image III-1. Setup Process

STEP 1. Tool Activation

WorkDo has two types of admins that help your workplace manage and control information access, they are [workplace admins](#) and [tool admins](#), as seen in Table Step 1-1.

Workplace admins include the owner and multiple admins who can adjust workplace settings. Normally, the workplace admins are the management of IT employees. The tool admins control the tool settings and data. The tool activation is done by the workplace admins, and different tools could have different tool admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x

Authority	Workplace Owner	Workplace Admin	Tool Admin
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool data	x	x	●

a.Assign Workplace Admins

Based on Table STEP 1-1, workplace admins have one of the highest authority and access. If you are a workplace admin already, you can skip this portion and go to [Step 1-b Set Tool Roles](#), else, you need to have one of the admins appoint you.

Manage Workplace Admins

1. Have a workplace admin go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin.
 - The red crown marks the owner, who, aside from being one of the workplace admins, can also delete the workplace.
 - The blue crowns mark the workplace admins, who are assigned to maintain the workplace settings.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only options.

b.Set Tool Roles

WorkDo's advanced tools require some workplace members to take the management role to operate smoothly. Please read the description of the roles for each tool carefully when assigning tool roles to each member.

The Timesheet tool roles are listed below.

- No Role: These employees will not see the Timesheet tool at all.
- Employee: These employees can use Timesheet to log their time for the projects that they are assigned.
- Project Manager: Managers can view project details and log their times.
- HR Viewer: HR Viewers can view all records and data but cannot edit them.
- HR Staff: The HR Staff has the highest access level and manages all records and data.

Note that, upon tool activation, only the workplace owner is assigned as the HR Staff, and the rest will be employees.

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and click the Advanced tab.
4. Make sure Timesheet is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar to quickly find members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2 .Start

Timesheet is a tool that allows company employees to log their working time spent on different projects and tasks so managers can distribute resources based on priorities. The timesheet reports offer insights into the man-hours required for different projects and whether they are progressing as scheduled.

As mentioned prior, you must complete the necessary settings in the [HR tool](#) first before deploying Timesheet for use.

a.Timesheet Settings

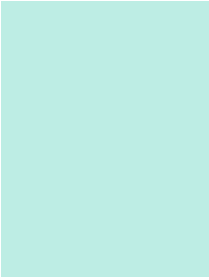
Tool Role	<input type="radio"/> Employee <input checked="" type="radio"/> HR Staff <input type="radio"/> HR Viewer <input type="radio"/> Project Manager	Interface	<input checked="" type="radio"/> Web <input type="radio"/> App
Data Integration	When employees' daily work hours limit is not set, employees' working time will be based on two settings in the HR tool. <input checked="" type="radio"/> Work Hours <input checked="" type="radio"/> Employee Profiles		
Key Setting	First Day of the Week, Work Hours, Time Log Reminder.		

Timesheet Settings

1. From the workplace page > Do > Timesheet > Management > Settings.
2. Click Update (* must be filled).
 - First Day of the Week.
 - Set Work Hours:
 - ➔ No: Employees' work hours are based their employee profiles' time.
 - ➔ Yes: Set a limit for the number of work hours per day.
 - Enable Reminder:
 - ➔ No: Do not send reminders to remind employees to log their work hours.
 - ➔ Yes: Set a weekly reminder time to remind employees to log their work hours.
3. Click Save to finish.

b. Work Hours Autofill Settings

<u>Tool Role</u>	<input type="radio"/> Employee <input checked="" type="radio"/> HR Staff <input checked="" type="radio"/> HR Viewer <input checked="" type="radio"/> Project Manager	Interface	<input checked="" type="radio"/> Web <input type="radio"/> App
Data Integration	<input checked="" type="radio"/> Preliminary Setup: Timesheet > Settings <input checked="" type="radio"/> Effect: Timesheet > My Timesheet		
Key Setting	<p>The system could autofill work hours for employees who often forget to log their work hours based on the autofill settings. The employees or the HR Staff can update the work hours if required.</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Project-based autofill. <input checked="" type="radio"/> Employee-base autofill. <input checked="" type="radio"/> Set to autofill ahead of time or afterward. 		

- 
- ➔ Autofill Settings are not retroactive.
 - ➔ The system does not autofill future workdays, only the day before or the current workday.
 - ➔ The system will disregard when work hours from different projects exceed the employees' daily work hours limit.

