HR Tool Manual

WorkDo Tool Guide

V.201016

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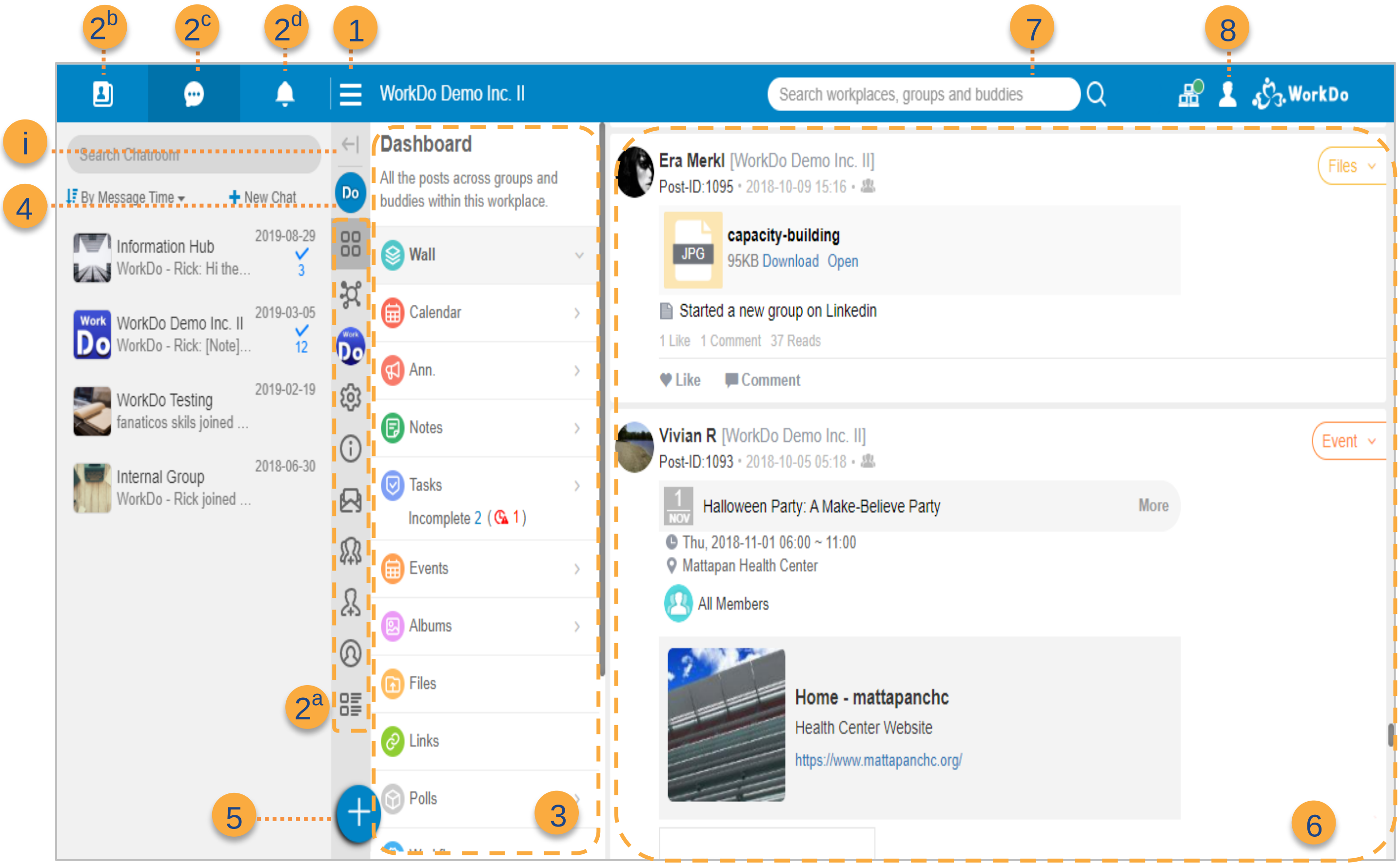
I Page Navigation

Welcome to 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, button panel will appear when navigation area is closed.
1	Workplaces	Switch between workplaces/My Upcoming/My Shelf and Join/Create Workplaces.
2	Main Menu	a. Workplace: The basic functions of the workplace. b. Social: Starred, groups and buddies. c. Chatrooms: All the chatrooms you are in. d. Notifications: All notifications related to you.
3	Dashboard	All the cross-groups and buddies items related to you.
4	Do Button	All the tools you can use in the workplace.
5	Create	Create new items.

