Overtime Tool Manual

WorkDo Tool Guide

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WorkDo
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I 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 Overtime, 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 I-1. WorkDo 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	

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

II Overtime: Automated Overtime Tracker

Although the advanced tools offer a set of preset settings that can fit into any company organization and welfare program, it is also flexible enough for anyone to change these settings to create their cloud team collaboration workplace. Remember, the HR tool is fundamental to all the settings for you to realize an all-in-one workplace! Once you have set the company's organization, work hours, employee profiles, and company calendar, your settings will automatically apply to all other advanced tools. It's that simple!

The Overtime tool tracks employees' overtime work hours and compensations. With this tool, employees can apply for overtime and check the manager's approval process in real-time; coupled with Leave Pro and Payroll, the system will automatically calculate and display employees' overtime work hours and leave taken for a convenient all-in-one payroll calculation. Overtime is one of the essential tools that to realize a virtual workplace. Please refer to the HR Tool Manual to complete the settings.

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It is simple to get Overtime up and running in no time. Please refer to the steps in Overtime Settings to swiftly set up the Overtime tool.

▼ Table II-1. Overtime HR Dependencies

HR Setting	Dependency (* Must be filled)
*System Settings	Affects how the approval workflow works.
*Work Hours	Affects clock in/out times and how overtime is applied.
*Departments	Determines which department manager will sign off on the overtime requests.
*Employment Types	Depending on the setting, certain types of employees may not be able to apply for overtime.
*HR Calendar	Determines which days are workdays, non-workdays, or holidays, and the days affect how overtime is applied.
*Employee Profiles	Employees who work by fixed work hours can apply for overtime; employees who work by a shift schedule cannot. And only accounts that are bound to the workplace can apply for overtime.

III Set Up

This section will guide you on how to set up the Overtime tool. The process includes three stages and requires a member with the HR Staff tool role. The Overtime tool is connected to the HR tool, so please refer to the HR Tool Manual for details.

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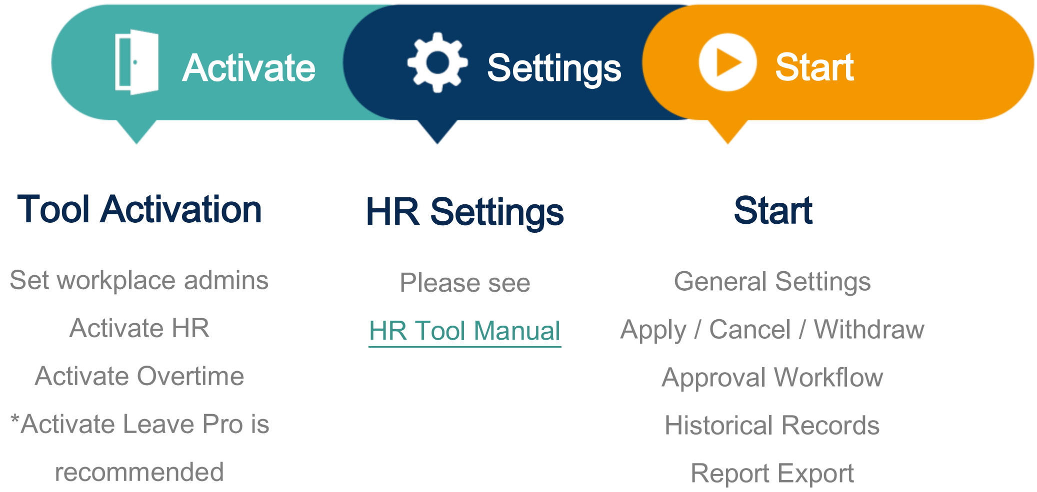

▲ Image III-1. Setup Process

STEP 1 . Tool Activation

WorkDo is designed for workplace admins and tool admins to compartmentalize information among all workplace members (Table Step 1-1).

Workplace admins include the owner and multiple admins that can adjust workplace settings. Normally, the workplace admins are the management of IT employees. The tool admins[1] control the data others see per tool. Different tools could have different members as tool admins. The tool activation is done by the workplace admins.