Work Hours Autofill Settings

1. From the workplace page > Do > Timesheet > Management > Autofill Settings.
2. Select a project and click the Edit button to fill out the fields (* must be filled).
 - Autofill Timesheet
 - ➔ No: Autofill not enabled.
 - ➔ Yes: Autofill enabled.
 - ✓ Default Autofill Work Hours: Autofill the same amount of time for all project members.
 - ✓ Employee Default Autofill Work Hours: Autofill different amounts of time for different project employees.
 - Autofill Type: Default is set to autofill work hours beforehand and it takes effect the next day after it is set.
 - ➔ Beforehand: The system autofills the current workday's project work hours beforehand.
 - ➔ Next Day: Work hours are autofilled the next workday.
3. Click Save to finish.

c. Project Information Update

<u>Tool Role</u>	<input type="radio"/> Employee <input checked="" type="radio"/> HR Staff <input type="radio"/> HR Viewer <input checked="" type="radio"/> Project Manager	Interface	<input checked="" type="radio"/> Web <input type="radio"/> App
Data Integration	<ul style="list-style-type: none"><input checked="" type="radio"/> Preliminary Setup: HR tool > Projects<input checked="" type="radio"/> Effect: Timesheet > My Timesheet		
Key Setting	<ul style="list-style-type: none">● Member List: Only selected project members are required to log their work hours.● Project Description: Informational purposes only, not viewable by project members.		

Project Information Update

1. From the workplace page > Do > Timesheet > Management > Projects.
2. Select a project and click the Edit button to fill out the fields (* must be filled).
 - Member List: Select project members then click Save to finish.
 - Project Description: Input required project information.
3. Click the Save button to finish.

d. Log / Edit Work Hours

<u>Tool Role</u>	<input checked="" type="radio"/> Project Employee	Interface	<input checked="" type="radio"/> Web <input checked="" type="radio"/> App
Data Integration	<p>Projects are created using the HR tool; if there is anything that needs to be updated, please ask the HR Staff of the HR tool to do so.</p> <ul style="list-style-type: none"><input checked="" type="radio"/> Projects: HR tool > Projects		

- Employee Daily Work Hours Limit: If employees' daily work hours limit does not use the setting as described in STEP 2-a, then it will comply with the work hours settings in their employee profiles of the HR tool.

Functions

The functions below are available to project members.

- Log project work hours
- Add project activities
- Report progress
- Edit work hours

Field	Description	Note
Project	Add projects to log work hours. ● Log project work hours.	Please ask the HR Staff of Timesheet to include you as a project member if you are unable to log project work hours as described in STEP 2-c.
Parent Project	Display what main project this project is part of.	Main projects and sub-projects can be configured in the Projects setting of the HR tool.
Work Hours	Log project work hours, click a field to log your time. ● Add project activities. ● Edit activities and work hours. ● Update and delete work hours.	
Total	● Weekly total project work hours. ● Daily total work hours for various projects.	



What's my daily working time limit?