6	Main Page	Shows contents such as Dashboard Wall and task list, click to enter detail view, can also create new items.
7	Search	Shows search history of workplaces, groups and buddies.
8	My Setting	Personal settings such as accounts, change password, give feedback and log out.

Check Image I-1 to quickly start navigating WorkDo!

Log In

- Default is the last workplace you logged out of.

Dashboard

- Cross-groups and buddies.

Click tools in 3 to display the content in 6 (main page)

Workplaces: Switch/Create/Join

- Click the hamburger menu to show the workplace list.
- Click the Do button 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 see groups/buddies.
- Click Groups/Buddies or the Do buttons for tools to use.

View/Create/Edit

- Click 5 to create new items.
- Click content in 6 to enter detail, click tool name to see menus.
- Click i to expand main page.

Notifications

- Click 2^d to view notifications.

Chatrooms

- Click 2^c to show all chatrooms
- Click one of the chatrooms to enter the chatroom.

▲ Image I-1. Quick Start

II Tools (in Do Page)

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

Tools such as Attendance, Check-In, Leave, Leave Pro, Overtime, Expenses and Approvals are dependent on the HR tool. The HR tool is set as activated once you have created a workplace while other tools such as Payroll, Leave Pro and Attendance 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 II-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
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shifts	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	

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

III HR: The Pillar of WorkDo

Every tool in Do has its default settings that can be changed to your company' s preferences. The basis for some of the tools is HR. Table III-1 shows the correlations between HR and other tools and how it affects them[1]. The HR settings include department structure, work hours, employee profiles, HR calendar and more. After setting up the HR tool, you can swiftly set up tools listed in Table III-1 with ease!

▼ Table III-1. HR Tool

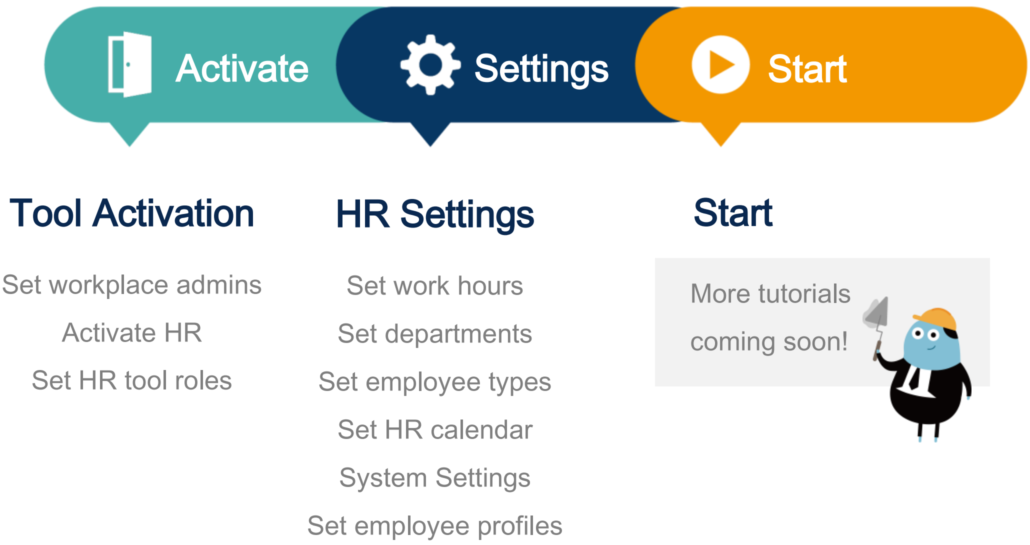
HR Setting	Payroll	Attendance	Check-In	Leave	Leave Pro	Overtime	Expenses	Approvals
Work Hours	x	●	x	x	●	●	x	x
Departments	x	●	●	●	●	●	●	●
Employee Types	x	x	x	x	●	●	x	x
Deputy	x	x	x	●	●	x	x	x
Approver	x	x	x	x	x	x	●	●
HR Calendar	x	●	x	x	●	●	x	x
System Settings	x	●	x	x	x	x	x	x

