HR Tool Manual

WorkDo Tool Guide

V.221202

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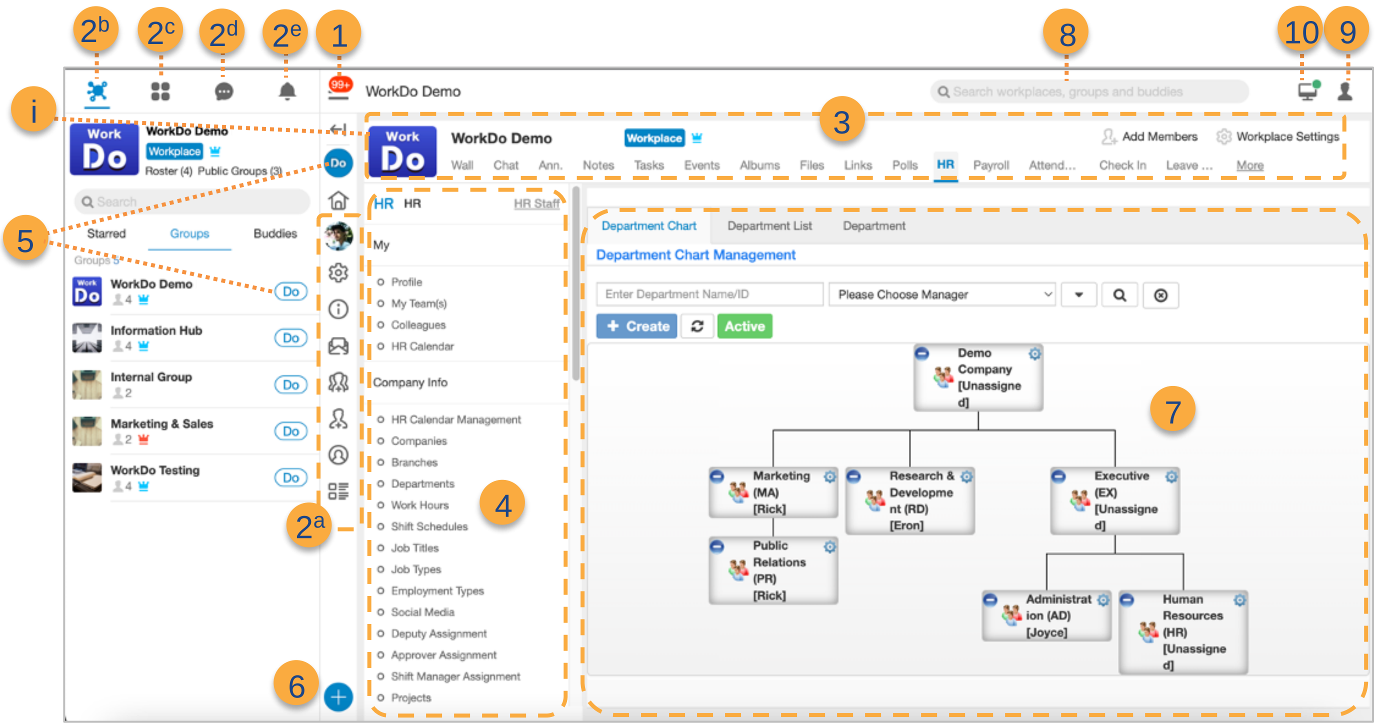
I Page Navigation

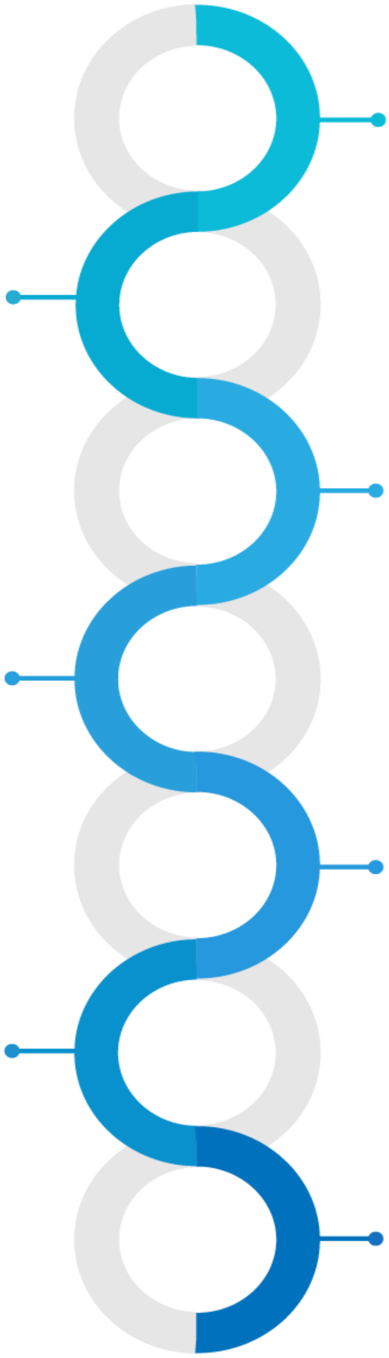
WorkDo! This document will guide you through the steps in setting up the HR tool using the web interface. We will begin with the basic page navigation!



i	Expand/Close	Expand or close general navigation areas, a button panel will appear when the navigation area is closed.
1	Workplaces	Switch between workplaces/My Upcoming/My Shelf and Join/Create Workplaces.
2	Main Menu	a. Workplace Settings: The main workplace functions. b. Group/Buddy list: Your list of groups and buddies. c. Dashboard: Your personalized shortcuts. d. Chatrooms: All the chatrooms you are in. e. Notifications: All notifications related to you.
3	Level Options	The tools, functions, and options are available with respect to your level and your role.
4	Sub-Menu	Displays 2, 3, and 5 functions respectively.
5	Do Button	All the tools you can use in the workplace.
6	Create Button	Create new items.

7	Main Page	The main working area, it displays contents from 1-6.
8	Search Bar	Use the search bar for keyword search.
9	My Settings	User’ s personal settings such as preferences, account management and password.
10	Connection	Your connection status.

Check Image I-1 to quickly start navigating WorkDo!



Log In
- Default is the last workplace you logged out of.

Dashboard
- Click 2^c to quickly verify all things that concern you.

Workplaces: Switch / Create / Join
- Click 1 to show the workplace list.
- Click 5 to show all tools you can use in this workplace.
- Click 2^a to create groups and add buddies.

Groups & Buddies
- Click 2^b to switch groups or buddies.
- Click the Do buttons for available tools to collaborate.

View/Create/Edit
- Click 6 to create new posts or items.
- Detailed content is displayed in 7.
- Click i to expand main page.

Notifications
- Click 2^e to view notifications.

Chatrooms
- Click 2^d to display all chatrooms.
- Select a chatroom to send messages.

▲ Image I-1. Quick Start

II 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 II-1 for available tools at each level.

Advanced tools such as Expenses, Leave, Leave Pro, Attendance, and Approvals depend on the HR tool. The HR tool is activated once you have created a workplace. Then you need to manually enable the advanced tool based on your company's needs, which means the HR tool needs to stay activated for the other advanced tools to function correctly.

▼ Table II-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	
CRM	●	x	x	
Cashbook	●	●	●	

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

III HR Tool: The Pillar of WorkDo

The HR tool is the cornerstone of WorkDo and is integral to all the advanced tools. The HR settings are the basis of all other tools. So, a well-maintained HR tool will offer a user-friendly experience for your entire team.

▼ Table III-1. Key HR Settings and Functions

HR Setting	Function (* Must be filled)
*System Settings	Clock rule for new employees, request workflow, etc.
*Work Hours	Set fixed work hours; it affects how lateness and total work hours are calculated.
*Departments	The default request workflow is handled by the department managers, but details and exceptions can be made in employees' profiles.
*Employment Types	It affects employees' eligibility for using some features and receiving certain leaves.
*HR Calendar Management	Set workplace calendars for calculating employee attendance.
*Employee Profiles	It contains detailed employee information and important settings that affect how tools are being used by each employee.
Deputy Assignment	Set deputies for employees when they go on vacation.
Approver Assignment	Set designated approvers for request sign-off.
Shift Schedules	The equivalent of the HR Calendar for employees who work on Shift Schedules.

HR Setting	Function (* Must be filled)
Shift Manager Assignment	Shift Managers are responsible for signing off requests for employees who work on Shift Schedules.
Projects	A setting designed for the Timesheet tool for employees to report project work hours.

The table below shows each tool’ s correlation to the HR settings.

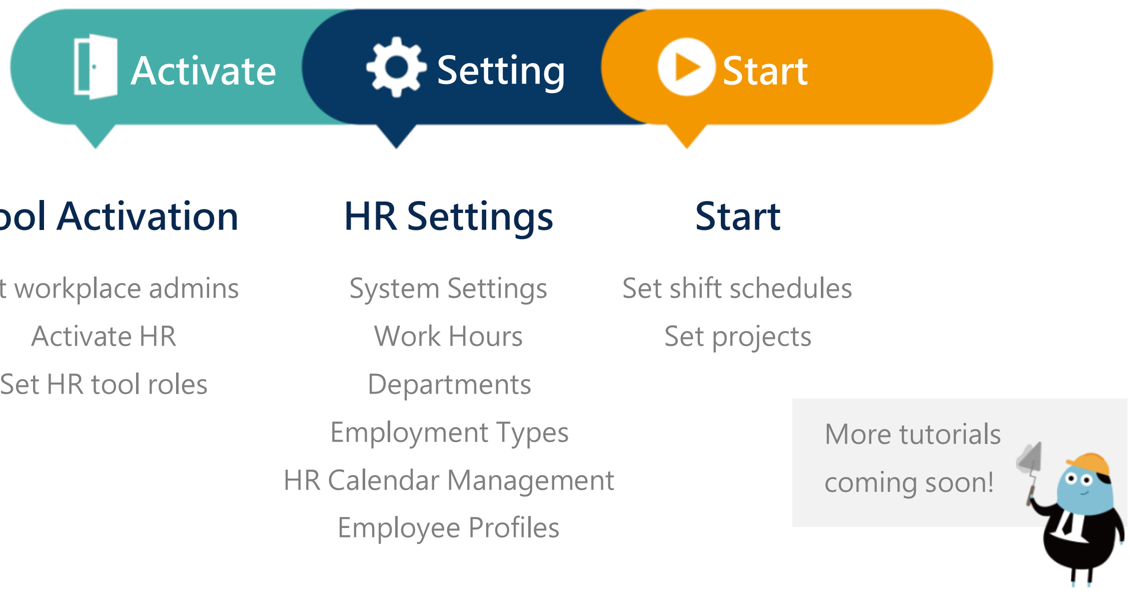
▼ Table III-2. HR Tool

HR Setting	Payroll	Attendance	Check In	Leave	Leave Pro	Shift	Overtime	Timesheet	Expenses	Approvals
*System Settings	x	●	x	●	●	●	●	x	●	●
*Work Hours	x	●	x	x	●	x	●	x	x	x
*Departments	x	●	●	●	●	●	●	x	●	●
*Employment Types	x	x	x	x	●	x	●	x	x	x
*HR Calendar Management	x	●	x	x	●	x	●	x	x	x
*Employee Profiles	●	●	●	●	●	●	●	●	●	●
Deputy Assignment	x	x	x	●	●	x	x	x	x	x
Approver Assignment	x	x	x	x	x	x	x	x	●	●
Shift Schedules	x	●	x	x	x	●	x	x	x	x
Shift Manager Assignment	x	●	x	x	x	●	x	x	x	x
Projects	x	x	x	x	x	X	x	●	x	x

WorkDo

IV Set Up

This section will guide you on how to set up the HR tool. The process includes three stages and requires a member with the HR Staff tool role. Now let’ s begin, shall we?



▲ Image IV-1. Setup Process

Each step of the setup requires you to manage different data. Please follow Table IV-1 for details.

▼ Table IV-1. Required Data

Procedure	Required Data	Note
Set tool roles	✓ Activate HR ✓ Select tool admins	✓ By workplace admins.
HR setup	✓ Departments (Incl. Managers) ✓ Set up Employment Type, Dept., On Board Date, Work Hours, Dotted-Line Manager and Deputy of each employee.	✓ By HR Staff of the HR tool

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.

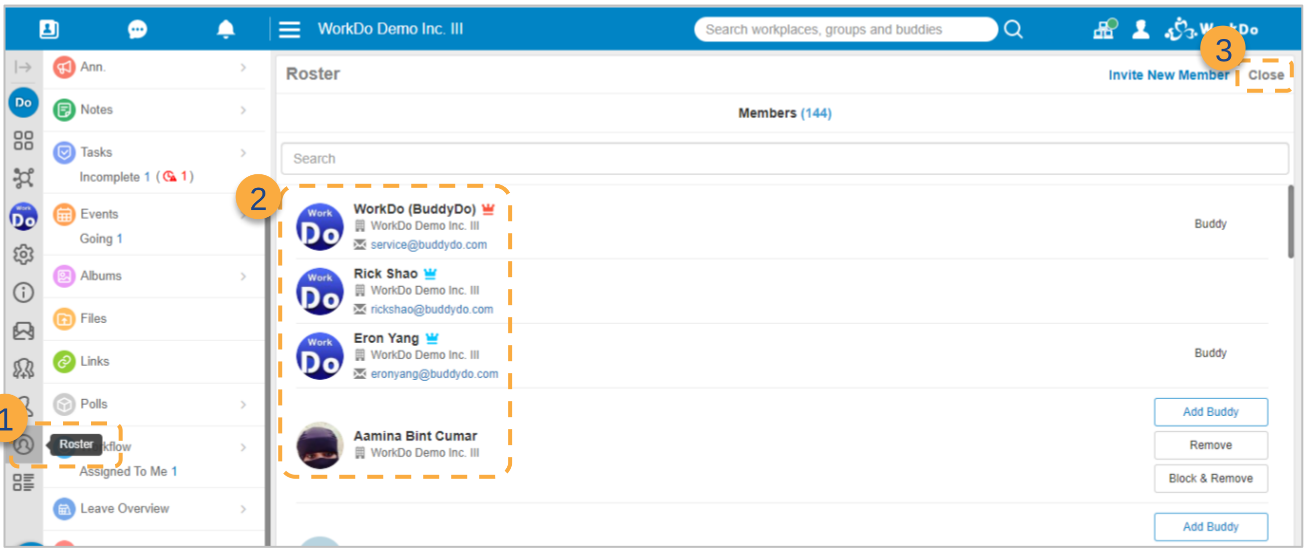
Workplace admins include the owner and multiple admins who can adjust workplace settings. Normally, the workplace admins are the management of IT employees. The tool admins control the tool settings and data. The tool activation is done by the workplace admins, and different tools could have different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

a.Assign Workplace Admins

Based on the Page Navigation, you can verify your workplace admin status by following the steps below.