[1] For more information on tool admin authorities, please see STEP 1-b Set Up Tool Roles.

▼ 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 tools roles	●	●	x
Maintain tool data	x	x	●

a.Confirm/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 Up Tool Roles; else, you need to have one of the admins appoint you.

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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 Up Tool Roles

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

▼ Table STEP 1-c Overtime Tool Roles

Tool Role	Authority	Description
No Role	The Overtime tool is not available to these employees.	● Could be used for interns or part-time employees.
Employee	These employees can use Overtime to apply for overtime work and view their historical application records.	● The default tool role for newly joined employees. ● Please refer to STEP 2-c of the HR Tool Manual to set up department

Tool Role	Authority	Description
		managers and dotted-line managers to sign off on the overtime requests.
HR Viewer	The HR Viewers can review all overtime records and related tool settings.	● Suitable for managers and supervisors.
HR Staff	The highest access level and manages all records and data.	● The workplace owner inherits the HR Staff tool role by default upon tool activation.

Manage Tool Roles

1. Have 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 Overtime 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.

We recommend that you enable the use of Leave Pro if "compensatory leave" is an option in the compensations. The approved overtime hours will be automatically converted to compensatory leaves.

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STEP 2 . Start

Overtime allows managers to approve employees' overtime requests and monitor their work schedules in real-time to help them achieve a better work-life balance.

Overtime's approval flow follows settings in the HR tool, as shown in Table II-1. Therefore, please refer to the HR Tool Manual for the related settings before activating Overtime.

a.Overtime Settings

Option	**Configuration > General Settings**	Interface	● Web ● **App**
Tool Role	○ Employee ● HR Staff ● HR Viewer		
Data Integration	● Preliminary Setup: Employment Types and company workdays in the HR tool determine how overtime works. ➲ HR > Work Hours / Shift Schedules > Workdays ➲ HR > Employee Profiles > Work Time Type & Employment Type ● Effect: Compensation, Overtime Limits ➲ Compensation | Affects if Compensatory Leave is a selectable option and if the overtime hours are automatically added to the Compensatory Leave in Leave Pro. ➲ Overtime Limits | Limits how many overtime hours are allowed in a day, a week, or a month.		
Key Setting	● App: Overtime Base Unit, Request Policy, Compensation, etc. ● Web: Overtime Limits, Report Period, and Applicable Employment Types.		

Field	Description	Note
Overtime Configuration		Tab
Base Unit	The minimum amount of time for overtime application.	If Compensatory Leave is used in Leave Pro, the base unit will remain in Half Hours even when the Minutes option is chosen.
Request Policy	How overtime requests are applied.	
Compensation	● Overtime Pay: Overtime requests and reports are marked for additional pay when selected. ● Compensatory Leave: Compensatory Leave is automatically added as a Leave Type in Leave Pro when selected, and the approved overtime hours will be converted to compensatory leaves. ● Employees are allowed to pick the compensation when both options are selected.	
Decide by Manager	Allow managers to determine employees' compensation types when both are selected.	
Use Break Time	Allow breaks for employees. ● No: All overtime hours are counted. ● Yes: Break time doesn't count towards the total overtime hours.	
Must State a Reason for Applying	Is it mandatory to state a reason for the overtime application? ● Default: No	

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Field	Description	Note
Overtime		
Enable Monthly Overtime Limit	• No: Not limited. • Yes: Set a monthly limit for overtime hours employees are allowed to apply.	**Applications are not allowed when the limit is reached.**
Enable Daily Overtime Limit	• No: Not limited. • Yes: Set a daily limit for overtime hours employees are allowed to apply.	**Same as above.**
Enable Non-Workday Overtime Limit	• No: Not limited. • Yes: Set a non-workday overtime limit employees are allowed to apply.	**Same as above.**
Report Period	Set a time report range.	
Applicable Employment Types	Tied to the HR tool. Set employment types who are allowed to apply for overtime work.	
Workflow Configuration		Tab
Request Workflow Policy	• Bypass HR Staff: The HR Staff is not involved in the request workflow. • HR Staff Takeover: Requests are approved by the HR Staff unless escalated back to the Department Manager for final Approval. • HR Staff First then Department Manager: Requests must be approved by the HR Staff and then send to the Department Manager for final approval. • Department Manager First then HR Staff: Requests must be approved by the	

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Field	Description	Note
	Department Manager then send to the HR Staff for final approval.	