[1] Settings such as companies, job titles, etc. will not directly affect other tools, thus, are not included in this document. Please see Step 2-c Employment Types for reference.

HR Setting	Payroll	Attendance	Check-In	Leave	Leave Pro	Overtime	Expenses	Approvals
Employee Profiles	●	●	●	●	●	●	●	●

IV Set Up

Let' s start by setting up the HR tool roles and its settings, shall we?



▲ Image IV-1. Setup Process

Each step of setting up requires you to prepare different data. Please follow Table IV-1 to prepare these data before setting up HR.

▼ Table IV-1. Required Data

Procedure	Required Data	Note
Set tool roles	✓ Activate HR ✓ Select tool admins	✓ By workplace admins[2]

[2] Workplace admin can set up all settings in workplace, please see Step 1 Tool Activation.

Procedure	Required Data	Note
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 an owner and multiple admins that can adjust workplace settings. Normally, the workplace admins are management of IT employees. The tool admins[3] control the data other see per tool. Different tools could have different members as tool admins. The tool activation is done by the workplace admins.

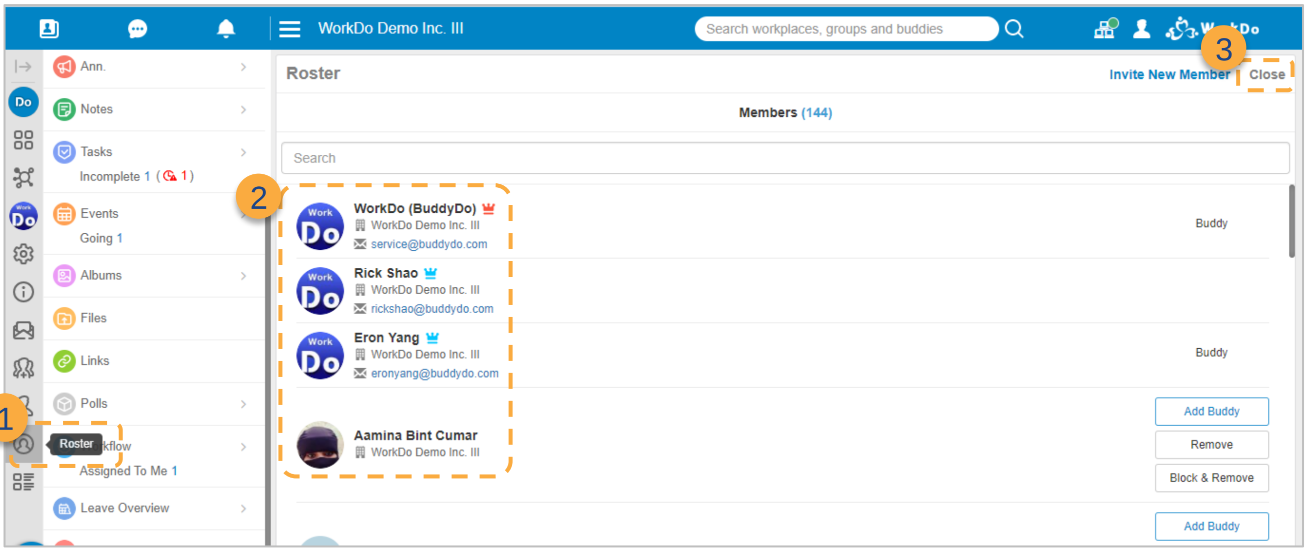
▼ Table STEP 1-1. Admin Authorities

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 basic tool settings	x	x	●
Maintain advanced tool settings	x	x	●

