Check In Tool Manual

WorkDo Tool Guide

V.230721

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I Advanced Tools

WorkDo has many tools on the Do page for different levels within the workplace. This means workplaces, groups, and buddies all have a specific Do button and set of tools to use. Below is Table I-1 which shows which tools are available at which level.

Tools such as HR, Leave, Expenses, and Approvals are set to activate once you created a workplace while other tools such as Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses, and Approvals (depending on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ 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
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	

Tool	Workplace	Group	Buddy	Dependency
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

II Check In: An Alternative Attendance Tool for Your Mobile Workforce

It is common for the mobile workforce to travel from place to place, visiting clients, and partners, and due to the nature of their work, it can be difficult to get a hold of them or keep track of their whereabouts; with the Check In tool, your mobile workforce can check in/out locations via GPS with times recorded so the supervisors would have an easier time managing them.

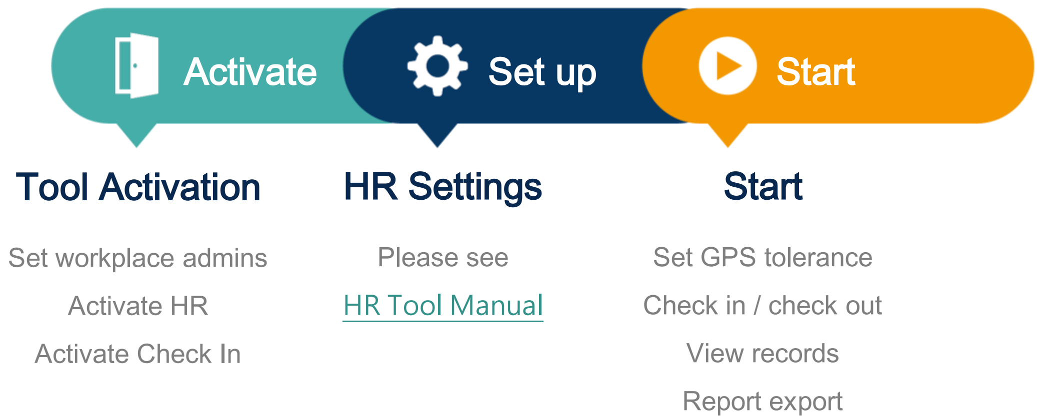
The Check In tool provides another way for the mobile workforce to report their locations and progress while on the run and it is connected to the HR tool (see Table II-1), so please use the HR Tool Manual to set up the Check In tool beforehand.

▼ Table II-1. Check In-HR Dependency

HR Setting	Function (* Must be filled)
*Departments	View department check in/out records for department managers.
*Employee Profiles	Assign employees to their respective departments.

III Set Up

Please follow the instructions to set up the Check In tool for use.



▲ Image III-1. Setup Process

STEP 1 . Tool Activation

To ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins (Table Step 1-1).

Workplace admins include an owner and multiple admins who can adjust workplace settings, typically, this responsibility falls on the IT employees or the management level while tool Admins control the tool access and data of each tool. Tool activation, however, is done by the workplace 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
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●
Maintain tool data & records	x	x	●

a.Confirm / Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to Step 1-b Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Have the workplace admins to 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. Limit to one.
    - 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 menus.

b.Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are three roles: No Role, Member, and Tool Admin. Members could submit approvals, while Tool Admins could submit approvals as well as configure related settings. Upon tool activation, the system will automatically assign all everyone as members and workplace admins as Tool Admin(s). If your tool authority is set to No Role, the Approvals tool will not appear in your tool box.
In addition, your responsibilities in Approvals are tied to your department and level of

management in the HR tool settings, therefore, upon using the Approvals, please see STEP 2-b in the Human Resource Manual to complete its settings.

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 the Activated tab is available for you to activate, deactivate and manage tools.
4. Make sure the Approvals is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the 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

For employees who spend most of their time visiting clients or running errands, it can be difficult for them to clock in and clock out like the rest of the desk employees or to report their progress promptly. Now that the Check In tool is available, your mobile workforce can more accurately detail their outlook for the day by checking in and out of places and the time they spend at each place, allowing the managers to better allocate their resources.