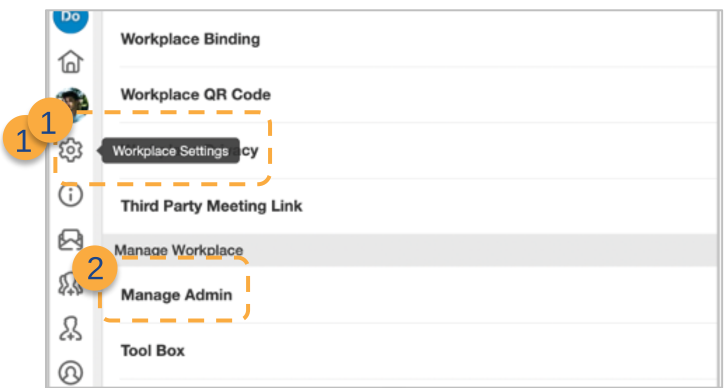


1 Click on the Roster to view all workplace admins.

2 The Workplace Owner is marked with a red crown while the workplace admins are marked with a blue crown. Owner and admins can skip to Step 1-b Tool Box.

3 Click Close to return to the Dashboard Wall.

According to Table Step 1-1, workplace admins are an integral role in maintaining all the settings in the workplace. If necessary, you will need to ask the owner or an admin to assign you the workplace admin role.



1 ▸ Click the gear icon for the Workplace Settings.

2 ▸ Manage Admin.

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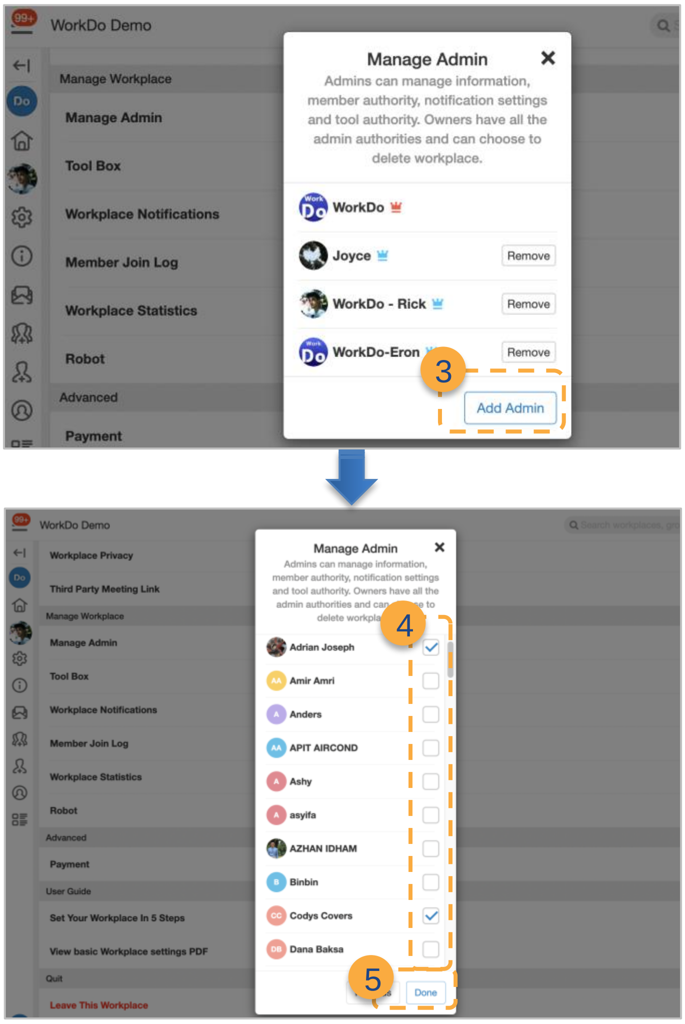


Red crown = Owner.
Blue crown = admin.

3 ▸ Add Admin.

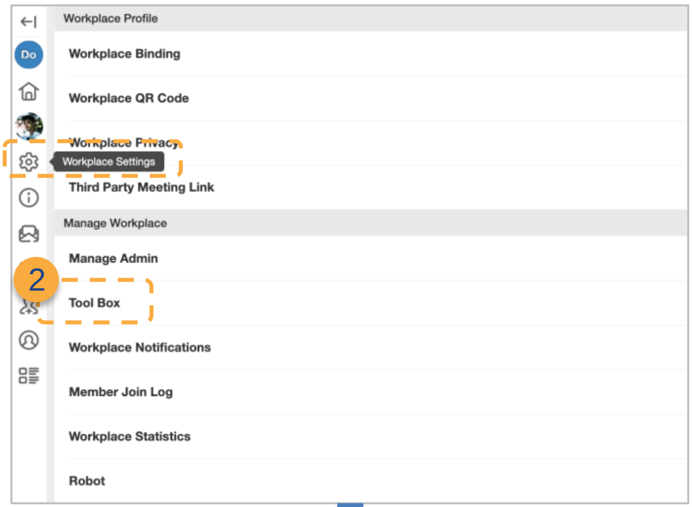
4 ▸ Member select.

5 ▸ Click Done to finish.

6 ▸ New admins will see the new options available once they refresh the browser.

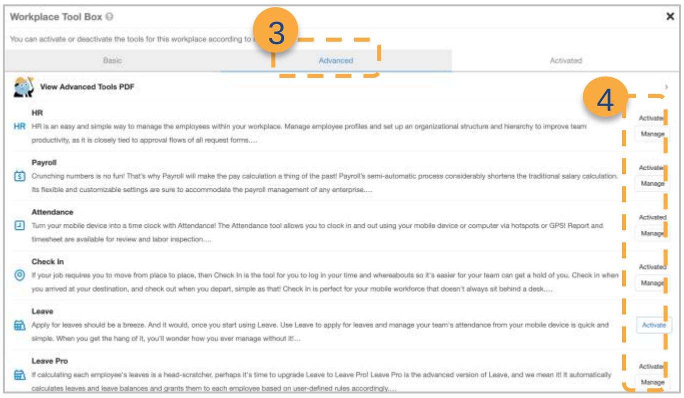
b.Tool Box

Congrats on becoming an admin, you can now go to Tool Box in workplace settings to activate or manage tools and to manage members’ tool roles, simply follow the steps below.



1 ▸ Click the gear icon for the Workplace Settings.

2 ▸ Click Tool Box.



Default is set to the Activated tool tab.

3 ▸ Click the Advanced tool tab to activate tools.

4 ▸ Click Manage to assign tool roles.

c.Set Up Tool Roles

Many advanced tools require some members to take on the administrator role to manage access to sensitive workplace information.

Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

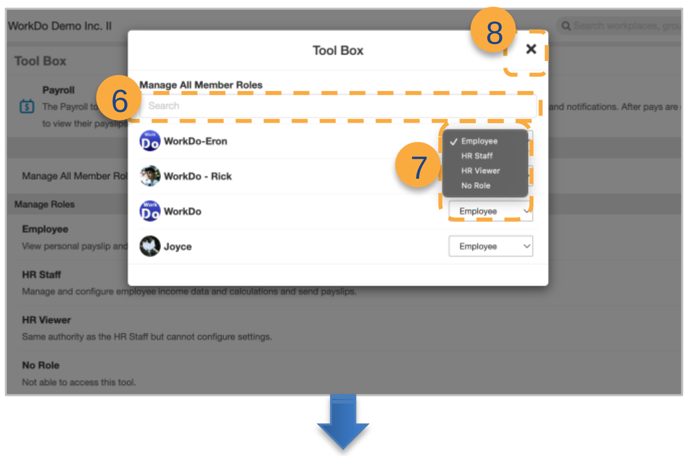
The HR tool roles are listed below.

- No Role: The HR tool is unavailable to these employees.
- Employee: These employees can view their HR information.
- HR Viewer: These employees can view all workplace members’ HR information without the ability to edit it.
- HR Staff: The HR Staff can view and edit all workplace members’ HR

information.

The workplace admins are HR Staff by default. Once HR is activated, the new members will automatically inherit the Employee role. Please ask the workplace admins to change your tool role to HR Staff so you can begin setting up HR.

Additionally, managers and dotted-line managers are responsible for signing off on various requests. They also have the authority to view the department records as seen in Step 2-b Departments and Step 2-f Manage Employee Profiles.



Following step 4, click Manage button to see tool Role and role info.

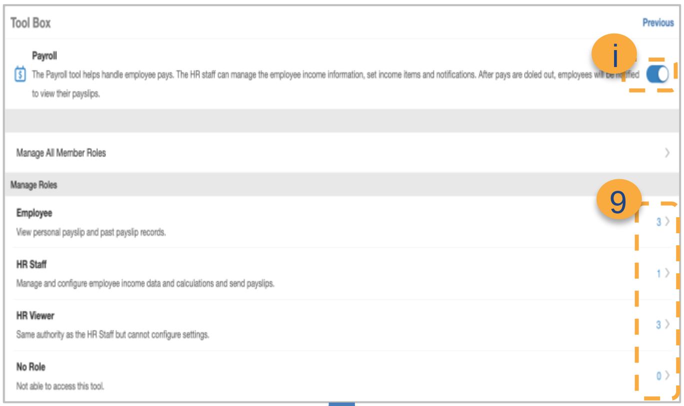
5 ▸ Change tool roles.

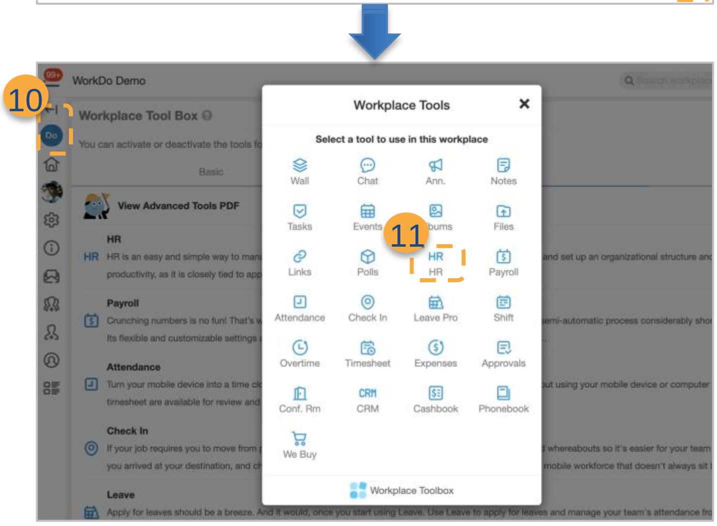
a. Click Manage All Membeccr Roles.
b. Click Employee.

6 ▸ Enter member display name in the search bar.

7 ▸ Choose a role in the drop down menu.

8 ▸ Press X to close the window.





9 ▸ Confirm member count is correct, click to for list view.

i ▸ The blue switch means the tool is activated; toggle the button to deactivate (grey).

10 ▸ Click the Do button to open up the workplace tool box.

11 ▸ Click HR.

STEP 1 a b c 2 a b c d e f g

Following the same steps above, you could also set up the tool roles of Attendance, Overtime, Leave, Leave Pro, Approvals, and Expenses.

STEP 2 . HR Set Up

Congrats on being an HR Staff! Now you may begin configuring the HR tool settings listed below. The HR tool is integral to many advanced tools; once familiar with the settings, you can customize the digital workplace to reflect how your team operates daily.

▼ Table STEP 2-1. HR Tool Setting Categories

Category	Setting	Description
User-Defined	● Companies ● Branches ● Job Titles ● Job Types ● Employment Types ● Social Media	These are all user-defined settings; most are optional except for the Employment Types.
Essentials	● System Settings ● Work Hours (Clock Time Settings) ● Departments (Company Structure) ● HR Calendar Management (Public holidays, make-up workdays) ● Employee Profiles	These settings are essential and affect how other advanced tools are used.
Shortcuts	1. Shift Schedules (Linked to Shift and Attendance) 2. Deputy Assignment (Linked to Leave Pro) 3. Approver Assignment (Linked to Expenses and Approvals) 4. Shift Manager Assignment (Linked to Shift and Attendance) 5. Projects (Linked to Timesheet) 6. FaceDo Facial Recognition Photo Library (Linked Attendance)	Settings 2, 3, 4, and 6 can also be found within the Employee Profiles.

Please follow Steps 2-a to 2-g to set up your workplace settings. There are two methods to set up the HR tool depending on how the employees join the workplace, and we will leave that decision to you!

- Batch import employee profiles and then invite employees: STEP 2-f
  A recommended method when you' d like to invite many employees at once.
- Invite employees and then edit their profiles: STEP 2-g individually
  When an employee joins the workplace, an employee profile is created, which can be edited by the HR Staff.

STEP 2
Setup
Process

a. System Settings
Affect many advanced tools and the overall workplace setting.

b. Work Hours
Affect how work hours are calculated.

c. Departments
Set how request workflow works.

d. Employment Types
Affect the employee eligibility in Leave Pro & Overtime.

e. HR Calendar Management
Determine workdays, public holidays, etc.

f. Import Employee Profiles
Batch-invite employees to the workplace.

g. Employee Profiles
Automatically created when employees join.
Affect how most advanced tools are used.

▲ Image STEP 2-2. HR Setup Process

a.System Settings

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	**Interface**	● Web ○ App
Data	Attendance, Leave, Leave Pro, Overtime, Expenses & Approvals		

Integration	
Requirement	● Mandatory ○ Optional
Key Settings	1. HR: Notification Settings. 2. Attendance: Determine whether new employees are required to clock in/out. 3. Approvals: Determine the request workflow (Image 2-a).