1. Have the HR Staff select the Overtime tool.
2. Click General Settings.
3. Go through all settings per your workplace' s needs. You may commence using Overtime if no changes are required.
4. Else, click the Edit button to change the settings (* Must be filled).
5. Click the Save button to store the settings.

How is Break Time Being Deducted?

E.g., If 0.5 hour of break is allowed for every 4 hours of overtime, then

-When for 4 hours of overtime work are applied, 4 hours are counted.
-When 4.5 hours are applied, 4 hours are counted.
-When 5 hours are applied, 4.5 hours are counted.
-When 6 hours are applied, 5.5 hours are counted.
-When 7 hours are applied, 6.5 hours are counted.
-When 8 hours are applied, 7.5 hours are counted.
-When 8.5 hours are applied, 8 hours are counted.
-When 9 hours are applied, 8 hours are counted.
And so on.

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b.Overtime Application

Tool Role	● Employee ● HR Staff ○ HR Viewer	Interface	● Web ● App
Data Integration	● Preliminary Setup: Overtime > Overtime Settings ● Effect: Compensation (Compensatory Leave in Leave Pro)		
Key Setting	● Employees who fit the Employment Types are allowed to apply for overtime work. ● The HR Staff can send overtime requests on behalf of employees when needed.		

Overtime Application

1. Select the Overtime tool and click Apply.
2. Fill out the necessary fields (* Must be filled).
   - Employee: For HR Staff only. When applying on behalf of an employee.
   - Applied/Approved Ovetime Stats: Information only.
   - Date & Time: Only non-working hours are selectable (Tied to the Work Hours setting of the HR tool).
   - Duration: Overtime hours are counted based on Date & Time and the Break Time rule.
   - Compensation: Selectable options are what was set in the Overtime Settings.
   - Photos / Files: Upload relevant information when necessary.
   - Remark: Input a comment or message when necessary.
3. Click Submit to complete the application process.

Unable to apply for overtime work?

Please contact the HR Staff to verify the following settings.

- Overtime > General Settings: Is the Applicable Employee Types are selected correctly?
- HR > Employee Profiles: Is the employee' s Employment Type selected correctly?

c.Cancel / Withdraw Overtime Requests

Tool Role	● Employee ● HR Staff ○ HR Viewer	Interface	● Web ● App

Data Integration	● Prerequisite: Overtime > Overtime Application ● Effects: ➲ Overtime > Approve Overtime Requests ➲ Overtime > Overtime Records ➲ The Compensatory Leave quota will also be updated when requests are successfully canceled or withdrawn.
Function	Users can cancel or withdraw their requests when overtime work is no longer required. Managers, on the other hand, can reject them, too. ● Manager – Reject the requests. ● Employee – Cancel / withdraw the requests. ➲ Cancel: The Cancel option is available when the requests have yet to be approved. ➲ Withdraw: The Withdraw option is available when the requests have been to be approved. Withdrawing a request requires managers' approval. ● Overtime Records include canceled and withdrawn requests.