The Check In tool is linked to the HR tool, so please be sure to Table II-1 and the Human Resource Manual for detailed setup and instructions.

a.Set GPS Tolerance

Please ensure you are the tool admin (HR Staff) of the Check In tool as described in STEP 1 before proceeding. GPS Tolerance is the only setting option of this tool, it dictates the radius which the employees must be in to check in and check out of places, and the default is set to 300 meters.

Example:

- Check In
  Generally, consumer-grade GPS receivers are not as accurate, so GPS drift may occur, meaning your actual location may slightly differ from your recorded location. To give your mobile employees a little flexibility, the radius you set here will affect how far employees can check in when they enter the set radius of a place.
- Check Out
  Taking into consideration that employees might be checking out of places as they leave, the set radius should be somewhat generous, and the radius you set will affect whether they are allowed to check out of places should they exceed the limit.

Follow the steps below to set the radius (aka GPS Tolerance).

Set GPS Tolerance

1. Select the Check In tool.
2. Click Settings.
   - App: Click More on the bottom right tab and select Settings.
   - Web: Click Settings on the side menu.
3. Click the Edit button and enter a value.
4. Click Save to complete.

b.Check In / Check Out

When your mobile employees are on the move, they can check in and check out of places and attach files and photos with remarks to report their progress. The system will record their times stayed.

Please note that the Check In tool is only supported by the app version of WorkDo.

Check In / Check Out (App only)

1. Select the Check In tool.
   - The + Button: Click + on the main page > Check In.
   - Dashboard: Click the Dashboard > Check In.
   - The Do button: Click the Do button > Check In.
2. Confirm location, attach photos and files, and input a remark.
   - Location: If your GPS location is off, please tap the address and move your location based on the GPS Tolerance.
     - ➲ Move the map pin to the correct location.
     - ➲ Enter the correct address.
   - Attach images and files as needed.
   - Input a comment or remark to report your progress as needed.
3. Click the Check In button the check in to the place, the check in time is recorded.
   - Check Out button: Once an employee checks in to a place, the Check In button will change to the Check Out button. Tap the button to check out. If the employee is outside of the GPS tolerance range will not be able to check out.
   - Repeat the process to check in/out of new locations.

Q1. Is there a way rectify it when I forget to check out?

- No, but you may ask the HR Staff to help you fill in your check out time when they export the report described in STEP 2-e.

Q2. Can I check in to a new location when I forgot to check out of the last location.

- Yes.

Q3. Can I attach images and files afterwards?

- Yes, please refer to STEP 2-d.

c.View Check In / Check Out Records

Based on STEP 1-b Set Up Tool Roles, the available options are slightly different depending on your role. While the user interface remains the same, members with higher authorities will have the option to check records as seen in the table below.

▼ Table STEP 2-c. Check In Authorities

Option	Difference	Member	Manager	Tool Admin	Tool Admin Manager
My Records	Member' s	●	●	●	●
Dept. Records	Dept. Members'	x	●	x	●
All Records	Workplace Members'	x	x	●	●

View Check In/Out Records

1. Select the Check In tool.
2. Select a record option based on Table STEP 2-c.
   - App: Tap on My Records or Dept. Records and All Records on the More tab.
   - Web: Select a record option.
3. Use the available filters to narrow down your search.
4. Click on a record for detailed view.

d.Upload Images and Files to a Record

If you want to upload photos, files or leave a comment to a check in/out record, you may do so by following the steps below.

Upload Images and Files to a Record

1. Select a record based on the steps described in STEP 2-c.
2. Click the Edit button then upload images and files or input a comment as desired.
3. Click Save to complete.

e.Report Export

Note that report export is a web-only function and only members with the HR Staff (aka tool admin) tool role are allowed to export check in/out reports.

- **Check In Record Report**
  Exports employees' check-in records.
- **Check In Time Report**
  Exports employees' total hours of their check-in time.

Export Check In/Out Reports (Web only)

1. Select the Check In tool and click on the Report option.
2. Use the available filters to narrow down your search.
3. Click Export CSV to export the report in Excel format.

You may use Check In in conjunction with Attendance for employees' daily clock in/out.