Employees	First-line Managers Employee Profiles	Escalate - second, third-line managers System Settings
Employee A	Employee Profile of A First-line Manager Dotted-line Manager	System Settings: Upper Management Upper management for approval or System Settings: First-line Manager Employee Profile of A

▲ Image STEP 2-a. Approval Escalation Rule

Field	Description	Note
Attendance > New Members Required to Clock?	The default is set to Yes, and it is not retroactive. • Yes: Newly onboarded employees need to clock in/out. • No: Newly onboarded employees do not need to clock in/out.	Please refer to the Attendance Tool Manual for detailed setting instructions.
Approvals > Approval Escalation Rule	Determines the approval workflow of all the request forms. • Escalate to the next department supervisor in the hierarchy. • Escalate to employee' s supervisor.	Refer to Image STEP 2-a.
Notification Settings > Probation, contract	The default is set to No. • Yes: Set advanced notices (Days) for the HR Staff and the employees.	• Email and system notifications. • Contracts and

Field	Description	Note
& agreement expiration notifications	• No: Advanced notices are not required.	agreements are set in the Employee Profiles.
Employee Info Display Rules > Personal emails, mobile numbers, personal numbers.	• HR Staff and HR Viewers: Viewable only to members of either of the two roles. • No one: Not viewable to anyone. • All members: Viewable to all workplace members.	The employee info is viewable in Workplace > Roster and HR > Colleagues.

1 Click System Settings.

2 Verify whether the default settings are applicable.

3 Click the Edit button the change the settings.

4 Click Save to finish.

b.Work Hours

WorkDo offers two types of work schedules, fixed work hours for your full-time employees and shift schedules for your shift employees.

- **Fixed Work Hours:** Fixed work hours are for employees who work on a fixed schedule. They clock in/out based on the set times and can apply for leaves and overtime work.

- **Shift Schedule:** Shift schedules are for rotating shift employees. The shift schedules are set in either the HR or the Shift tool, and you can refer to Step 3-a for details.

Fixed Work Hours

- Set multiple fixed work hours.
- Each set contains its own workdays and non-workdays.

Attendance	Clock in/out, lateness
Leave Pro	Apply leaves on workdays
Overtime	Apply for overtime work

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ● App
Data Integration	Attendance, Leave Pro, Overtime		
Requirement	● Mandatory ○ Optional		
Key Settings	1. When the HR tool is activated, so do the default work hours. The work hours can be edited but not deleted. 2. The HR Staff can set multiple work hours for different types of employees. 3. Set breaks for employees; break time does not count toward the total work hours. 4. Set flexible work time when the Attendance tool is enabled.		

5. Each employee must fit with a set of work hours to calculate their total work hours.

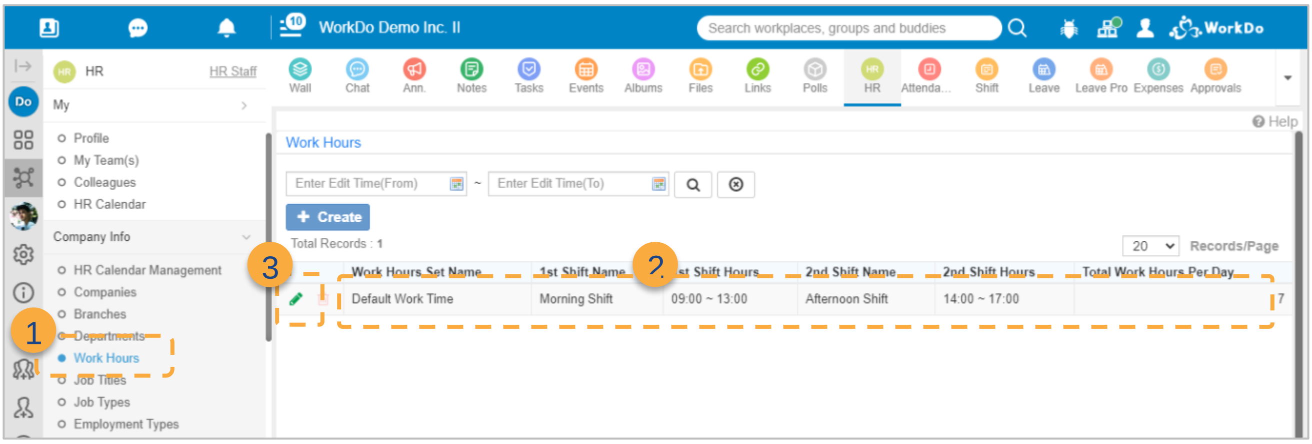
Field	Description	Note
Work Hours		
Work Hours Name	Fill out a name for the work hours.	
1st Shift	Select an applicable option.	
1st Shift Hours	● Enter the shift start and end time. The time affects the clock in time and the total work hours. ● The 1st shift end time can be early or equal to the 2nd shift start time. If it is earlier than the 2nd shift start time, the time between the two shifts is considered the break time.	
1st Break Time	● Optional ● Breaks do not count toward the total work hours.	Break time must fall within the shift hours.
2nd Shift	Select an applicable option.	
2nd Shift Hours	● Enter the shift start and end time. The time affects the clock in time and the total work hours. ● The 2nd shift start time can be equal or later than the 1st shift end time. If it is later than the 1st shift end time, the time between the two shifts is considered the break time.	
2nd Break Time	● Optional ● Breaks do not count toward the total work hours.	Break time must fall within the shift hours.
Daily Total Work Hours	The daily total work hours are the sum of both shifts minus the breaks.	The daily total work hours can be the

STEP 1 a b c 2 a b c d e f g √

Field	Description	Note
		daily limit for the Timesheet tool if you wish.
Workdays	Set weekly workdays and day offs. ● Workdays determine how work hours are calculated and when to clock in/out. ● Day offs and rest days will integrate with the Overtime and Payroll tools in the future.	
Clock Time Settings		
Clock Frequency	Select an applicable option.	
Earliest Clock In Time	The earliest time that employees can start clocking in for the day.	
Flexible Work Start Time	Clocking in after this time will be marked as late.	
Flexible Work End Time	Clocking out before this time will be marked as early leave.	
Latest Clock Out Time	The latest time that employees can clock out for the day.	
Department / Employee	● Select applicable departments or employees that use this set of work hours.	

- **Workplace that only uses one set of work hours**

  When HR is enabled, the default work hours apply to all employees. You can modify the time, but you cannot rename or delete it. Follow the steps listed to change the work hours.


WorkDo Demo Inc. II
Search workplaces, groups and buddies
WorkDo
Wall Chat Ann. Notes Tasks Events Albums Files Links Polls HR Attenda... Shift Leave Leave Pro Expenses Approvals
HR
HR Staff
My
Profile
My Team(s)
Colleagues
HR Calendar
Company Info
HR Calendar Management
Companies
Branches
Departments
Work Hours
Job Titles
Job Types
Employment Types
Help
Work Hours
Enter Edit Time(From)
Enter Edit Time(To)
+ Create
Total Records : 1
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Work Hours Set Name
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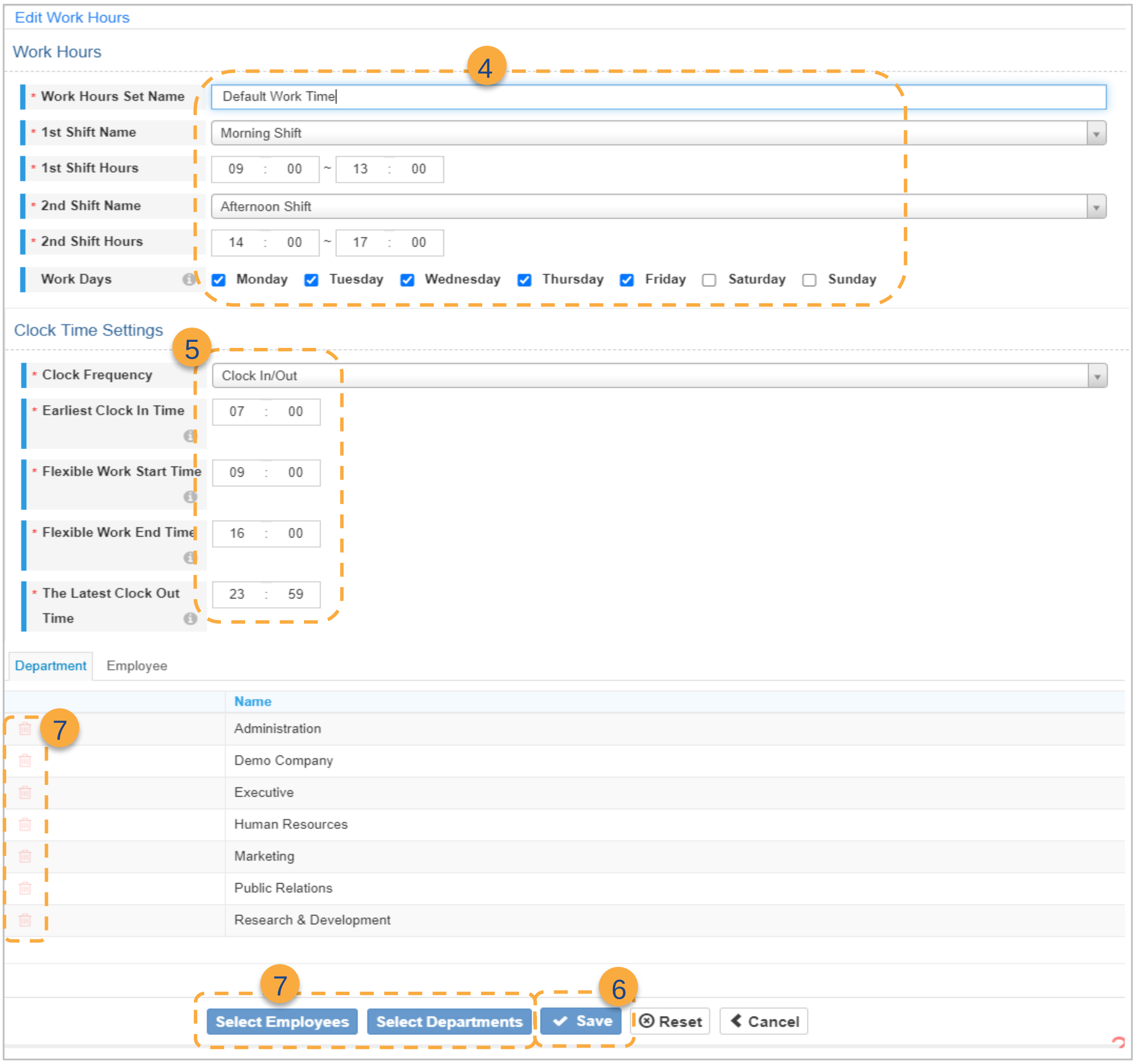
Edit Work Hours
Work Hours
* Work Hours Set Name
Default Work Time
* 1st Shift Name
Morning Shift
* 1st Shift Hours
09 : 00 ~ 13 : 00
* 2nd Shift Name
Afternoon Shift
* 2nd Shift Hours
14 : 00 ~ 17 : 00
Work Days
Monday Tuesday Wednesday Thursday Friday Saturday Sunday
Clock Time Settings
* Clock Frequency
Clock In/Out
* Earliest Clock In Time
07 : 00
* Flexible Work Start Time
09 : 00
* Flexible Work End Time
16 : 00
* The Latest Clock Out Time
23 : 59
Department
Employee
Name
Administration
Demo Company
Executive
Human Resources
Marketing
Public Relations
Research & Development
Select Employees
Select Departments
Save
Reset
Cancel
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Edit Work Hours

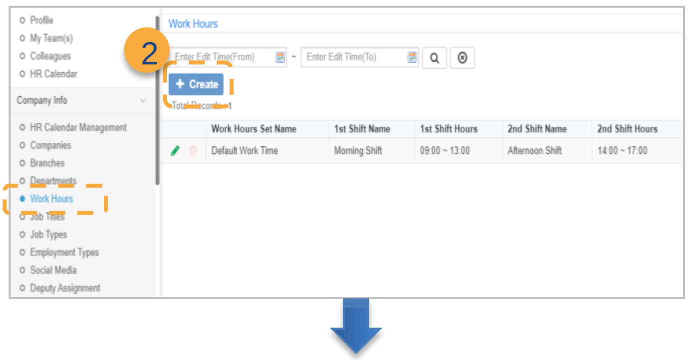
1. Click Work Hours.
2. Click for detailed view
3. Click the Edit icon.
4. Input the required work hours information.
5. Input the Clock Time Settings for employees who are required to clock in/out.
6. Click Save to finish.

Applicable Departments/Employees

7. Resume from Step 4 and select employees or departments that will use this work time.
   - Select applicable employees and departments then click the Save button to finish.
   - Click the Trash Can icon to remove employees and departments.

- **Workplace that uses multiple sets of work hours**

  Follow the steps below if your workplace requires multiple work hours for different departments or employees.



New Work Hours

1. Click Work Hours.
2. Click Create.

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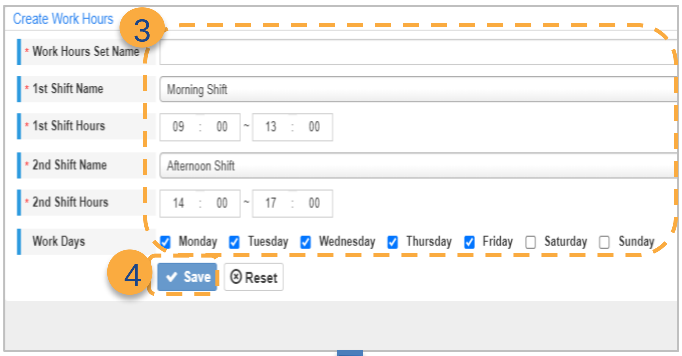
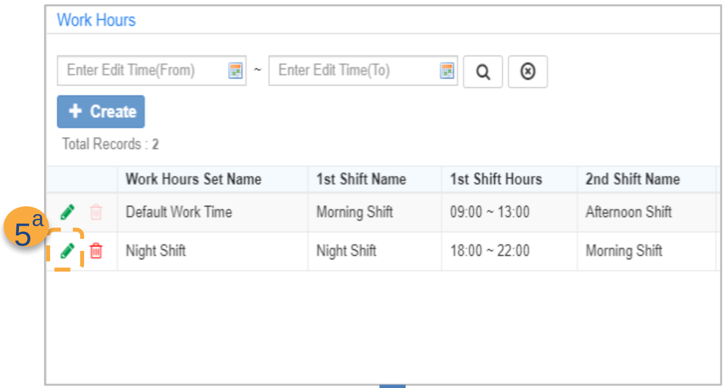


▸ 3 Enter work hours.