3 Details on tool admin authorities can be found in Step 1-c Set Up Tool Roles.

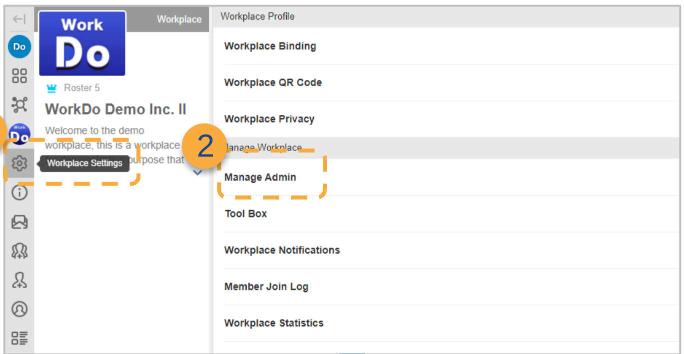
a. Assign Workplace Admins

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

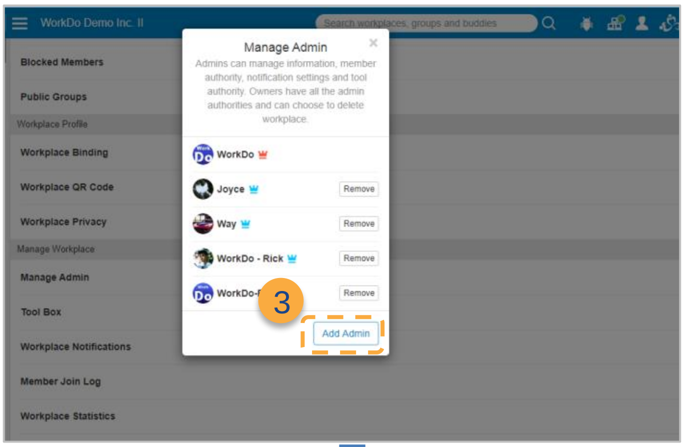


1. Click on the Roster to view all workplace admins.
2. The Workplace Owner is marked with a red crown while the workplace admins are marked with a blue crown. Owner and admins can skip to Step 1-b Tool Box.
3. Click Close to return to the Dashboard Wall.

According to Table Step 1-1, workplace admins are an integral role to maintain all the settings in the workplace. You will need to ask the owner or another admin to assign you the workplace admin role if need be.

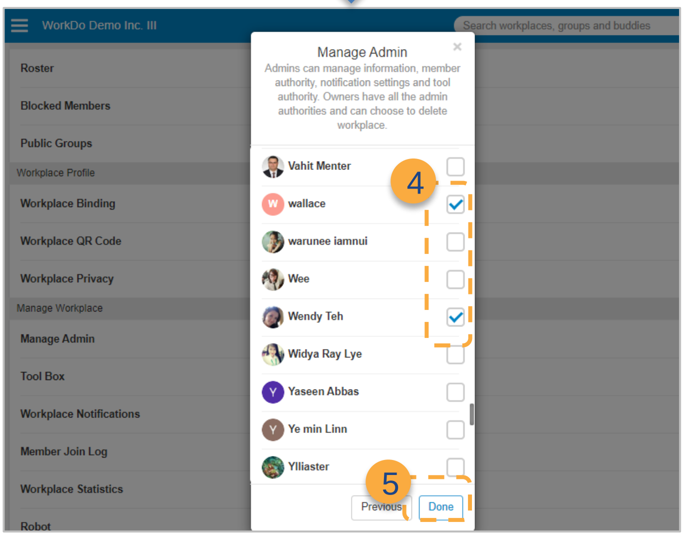


1. ▸ Click the gear icon for Workplace Settings.
2. ▸ Manage Admin.



Red crown = Owner.
Blue crown = admin.

3 ▸ Add Admin.