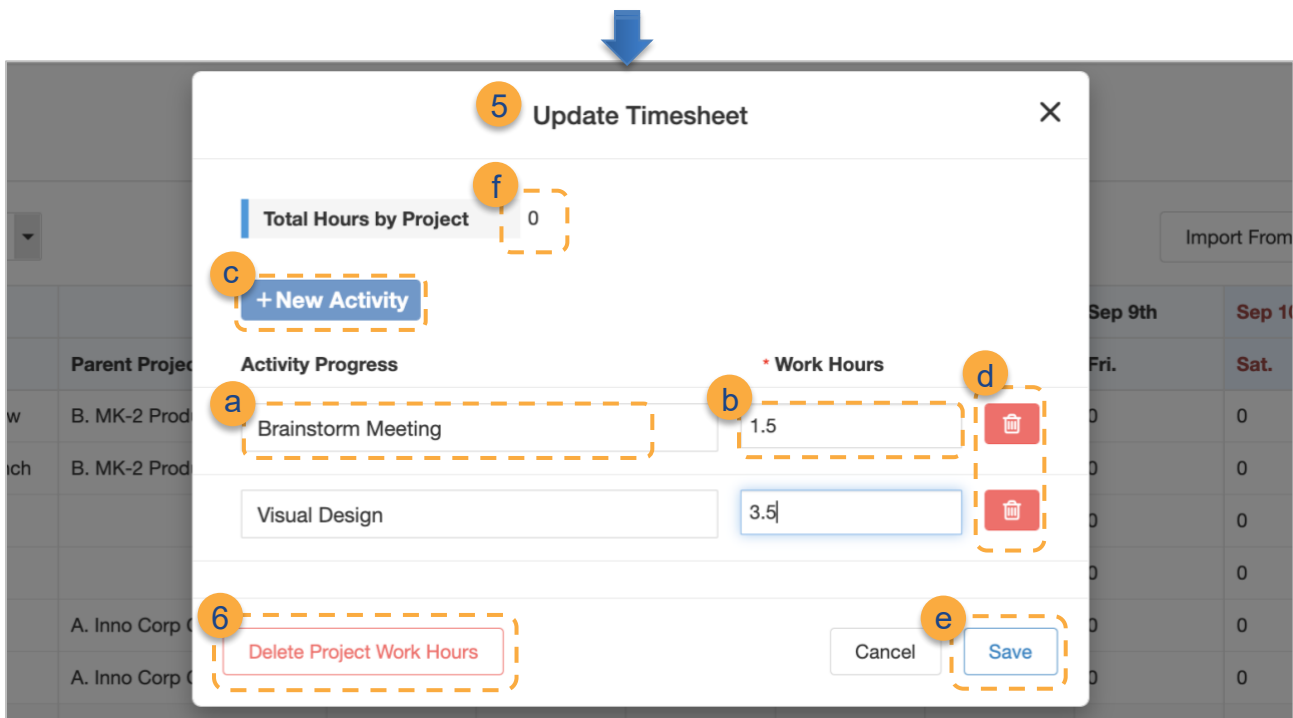
Please ask the Timesheet HR Staff to refer to STEP 2-a for your daily work hours limit. You can view this information in your employee profile if your work hours are set via the HR tool.

- Web: Do > HR > My > Profile > Work Time Information
- App: Do > HR > Profile > Work Time Info

The screenshot shows the 'MyTimesheet Records' page. Callout 1 points to the 'My' menu in the top left. Callout 2 points to the date range selector '2022-09-04 - 2022-09-10'. Callout 3 points to the 'Add Project' button. Callout 4 points to the 'Import From Last Week' button.

			Sep 4th	Sep 5th	Sep 6th	Sep 7th	Sep 8th	Sep 9th	Sep 10th	
	Project	Parent Project	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Total Hours by Project
	B01. Consumer Electronic Show	B. MK-2 Product Launch	0	0	0	0	0	0	0	0
	B02. Live Stream Product Launch	B. MK-2 Product Launch	0	0	0	0	0	0	0	0
	A. Inno Corp Collaboration		0	0	0	5	0	0	0	5
	B. MK-2 Product Launch		0	0	0	0	0	0	0	0
	A01. Online Marketing	A. Inno Corp Collaboration	0	0	0	0	0	0	0	0
	A02. Web Design	A. Inno Corp Collaboration	0	0	0	0	0	0	0	0
	Daily Total		0	0	0	5	0	0	0	

- 1 ▶ From the workplace page > Do > Timesheet > My > Timesheet.
- 2 ▶ Select a work week using the calendar.
- 3 ▶ Click Add Project to add projects that you are responsible for.
- 4 ▶ Use the Import From Last Week button if your projects and work hours stay the same as last week.



- 5 ► Log or edit work hours.
Click a cell to log or edit your project work hours.
 - a. Activity: Use to describe the task you did.
 - b. Work Hours: Input your work hours up to the second decimal place.
 - c. +Add Activity: Add more activities as needed.
 - d. Delete: Click to delete the activity.
 - e. Click Save to log the project work hours.
 - ➡ When the project work hours exceed your daily limit, you will be notified to file for overtime.
 - ➡ When you are on leave and try to log work hours, you will be asked to fill out a reason.
 - f. Daily Total and Project Total work hours are shown.
- 6 ► Delete Project Work Hours: Click to reset the project work hours back to zero.



App Operation

- Log Work Hours: Do > Timesheet > + Button> Select a date then project.
- Edit: Click on an established work hours to enter the edit screen.
- Delete Project Activity: Click the – button to delete project activity and its work hours.
- Delete Project Work Hours: On the edit screen and click the Delete button to delete the project work hours.

e.Project Update

Tool Role

- Project Employees

Interface

- Web ○ App

Data

- Preliminary Setup: HR tool > Projects

Integration

- Effect: Timesheet > [My Timesheet](#)

Function

Change the projects you are responsible for.