▸ 4 Click save to complete.



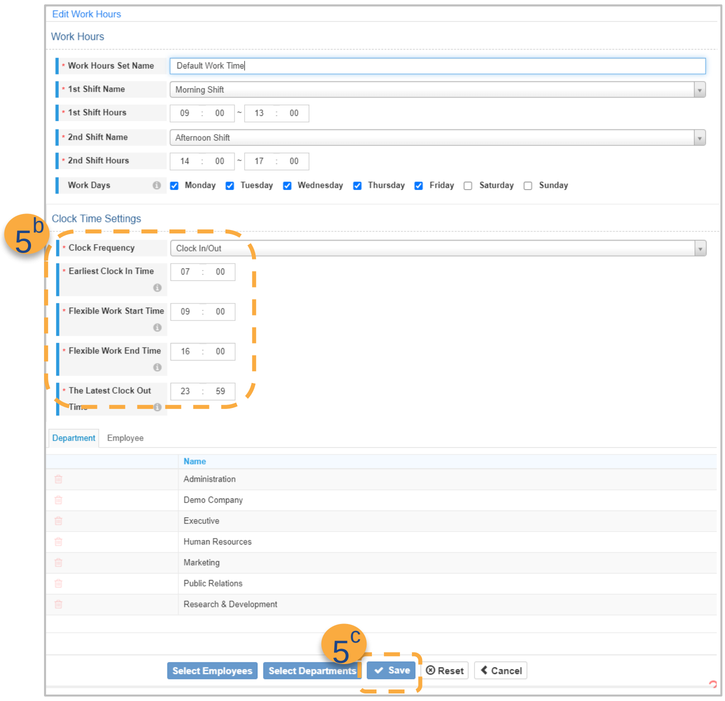
Continue if the Attendance tool has been activated, else, skip to Step 2-c.

▸ 5 Edit Clock Time Settings

a. Click the Edit button.

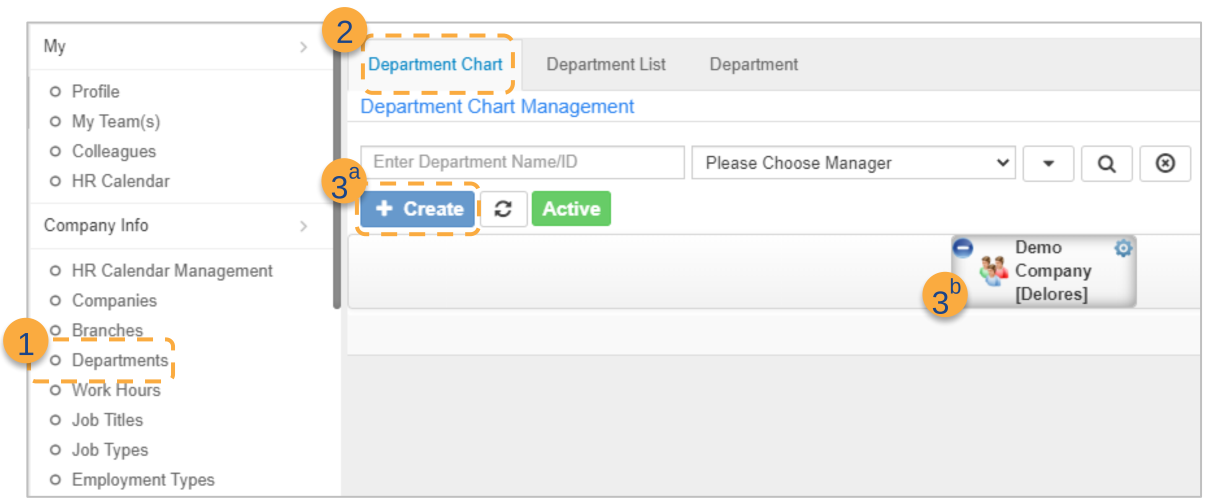
b. Fill out the clock times.

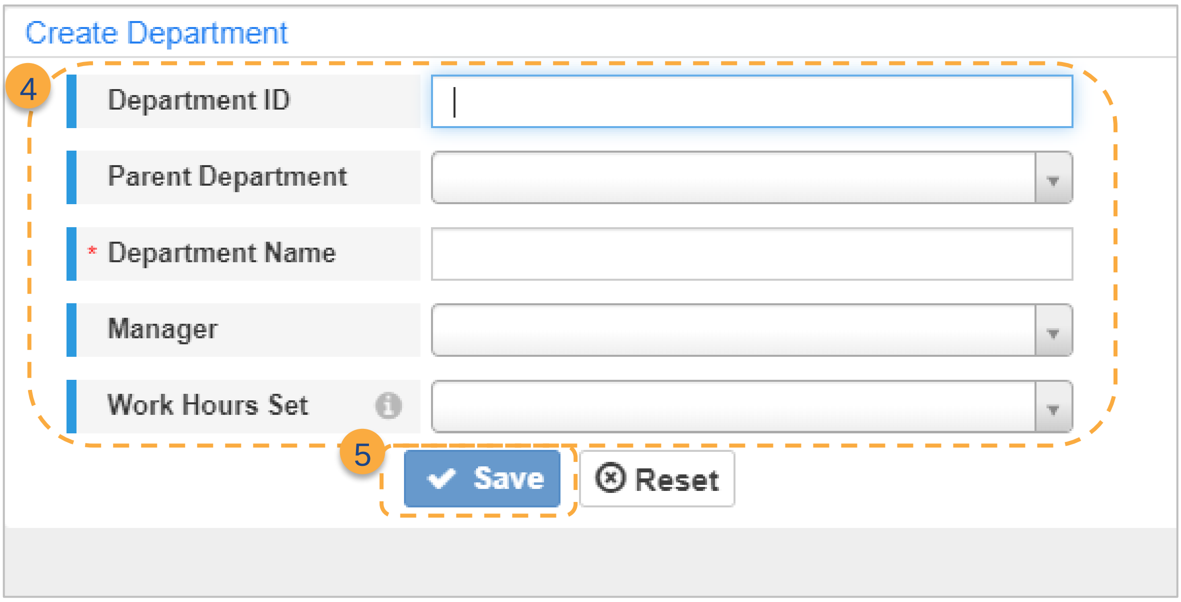
c. Click Save to finish.

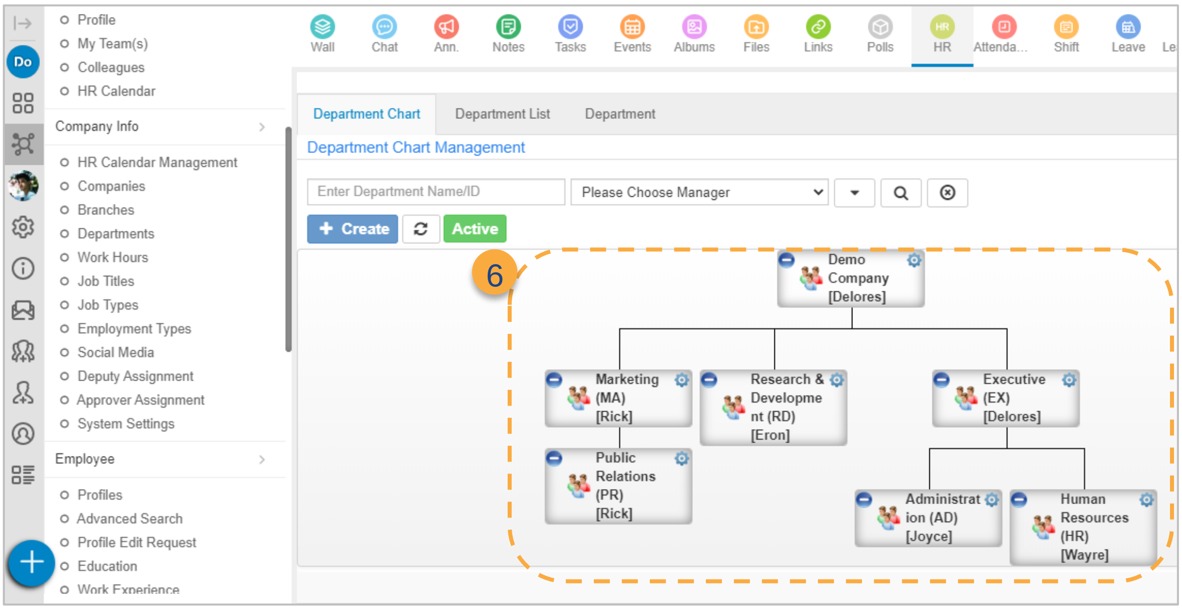


c.Departments

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ● App (Partial)
Data Integration	Attendance, Check In, Leave, Leave Pro, Shift, Overtime, Expenses, Approvals		
Requirement	● Mandatory ○ Optional		
Key Settings	Set company hierarchy and request workflow. 1. Edit using department chart, list, and hierarchy. 2. Create and edit departments and company structure. 3. Edit department information.		
Timings	1. Create new departments, structure updates, and manager changes. 2. Specify fixed work hours for the department and the leave type eligibility of the department employees.		







1 Click Departments.

2 Click the Department Chart tab.

3 Choose a or b.

a. Click the +Create button.

b. Click the + button [1] to add a child department.

4 Fill out the department information (* Must be filled).

5 Click Save to finish.

6 Return to the last page to verify the settings.

[1] For Step 3b, the parent department is the department you click the + button.

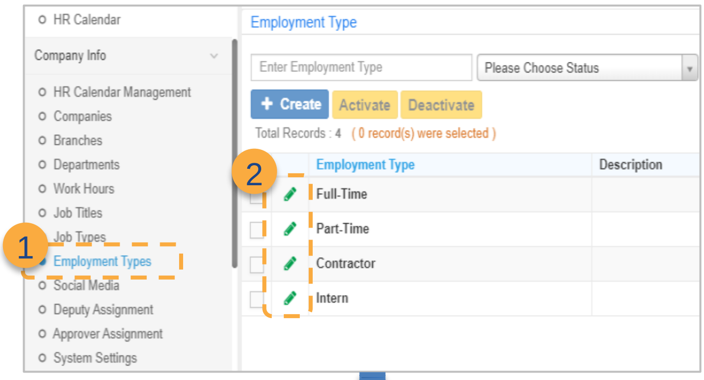
When setting up your organizational structure, the Manager drop-down box is optional. However, once you enable tools like Approvals and Expenses that require managers to sign off on employee requests, you must declare a manager for each department.

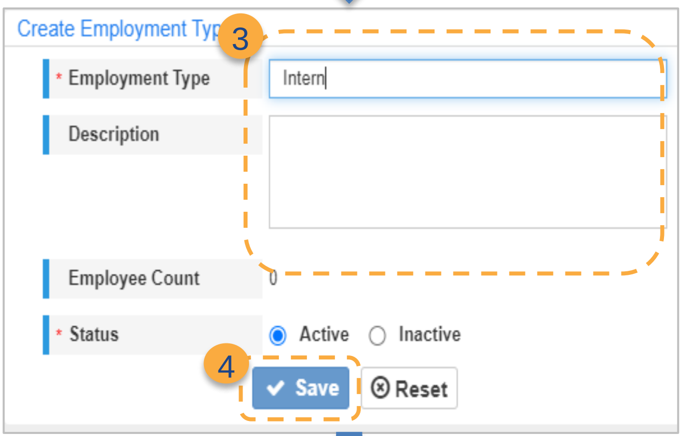
STEP 1 a b c 2 a b c d e f g √

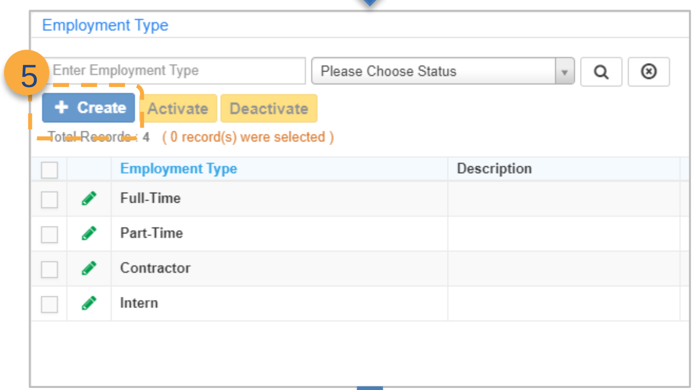
d.Employment Types

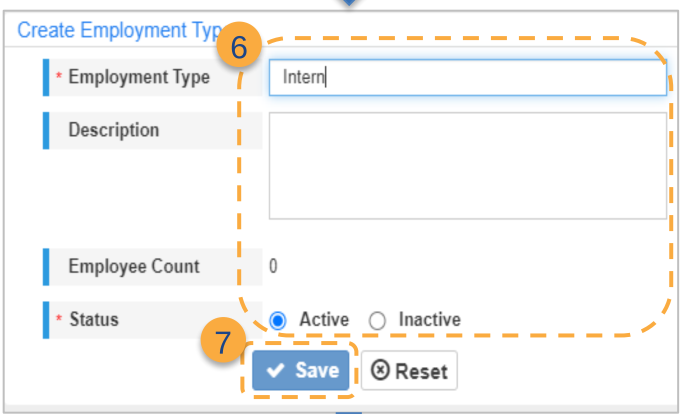
Employment Types are essential in the Employee Profiles. They affect what kind of leaves the employees are entitled to in Leave Pro and whether they are allowed to apply for overtime compensations in Overtime.

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ○ App
Data Integration	Leave Pro, Overtime		
Requirement	● Mandatory ○ Optional		
Key Settings	1. There are three default employment types, and the HR Staff can adjust them to fit the workplace accordingly. 2. Activate, deactivate, or create new employment types; the changes are retroactively updated in the employee profiles. 3. Easily verify employees with each employment type.		
Timing	Change employees' employment types.		