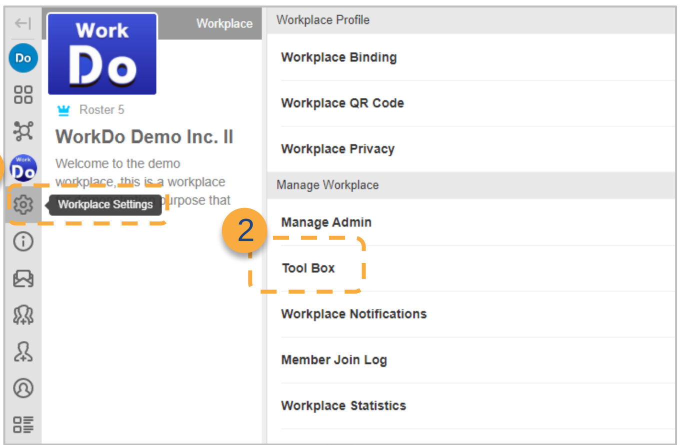
4 ▸ Member select.

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 Workplace Settings.

2 ▸ Click Tool Box.

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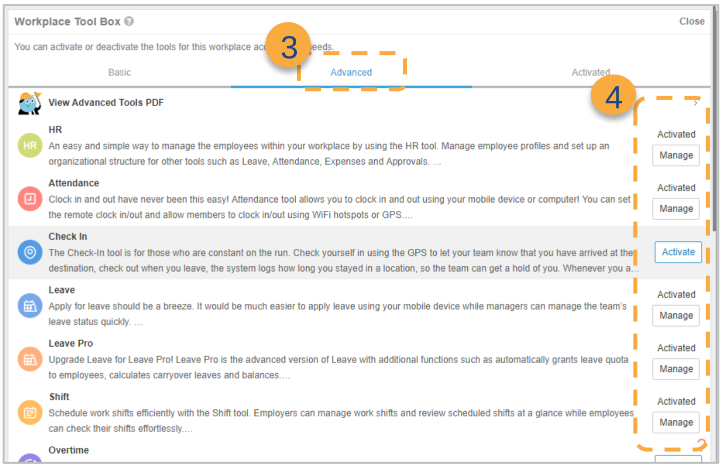

Default is set to the Activated tool page.

3 ▸ Click Advanced to enable or disable tools.

4 ▸ Click Manage to begin assigning roles.

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c. Set Up Tool Roles

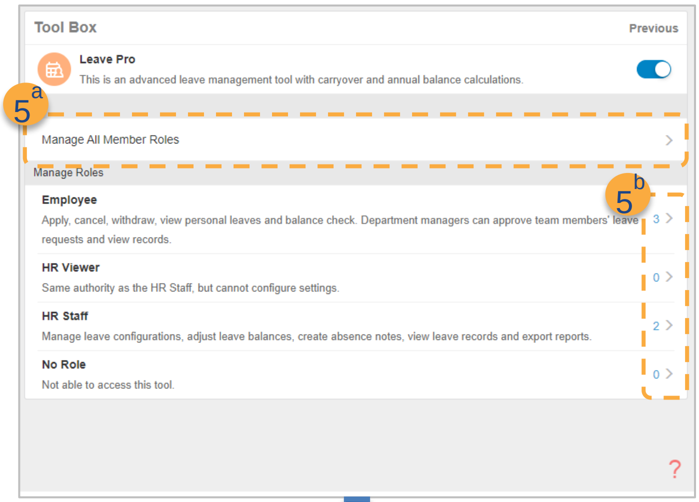
To safeguard sensitive workplace information, many of WorkDo’ s tools require some members to take on the administrator roles to limit access. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are four types of roles in HR: No Role, Employee, HR Viewer and HR Staff. Employees are able to view their own records, the HR Staff could edit all workplace members’ records, the HR Viewers could view all the workplace members’ records but unable edit, and those who have No Role will not be able to use the HR tool.

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, if you are designated as a manager or a dotted-line manager, not only are you able to sign off on various requests, you also have the authority to view the department records as seen in Step 2-b Departments and Step 2-f Manage Employee Profiles.