1	MyTimesheet Records					
	2022-09-04 - 2022-09-10					
2			Sep 4th	Sep 5th	Sep 6th	
			Sun.	Mon.	Tue.	
		B01. Consumer Electronic Show	B. MK-2 Product Launch	0	5	0
		B02. Live Stream Product Launch	B. MK-2 Product Launch	0	0	0
		A. Inno Corp Collaboration		0	0	0
		B. MK-2 Product Launch		0	0	0
		A01. Online Marketing	A. Inno Corp Collaboration	0	0	0
		A02. Web Design	A. Inno Corp Collaboration	0	0	0

- 1 ▶ From the workplace page > Do > Timesheet > My > Timesheet.
- 2 ▶ Select a work week.
- 3 ▶ Click the Add Project button to add projects you are responsible for.
- 4 ▶ Click the delete icon on the left to remove projects.



Please note that project update cannot be done using the app version.

f.Updating Employee Work Hours as an HR Staff

A typical workday can be hectic, and employees are bound to forget to log their work hours occasionally. As such, Timesheet offers a way for the HR Staff to edit the work hours in situations like this. However, this update method only serves as a last resort. For data integrity, we highly recommend that any updates are done by the project employees themselves.

<u>Tool Role</u>	○ Employee ● HR Staff	Interface	● Web
	● HR Viewer ○ Project Manager		○ App
Data	● Work Hours		
Integration	● Employee Profiles		
Function	● View and update employee work hours records.		
	● The system records any <u>record updates</u> done by the HR Staff.		

Record Update by HR Staff

1. From the workplace page > Do > Timesheet > Management > Modify Timesheet.
2. Use the filters to narrow your search.
3. Create a project work hours record (* must be filled).
 - Click + Create button and fill out the date, project, employee, and project activities.
 - Click Save to finish.
4. Modify a record.
 - Continue from step 2, select a record, and click the edit icon to update.
 - Click Save to finish.
5. Delete a record.
 - Continue from step 2 and click the delete icon next to a record to delete.

g. Timesheet Modification Log

<u>Tool Role</u>	<input type="radio"/> Employee <input checked="" type="radio"/> HR Staff	<u>Interface</u>	<input checked="" type="radio"/> Web
	<input checked="" type="radio"/> HR Viewer <input type="radio"/> Project Manager		<input type="radio"/> App
Data Integration	Timesheet > Management > Timesheet Modification Log		
Function	The modification log keeps track of the record updates done by the HR Staff. You can use it to verify any changes and updates.		

View Timesheet Modification Log

1. From the workplace page > Do > Timesheet > Management > Timesheet Modification Log.
2. Use the filters to narrow down your search.
3. Click on a record to view its details, including the original data and who updated it.

h.Report Export

<u>Tool Role</u>	<input type="radio"/> Employee <input checked="" type="radio"/> HR Staff <input checked="" type="radio"/> HR Viewer <input type="radio"/> Project Manager	Interface	<input checked="" type="radio"/> Web <input type="radio"/> App
Data	<input checked="" type="radio"/> Timesheet > Management > Modify Timesheet		
Integration	<input checked="" type="radio"/> Leave Pro > Company Leave Records <input checked="" type="radio"/> Overtime > Company Overtime Records		
Function	<input checked="" type="radio"/> There are four types of timesheet reports, each with a purpose of its own. You can use them to track employee work hours, calculate man-hours and timely allocate resources.		

- **Project Timesheets**

- ➡ Download timesheet reports based on individual projects.

- **Employee Timesheets**

- ➡ Download timesheet reports based on individual employees.

- **Timesheet Records**

- ➡ Download reports that list all employees' timesheet records for all projects.
- ➡ Integrated with Leave Pro and Overtime tools. Records are marked if

leave and overtime requests were applied.

- ➔ The discrepancy check checks for records that exceed employees' working time.

- **Timesheet Activities**

- ➔ Download reports that list all employees' timesheet activities for all projects.
- ➔ Blank activity fields mean either the employees left them blank, or the records were autofilled by the system.
- ➔ Integrated with Leave Pro and Overtime tools. Records are marked if leave and overtime requests were applied.
- ➔ The discrepancy check checks for records that exceed employees' working time.
- ➔ When employees are on leave but also input their work hours, the remark field is there for them to state the reason for the overtime work.

Timesheet Report Export

1. At the Timesheet menu, select a desired report to download as an HR Staff or HR Viewer.
2. Use the filters to narrow down the report range.
3. Click the Export button to download the report in Excel format.



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WorkDo



Manuals