Edit Employment Types

1. ▸ Click Employment Types.

2. ▸ Click the Edit icon to change the Employment Types.

3. ▸ Fill out the description for an employment type if necessary.

4. ▸ Click Save to finish.

Create New Employment Types

5. ▸ Click + Create to create more employment types.

6. ▸ Enter the information and set the Status to Active.

7. ▸ Click Save to finish.

STEP
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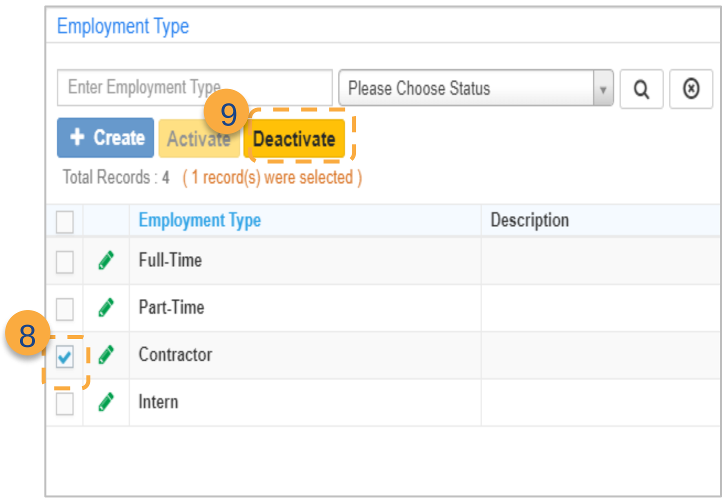


Activate / Deactivate

8 ▸ Use the check box to select the employment types.

9 ▸ Click the Activate or Deactivate button.

e.HR Calendar Management

The HR calendar is crucial to the entire organization and is tied to Leave Pro, Overtime, and Attendance. When the HR Staff has adequately set the public holidays and special occasions, employees will not be asked to clock in/out and apply for leaves on those days. Of course, different departments could use different calendars.

When the HR tool is activated, the system will create a default HR calendar that will apply to all members. And if you need a different HR calendar for other departments or members, please follow the steps below to create a new HR calendar.

- **Track Employee Attendance**
  An HR Calendar consists of workdays, off days, public holidays, etc. Coupled with Attendance, Leave Pro, and Overtime tools, you now have the perfect employee attendance tracker.
  - Company Event
    Display purpose only does not affect employee attendance.
  - Working Day
    Employees need to clock in and clock out on working days, and absences must apply for leaves. Overtime applications are allowed outside of the scheduled work hours.
  - Public Holiday
    Public holidays are non-working days. Employees do not need to come to work, and overtime applications are allowed.

- **Different HR Calendars for Different Teams**
  HR Staff could create multiple HR calendars to manage teams in different regions or branches.
- **An HR Calendar for Every Employee**
  To accurately track employee attendance, every employee is fixed to one HR calendar, and they can check their calendar for any scheduled events.

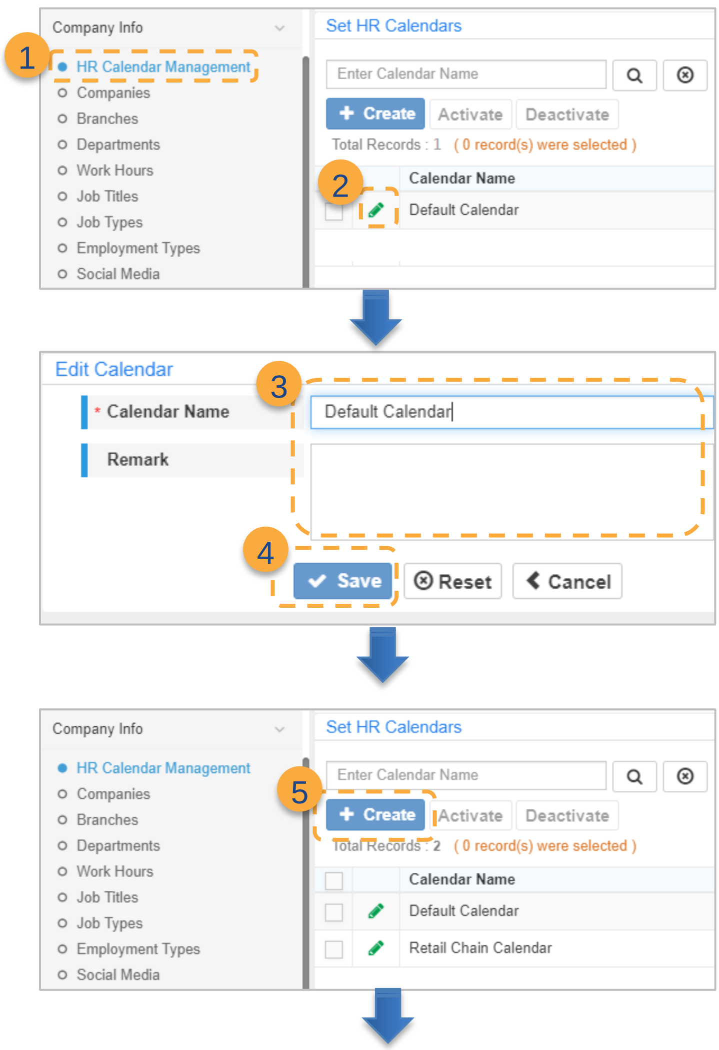
Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ● App
Data Integration	Attendance, Overtime, Leave Pro		
Requirement	● Mandatory ○ Optional		
Key Settings	1. A default HR calendar is available when the HR tool is activated, and the HR Staff can edit the calendar events as desired. 2. Create multiple HR calendars for branch offices or teams. 3. Each employee is fixed to one HR calendar.		
Timings	1. Schedule holidays, make-up workdays, and non-workdays. 2. You can set a public holiday for weather-related cancellations [2]. In doing so, employees will not require to take leaves and clock in/out.		

STEP 1 a b c 2 a b c d e f g √

Field	Description	Note
HR Calendar Management	• Create multiple HR calendars as needed. • Events created in the HR calendar(s) will directly affect employees' attendance.	
Calendar Name	For display purposes only.	
Remark	For display purposes only.	
Calendar Management	Schedule non-working days and company events.	Select an HR calendar to enter

[2] Alternatively, you can create a new leave type in Leave Pro for weather-related cancellations and ask the employees to apply for leaves.

Field	Description	Note
		into the calendar management page.
Event Name	Set a holiday or event name.	
Event Type	The event type will affect employees' attendance.	
Related Event	This option becomes available when you have chosen the Make-up Workday and Compensatory Time. The field is optional and for display purposes only.	
Event Start Date	Schedule a date and time.	
HR Remark	For display purposes only.	



Edit HR Calendar

1 ▸ Click HR Calendar Management.

2 ▸ Use the Edit icon to change the calendar name.

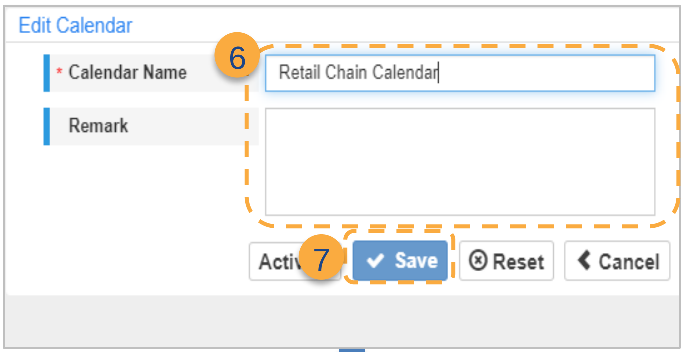
3 ▸ Write a note or remark as needed.

4 ▸ Click Save to finish.

Add a New HR Calendar

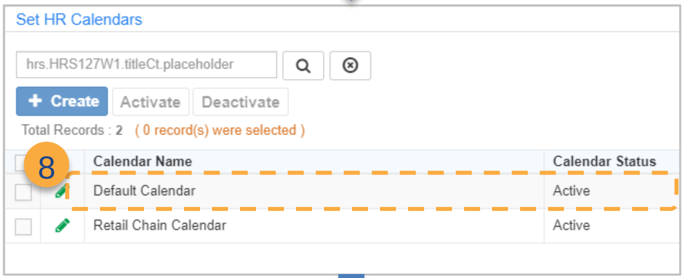
(Skip to Step 8 if not required)

5 ▸ Click + Create to add a new HR calendar.



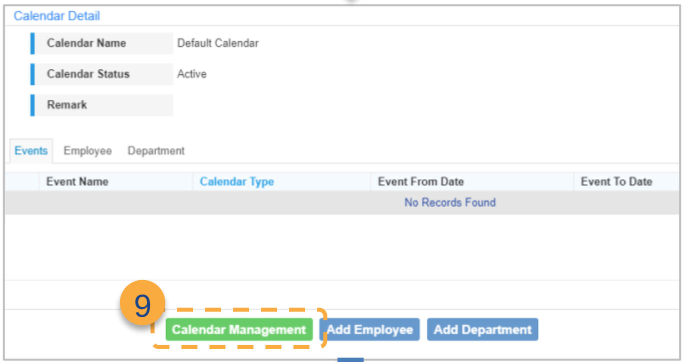
6 ▸ Fill out the calendar name and remark.

7 ▸ Click Save to finish. Repeat Step 5 – 7 until you are done.

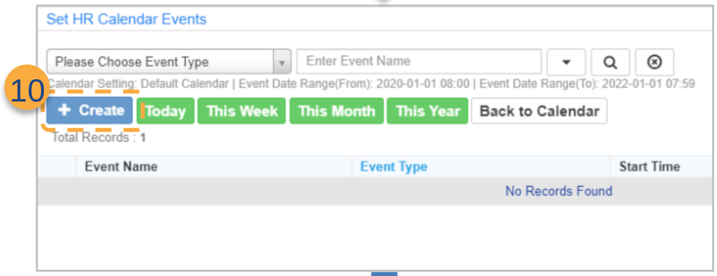


Schedule Events

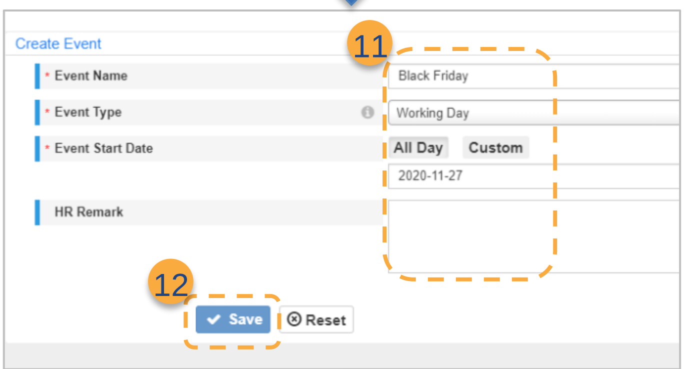
8 ▸ Select a calendar to add events.



9 ▸ Click Calendar Management.

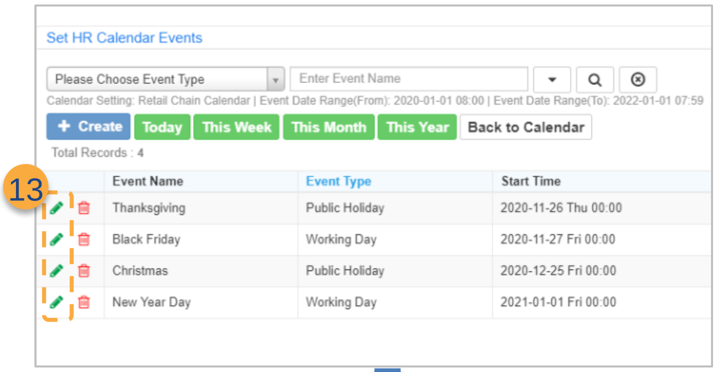


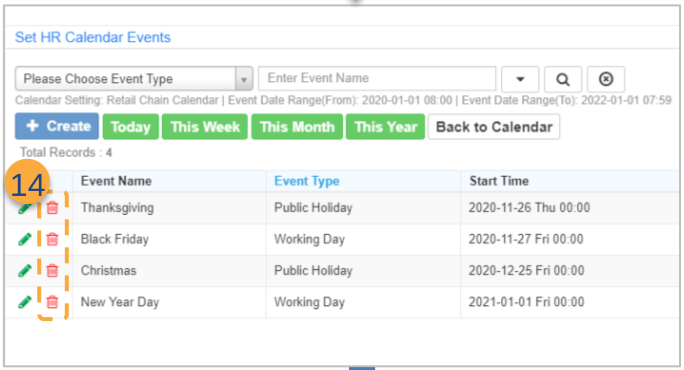
10 ▸ Click + Create to add an event.

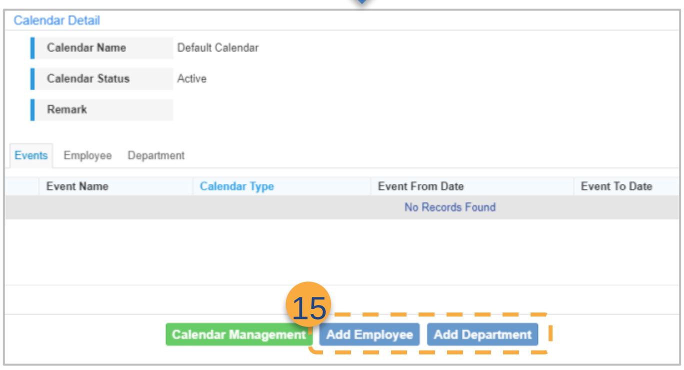


11 ▸ Fill out the event name, type, date. Additional information can be added in the Remark section.

12 ▸ Click Save to finish.







Edit Events

13 ▸ Click the Edit icon and repeat Step 11 & 12 to edit events.

Delete Events

14 ▸ Click the Trash Can icon to delete events.

Add Employees

15 ▸ When workdays, holidays, and events are scheduled, add employees or departments that are using this HR calendar.