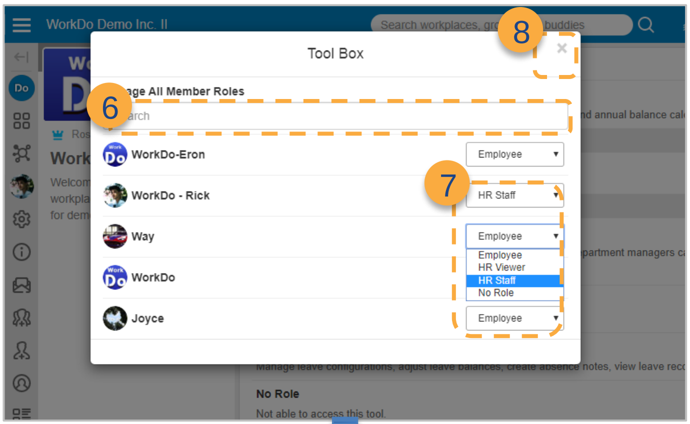
Following step 4, click Manage button to see tool Role and role info.



5 ▸ Change tool roles.

a. Click Manage All Membeccr Roles.

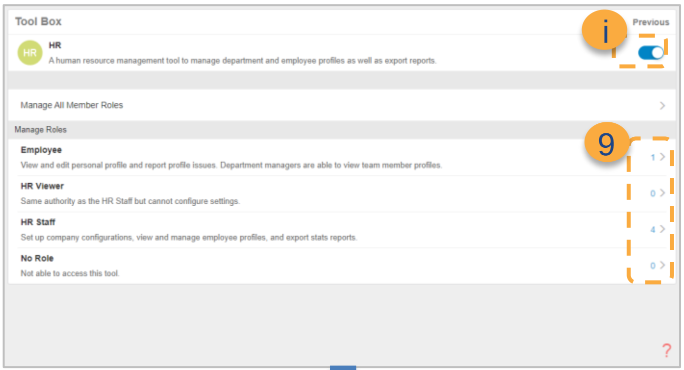
b. Click Employee.



6 ▸ Enter member display name in the search bar.

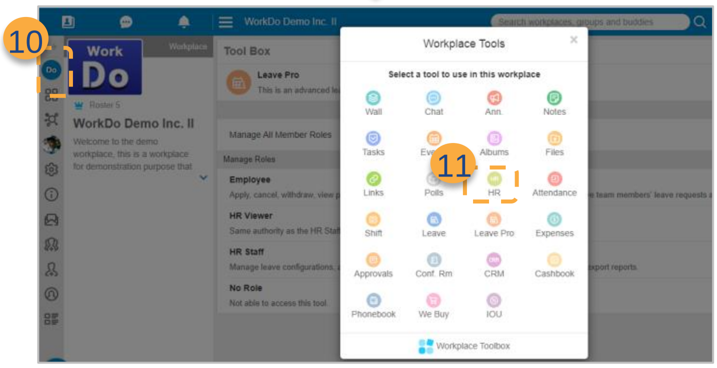
7 ▸ Choose a role in the drop down menu.

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.