Cancel / Withdraw Overtime Requests

1. Select the Overtime tool and click Overtime Records.
   - Employee: My Overtime Records
   - HR Staff: Company Overtime Records
2. Use the filters to search the overtime request.
3. Click on the record to view its details.
4. Cancel: Click the Cancel button and fill out a reason if needed, then click the Cancel button again to cancel the request.
5. Withdraw: Click the Withdraw button and fill out a reason if needed, then click the Withdraw button again to withdraw the request.

d.Overtime Request Sign-Off

Tool Role	○ Employee ● Manager ○ HR Staff ○ HR Viewer	Interface	● Web ● App
Data Integration	● Prerequisite: Overtime > Overtime Application ● Effect: ➲ Overtime > Overtime Records ➲ When compensatory leave is chosen as the compensation for an application that was rejected or withdrawn, the overtime hours count towards the compensatory leave will be deducted.		
Function	Set in the HR tool, managers or dotted-line managers are responsible for signing off on employee requests. If you are a manager or a dotted-line manager, the sign-off options are available for you. ● Approve: The request is approved, which ends the sign-off flow. ● Escalate: The request will escalate to the second-level manager for a decision.		

- Reject: The request is rejected, which ends the sign-off flow.
- Withdraw: The request withdrawal is approved, which ends the sign-off flow.

Request Sign Off via the Dashboard

Use the Workflow function on the Dashboard to sign off on requests is quick and easy!

- I Applied: Everyone’ s own request.
- Assigned to Me: For Managers to view unsigned requests.
- I Processed: For Managers to view requests they signed.
- All Forms: View all the requests.

Request Sign-Off

1. Enter the detail view of the overtime request.
   - Notification Center: Click the overtime request notification.
   - Dashboard: Workplace > Dashboard > Workflow > Assigned to Me > Click All Forms and select Overtime.
   - Overtime: Workplace > Do > Overtime > Overtime Requests > Approve.
2. Select requests.
   - Single sign off: Click the request to enter the detail view.
   - Batch sign off: Use the check boxes to select multiple requests.
3. Decision: Select applicable buttons to approve, reject, escalate, or withdraw.

e.Overtime Records

Employees, managers, and the HR Staff can view overtime records that their access allows. Here is how!

Tool Role	● Employee ● Manager ● HR Staff ● HR Viewer	Interface	● Web ● App
Data Integration	Prerequisite: Overtime > Overtime Application		
Function	● Different roles offer different accesses. ● Overtime records include date and time, request ID, employee information, duration, compensation, and request status.		

▼ Table STEP 2-e Overtime Record Access

Records	Description	Employee	Manager	HR Staff	HR Staff Manager
My	Employee	●	●	●	●
Dept.	Department-wide	x	●	x	●
Company	Company-wide	x	x	●	●

View Overtime Records

1. Workplace > Do > Overtime > Overtime Records.
2. Refer to Table STEP 2-e for your access level.
3. Use the filter to search the records.
4. Click on desired record to view its details.

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f.Comments Section & Share

Tool Role	Employee, Manager, HR Staff, HR Viewer	Interface	Web, App
Data Integration	Prerequisite: Overtime > Overtime Application		
Function	You can use the Comments section to communicate privately without worrying about flooding the group chat, or you can use the share button to include people of interest for discussion.		

Leave Comments

1. Refer to Table STEP 2-e for your access level.
2. Select a request to view the request details.
3. Leave a comment in the comment section or upload attachments.
4. Use @ to mention members and get their attention.

Share Request Link

1. Refer to STEP 2-e to find the desired request.
2. Click the request to view its details.
3. Click the Share button.
4. Copy the request link and share it with other members. Note that members without authority (tool role) cannot view the request.

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g.Request Print Out

Tool Role	● Employee ● Manager ● HR Staff ● HR Viewer	Interface	● Web ○ App
Data Integration	Prerequisite: Overtime > Overtime Application		
Function	● You can print out the overtime request as needed.		

Print Out Overtime Request

1. Refer to Table STEP 2-e for your access level.
2. Select a request to enter the detail view.
3. Click Export PDF Report.
4. Download the request for print.

h.Report Export

Tool Role	○ Employee ○ Manager ● HR Staff ● HR Viewer	Interface	● Web ○ App
Data Integration	Prerequisite: Overtime > Overtime Application		
Function	● Use the filters to narrow down the report range. ● Report format: CSV or PDF		

Overtime Report Export

1. Have the HR Staff or HR Viewer click the Overtime Summary.
2. Use the provided filters to narrow down the report range.
3. Select Export PDF or Export CSV to download the desired report format.