Changing the events in an HR calendar or the HR calendar employees use, attendance records, leave applications, and overtime applications are also affected.

f.Import Employee Profiles

Employee Profiles are crucial to how employees join the workplace and how they use advanced tools; HR Staff can either edit the profiles individually or use the provided template to edit them as detailed below.

▼ Table STEP 2-f. Employee Profiles Options

	Template → Invite Employees → Profiles Created → Edit Profiles STEP 2-f is recommended	Employees Join Workplace → Profiles Created → Edit Profiles STEP 2-g is recommended
Key Point	Download the template and fill out key information about the employees to invite them to the workplace.	After employees have joined the workplace, you can edit their entire employee profile as detailed in STEP 2-g.
Features	● The template contains all the workplace employees' profiles at the time. ● Help employees join the workplace using their emails and mobile numbers. Their emails and mobile numbers are bound to their accounts to avoid duplicate employee profiles.	● Once employees have joined the workplace, their employee profiles are created and bound to their accounts. HR Staff can edit their detailed information in their profiles later. ● HR Staff can manually create employee profiles and then bind them to employees.
Timing	• When you need to invite many employees to the workplace. • Update partial information on many employees.	• When your workplace has a small number of employees. • When employees are joining sporadically. • Update a single employee's profile.
Difference	Update partial employee profile information only.	The complete and well-rounded employee profile page.

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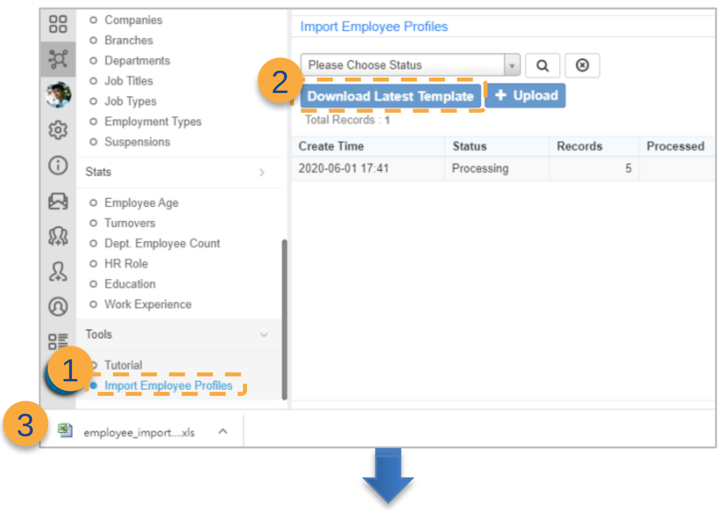
Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ○ App
Data Integration	Payroll, Attendance, Check In, Leave, Leave Pro, Shift, Overtime, Timesheet, Expenses, Approvals		
Requirement	● Mandatory ○ Optional		
Key Setting	As described in Table STEP 2-f.		

A system check is in place to avoid errors before the final import, as seen in the image below.

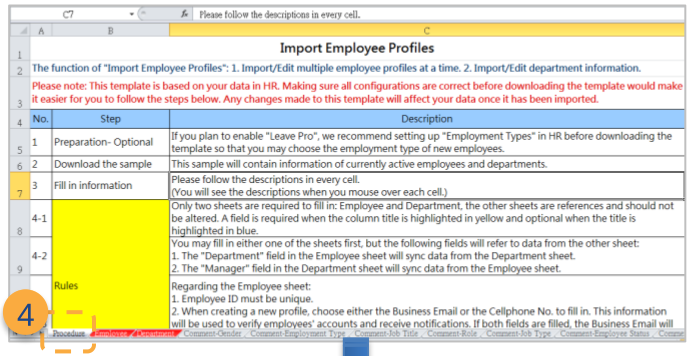
Import Employee Profiles	Upload Profiles	Import Profiles
Download Latest Template Fill out and save	+Upload System check	Import System auto invites employees via their emails and mobile numbers

▲ Image STEP 2-f. Import Employee Profile Procedure

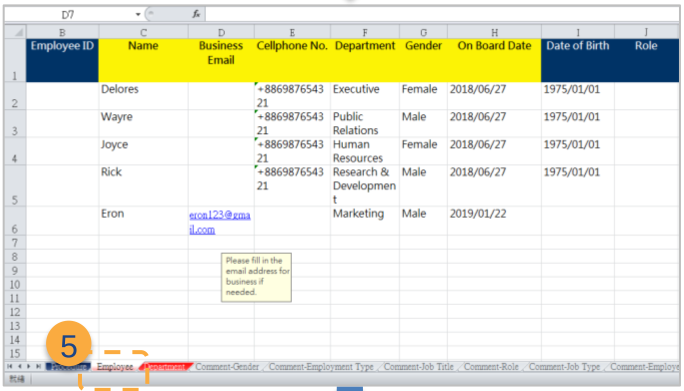
Now follow the steps below to import employee profiles.



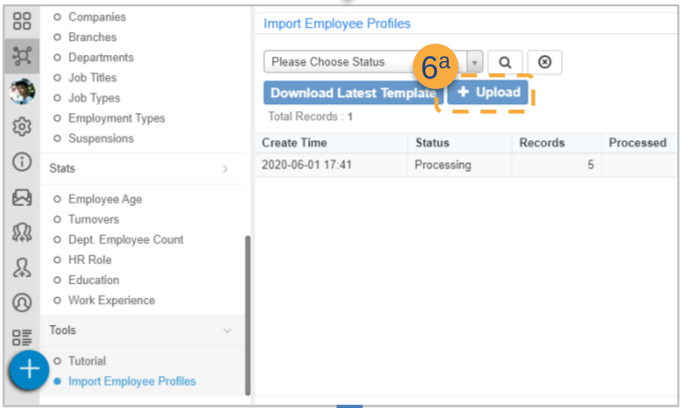
1. ▸ Click Import Employee Profiles.
2. ▸ Download Latest Template.
3. ▸ Open the file.



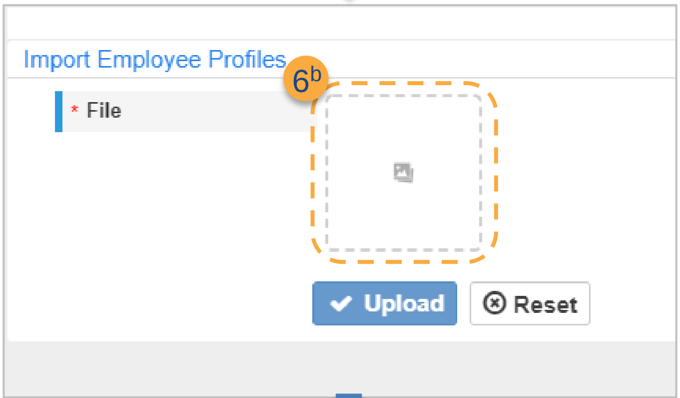
4 ▸ Please carefully read the description on how to correctly fill out the information fields.



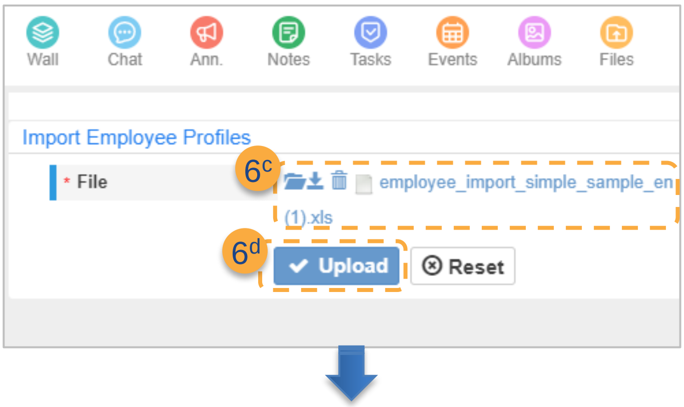
5 ▸ Click the Employee tab and fill in the information as instructed. The file name can be edited.



6a ▸ Click + Upload.

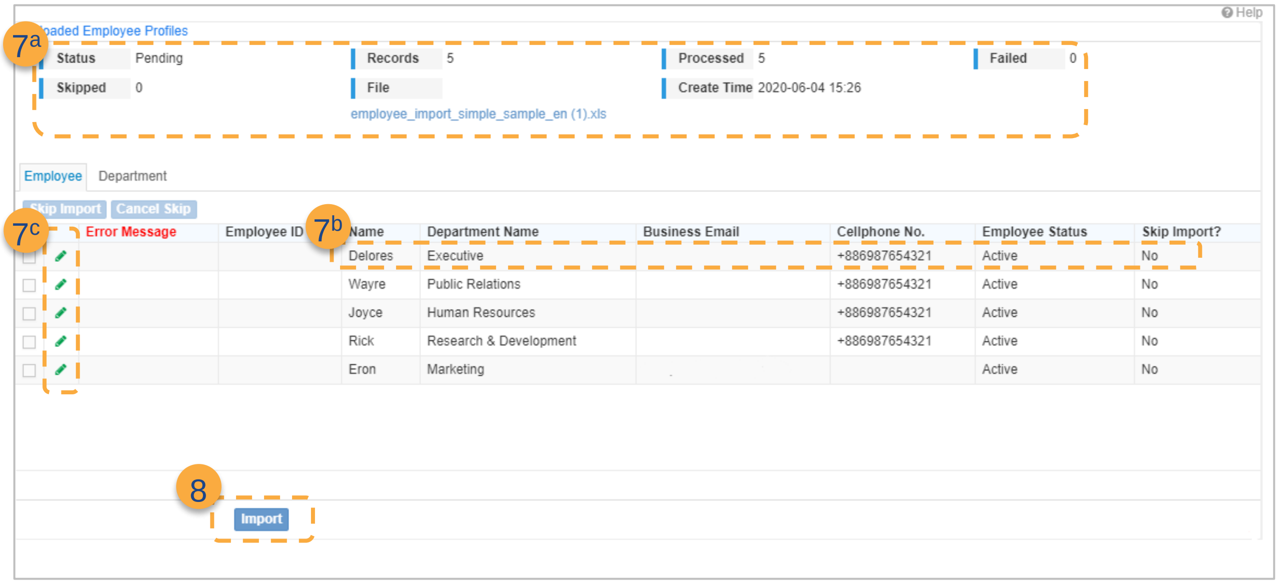


6b ▸ Select the file for upload.



6c ▸ Make sure the correct file is selected.

6d ▸ Click Upload.



7 ▸ Check the data uploaded.

a. Is the number of profiles correct?

b. Click to enter a detailed view.

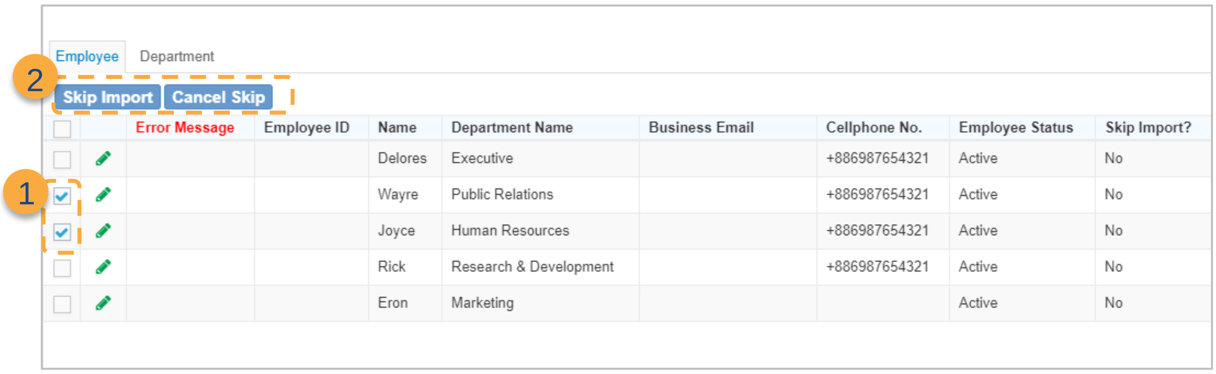
c. Click the Edit icon to edit information as needed.

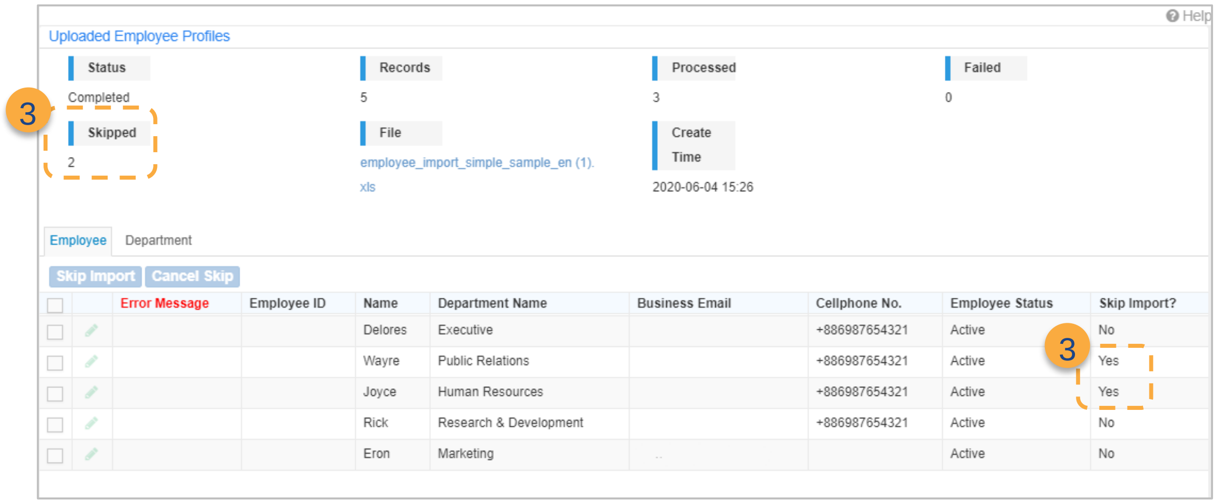
8 ▸ Click the Import button and wait for the success message. Once finished, the system will send invites to the employees.

Please follow the instructions to troubleshoot data errors or omit certain profiles from importing.

- **Omit Employee Profiles from Importing**

  Existing members' profiles do not need to import again.





1 ▸ Use the check boxes to select the profiles.

2 ▸ Skip Import or Cancel Skip.

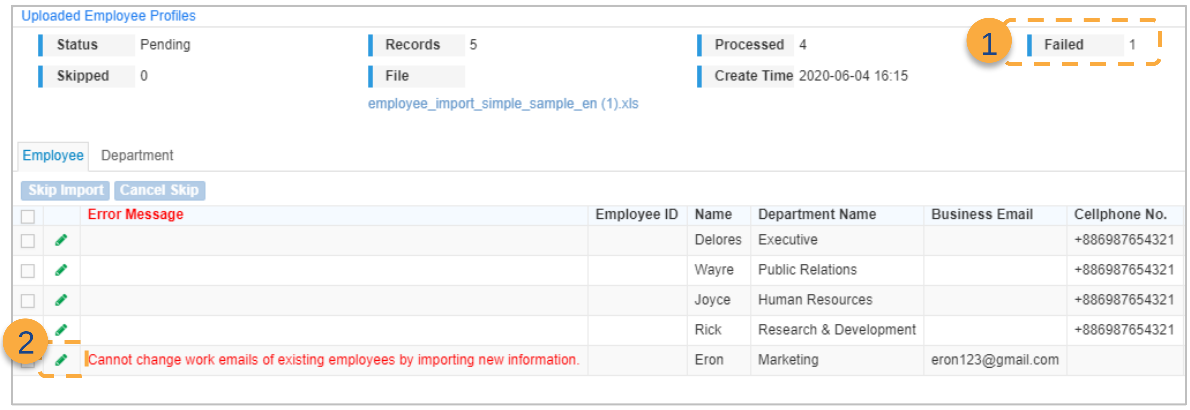
a. Click Skip Import for existing profiles, the import function will not import these profiles.

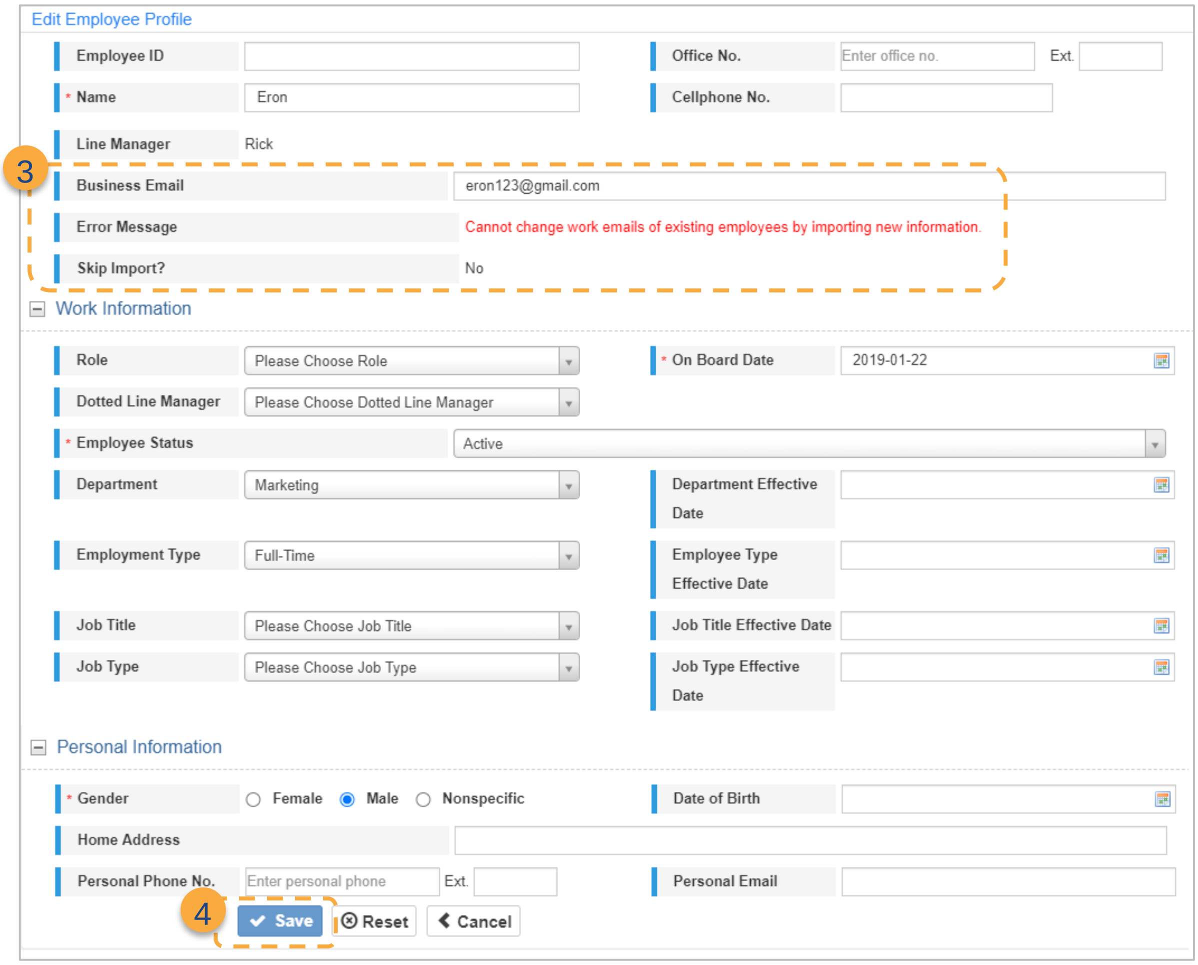
b. Click Cancel Skip to undo Skip Import.

3 ▸ Skipped profiles will be displayed after the import. If you wish to import the skipped profiles, please resume from step 1 of this section.

- **Data Error**

  The system will display the reason for the data error. Should this occur, you could correct the data in the template and re-upload or use the Edit icon and make the correction on the profile page.





1. ▸ Invalid and duplicate profiles will be displayed.
2. ▸ Click the Edit icon to edit the profiles.
3. ▸ Correct the erroneous data.
4. ▸ Click Save, return to the import page and import the profiles.

g.Employee Profiles

Employee profiles are integral in WorkDo; the profile settings determine which tools are available to them and how they are used. Please read the description and refer to the table below to fill out the employee profiles (*Must be filled).

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ● App (Partial)
Data Integration	Payroll, Attendance, Check In, Leave, Leave Pro, Shift, Overtime, Timesheet, Expenses, Approvals		
Requirement	● Mandatory ○ Optional		
Key Settings	1. Search, create, edit, and delete employee profiles. 2. Update employees' department, work schedule, and employment status. 3. Account binding for employees.		
Notices	1. A profile is created when employees join a workplace, and their account is bound to their profiles. 2. HR Staff could create profiles beforehand, then manually bind them to employees when they join the workplace. 3. HR Staff should remove members from the workplace when they resign, and their employment status will change to terminated. (Workplace Settings >Roster > member select > Manage Member > Remove from the Workplace) By doing so, the workplace will not be charged for this member's cost next month.		

Field	Description	Note
*Employee ID	Format unrestricted.	Required for Payroll.
*1st & 2nd Deputy	- Set deputies so they would be notified when the employee takes leave. - If Check Deputy Status is Yes in a leave type of Leave Pro, the employee and	Email notification is sent to the Business Email listed in the employee profile.

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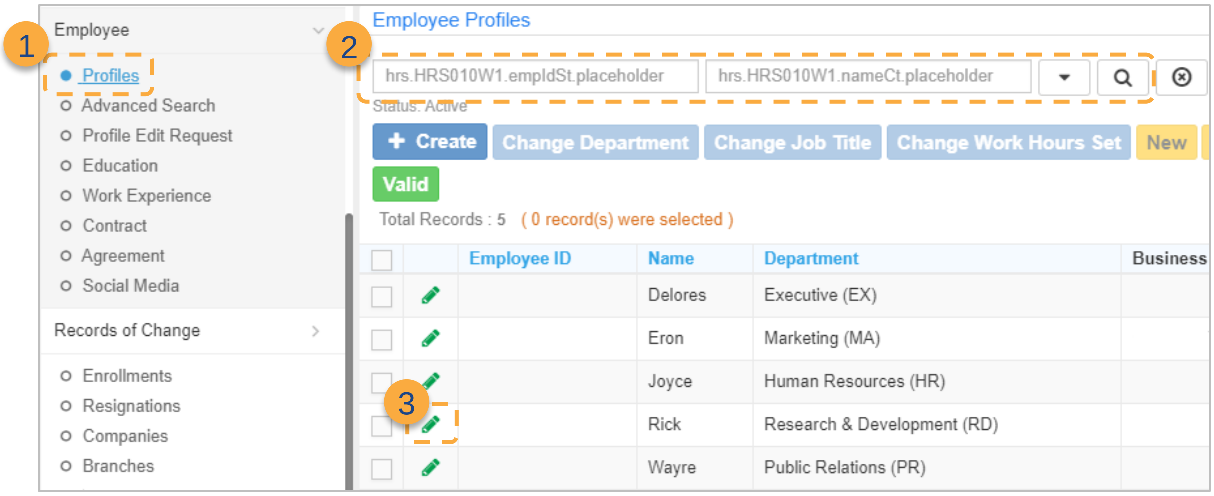
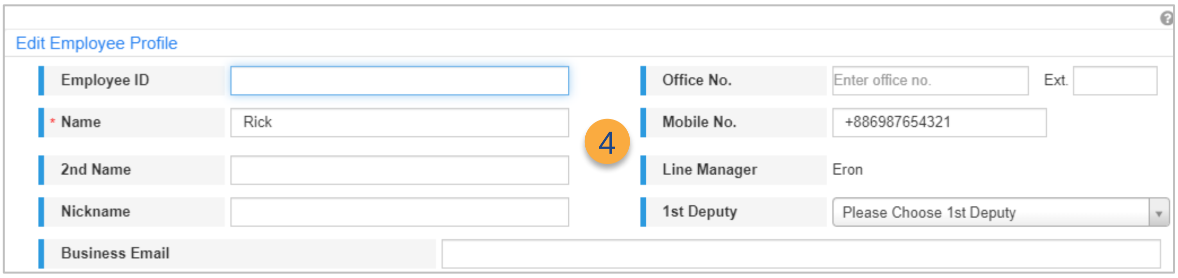
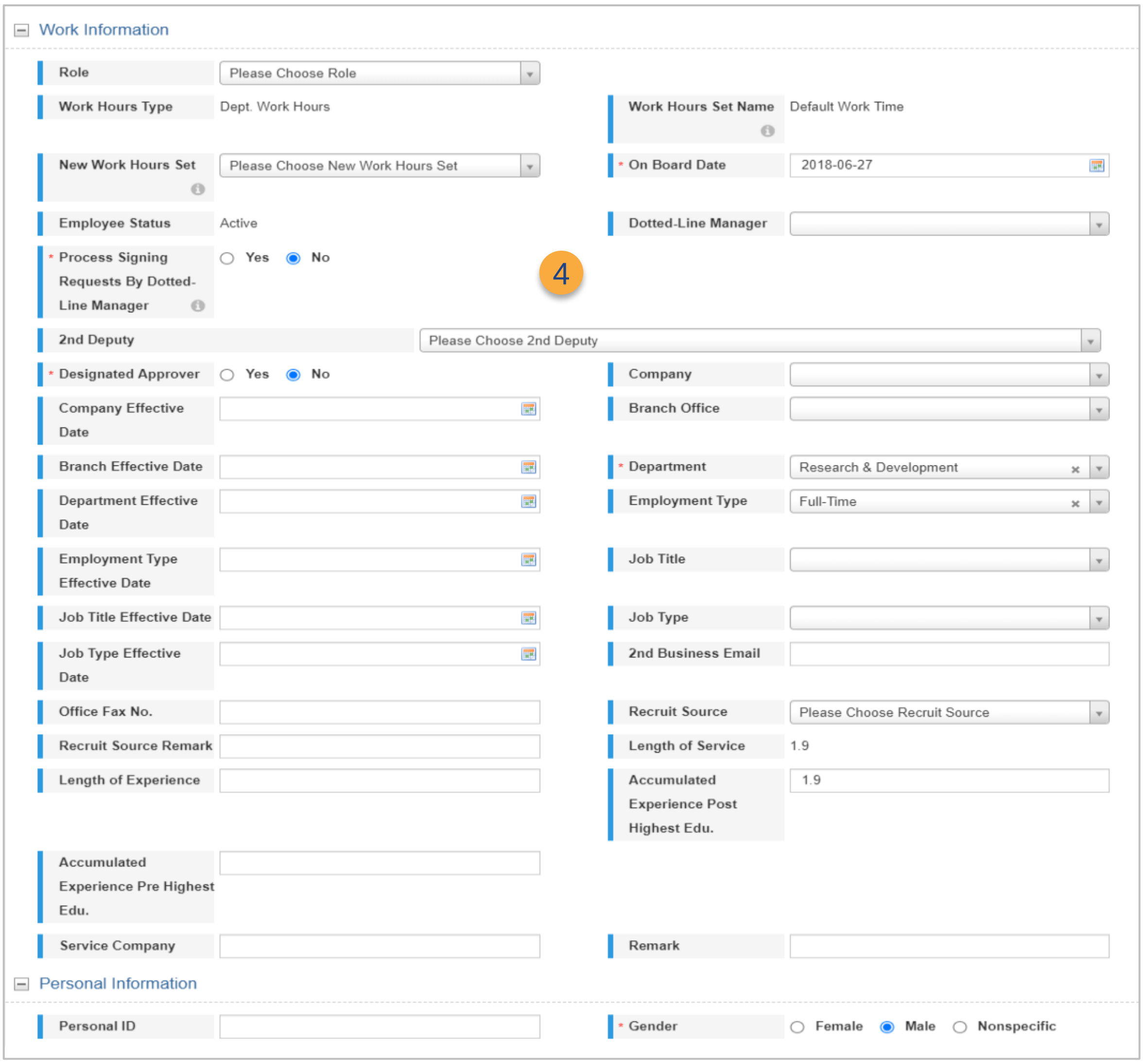
Field	Description	Note
	their deputy are not allowed to take leave simultaneously.	
Business Email	All email notifications are sent to this address.	Employees can choose to turn off email notifications.
*Login Email or Mobile Number	Used to bind employees to their employee profiles.	
*Work Time Type	- Fixed Work Hours: For employees who work fixed work hours. ■ Work Hours Type: The default is set to Department Work Hours if not specified. ■ Work Hours Name: The default is set to Default Work Time. ■ Set New Work Hours: Select new work hours. - Shift Schedules: For employees who work on shift schedules.	Required for Shift.
*On Board Date	Some leaves and payroll items are calculated prorated to employees' length of service.	Set a new on-board date for reinstated employees who use their old profiles to reset their length of service.
*Dotted-Line Manager	Dotted-Line Managers can help process employee requests if needed. Else, this option can be omitted.	
*Process Signing Requests by Dotted-Line Manager	- The default is set to No. - If set to Yes, all requests will be processed by the dotted-line manager and follow the organization hierarchy for approval.	Applies to all requests.
*Designated	If set to Yes, other employees can select	It can also be set using

Field	Description	Note
Approver	this member to approve expense and approval request forms.	the Approver Assignment option.
*Designated Shift Manager	If set to Yes, this member is the shift manager and can sign off shift employees' requests.	Effective when Shift is enabled, and the member is on shift schedule.
*Department	Department hierarchy affects how requests are processed.	Please refer to Image STEP 2-a.
*Employment Type	Affects employees' eligibility for some leaves and applying for overtime.	Required for Leave Pro and Overtime.
FaceDo Photo	Upload a photo for FaceDo Facial Recognition Time Clock app.	Required for FaceDo Facial Recognition Time Clock app as detailed in the Attendance Tool Manual.
*Gender	The default is set to Nonspecific. It affects the eligibility of gender-specific leaves.	Required for Leave Pro.
Length of Service	Automatically calculated based on the on-board date. Edit is not allowed.	Required for some leaves in Leave Pro.
Length of Experience	Employees' total experience can be a factor in calculating prorated leave types in Leave Pro.	Required for some leaves in Leave Pro.
Accumulated Experience Post Highest Education	Length of Experience – Accumulated Experience Pre Highest Education + Length of Service	
Suspension / Reinstatement Tab	Suspensions and reinstatements will affect employees' length of service, and these records are listed here.	Suspensions will affect employees' tool use.
Enrollment / Resignation Tab	Employees with a resigned employment status will affect their use tool and their last month's payroll calculation, and	Resignations will affect employees' tool use.

Field	Description	Note
	these records are listed here.	
Miscellaneous Fields	For record and classification purposes only.	







1. Click Employee > Profiles.
2. Use the search filter to locate the profile for edit.
3. Click the Edit icon.
4. Fill out the fields.
5. Click the Save button on the button of the page.

STEP 3 .Start

a.Shift Schedule Setup

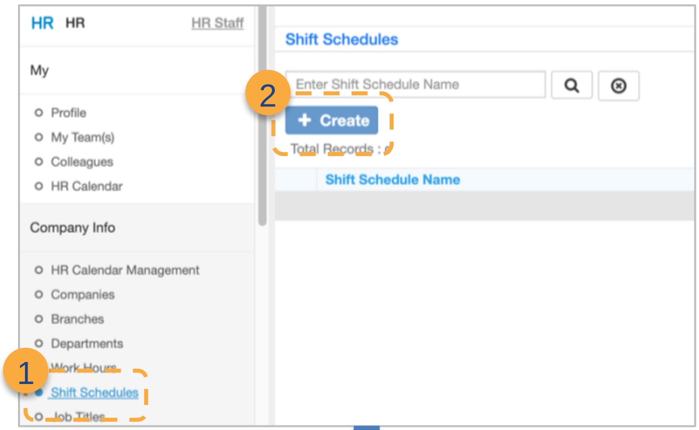
- Set multiple shift schedules.
- Each schedule with its own shifts and shift employees.
- No flexible work time.

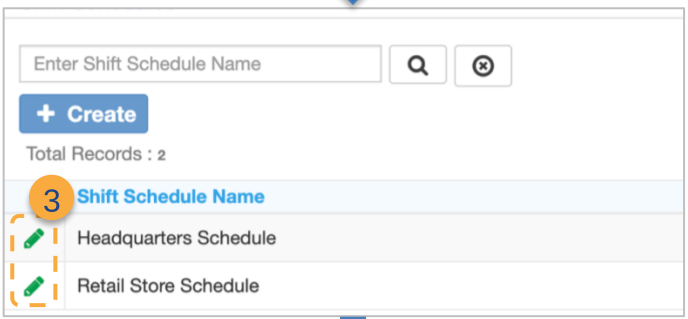
Use Attendance to clock in/out

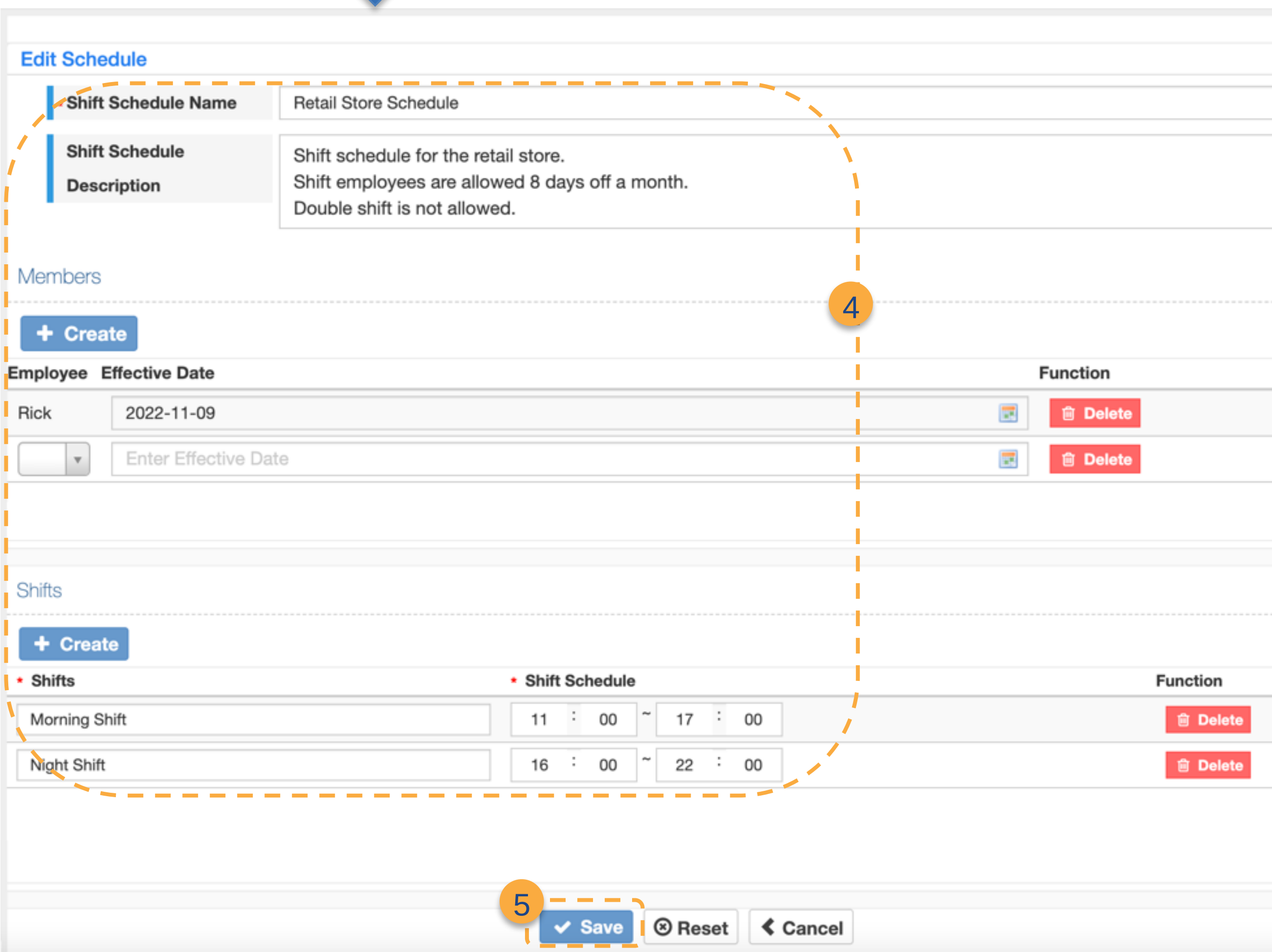
Apply for leaves as usual

Schedule shifts using shift calendar

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ○ App
Data Integration	Attendance, Shift		
Requirement	○ Mandatory ● Optional		
Key Settings	1. Set shift schedules via HR or Shifts. 2. Create multiple schedules for employees in different regions or purposes. 3. Each employee is fixed to one shift schedule to accurately calculate employees' work hours. 4. Create multiple shifts for each schedule.		







Create a Shift Schedule

1. Click Shift Schedules.

2. Click + Create to create a shift schedule.

Edit a Shift Schedule

3. Click the Edit icon to edit a shift schedule.

4. Fill out the necessary fields.
   a. Shift Schedule Name
   b. Shift Schedule Description: Add relevant information if needed; viewable only to the Shift Managers.
   c. Employee: Add shift employees who will use this schedule.
      - Employees listed are from the Employee Profiles in the HR tool who work on a shift schedule.
      - Effective Date: When the employee can start scheduling shifts.
      - Delete: Delete employees from the shift schedule.
   d. Shift: Create shifts in the shift schedule, and each shift is color labeled.
5. Click Save to finish.

b.Timesheet Project Setup

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer ● Project Manager (Timesheet)	Interface	● Web ○ App
Data Integration	Timesheet		
Requirement	○ Mandatory ● Optional		
Key Settings	1. Available when Timesheet is enabled. It allows employees to input the work hours to determine the total project hours. 2. Note that Timesheet HR Staff and Project Managers can only edit partial project information as opposed to the HR Staff of the HR tool.		

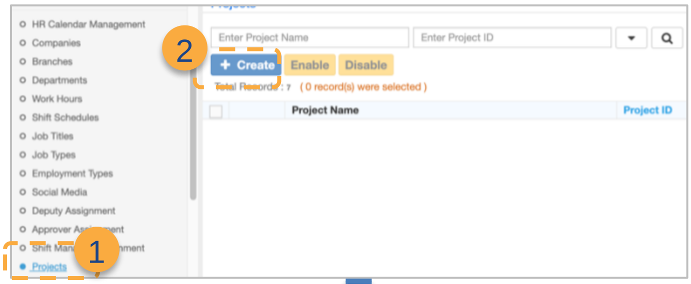
Create a Project

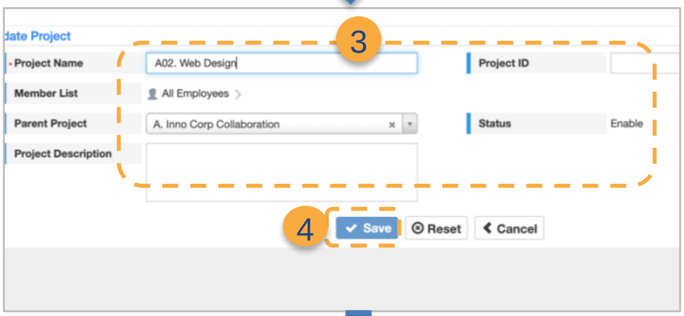
1 Click Projects.

2 Click + Create.

3 Fill out project information.

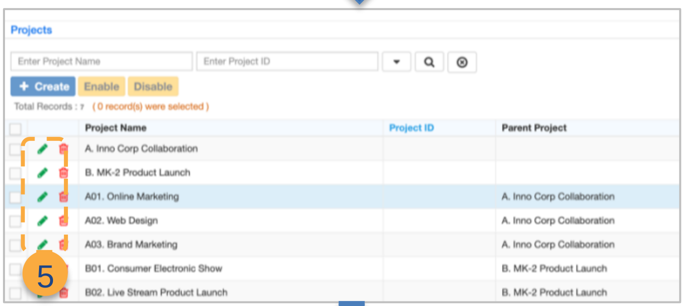
4 Click Save to finish.





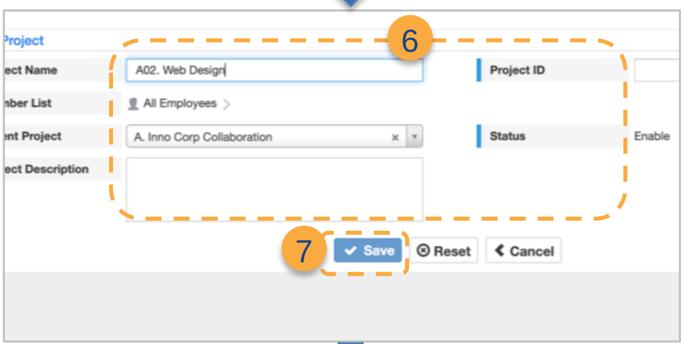
Edit Project Details

5 Click the Edit icon.



6 Update project information.

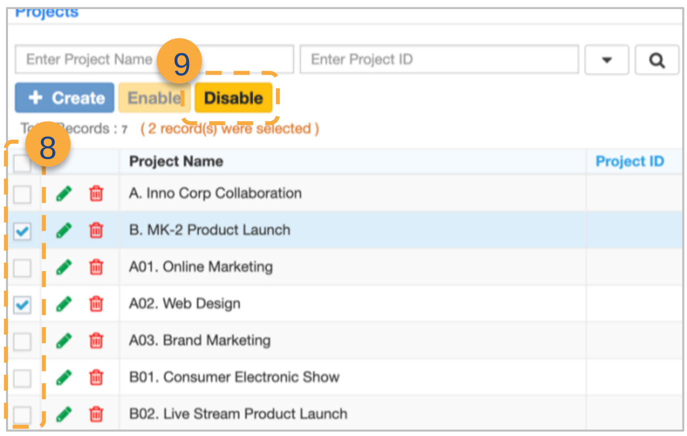
7 Click Save to finish.



Disable Projects

8 Use the checkboxes to select projects.

9 Click the Disable button to disable projects and members will no longer need to input work hours for the projects.



More tutorials
coming soon.