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

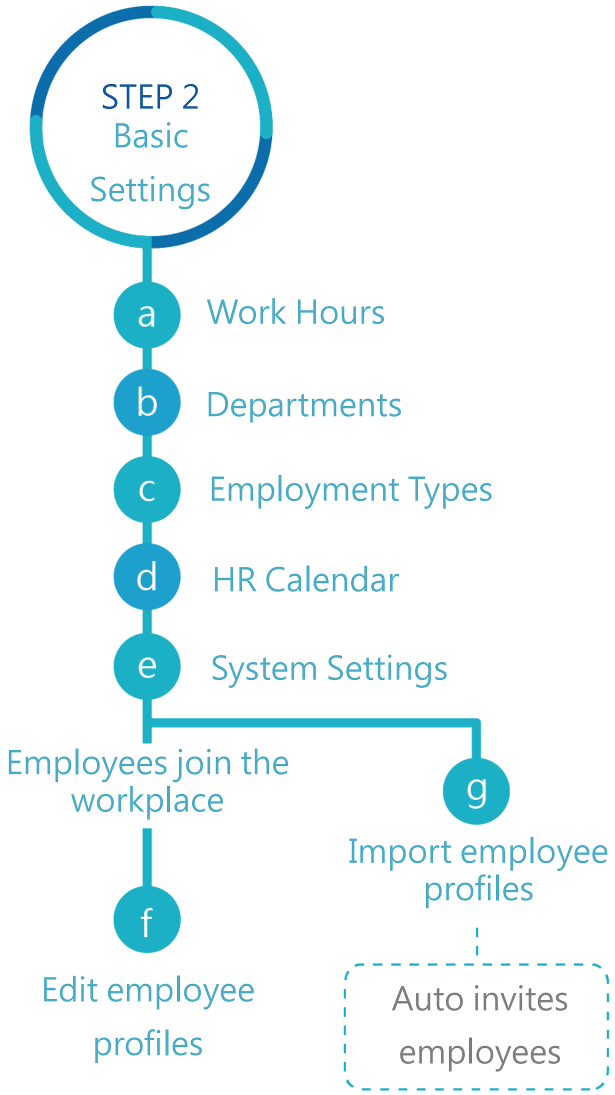
STEP 2 . HR Set Up

Congrats on being an HR Staff! Now you are able to set the workplace work hours, organizational structure, departments, employee profiles, company calendar and whether employees need to clock-in/out, etc.

The HR tool is an integral part of many advanced tool, once you are familiar with the settings, you could customize the digital workplace to reflect how your team really operates on a daily basis.

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!

- Invite employees then edit their profiles: STEP 2-f
  An employee profile is automatically created upon joining the Workplace which can be edited by the HR Staff.
- Batch import employee profiles then invite employees: STEP 2-g
  A recommended method when you want to invite a large amount of employees at once.



▲ Image STEP 2-1. HR Setup Process

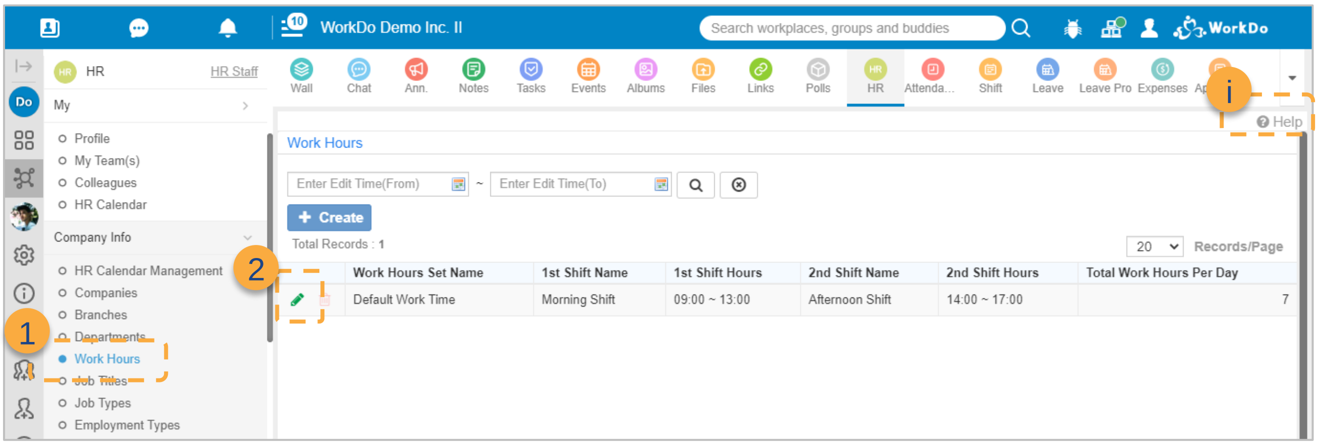
Settings such as work hours, departments, employment types, on board dates, job titles etc. can all be adjusted to reflect your company policies and structure, the settings can also influence how some of the tools in WorkDo operates.

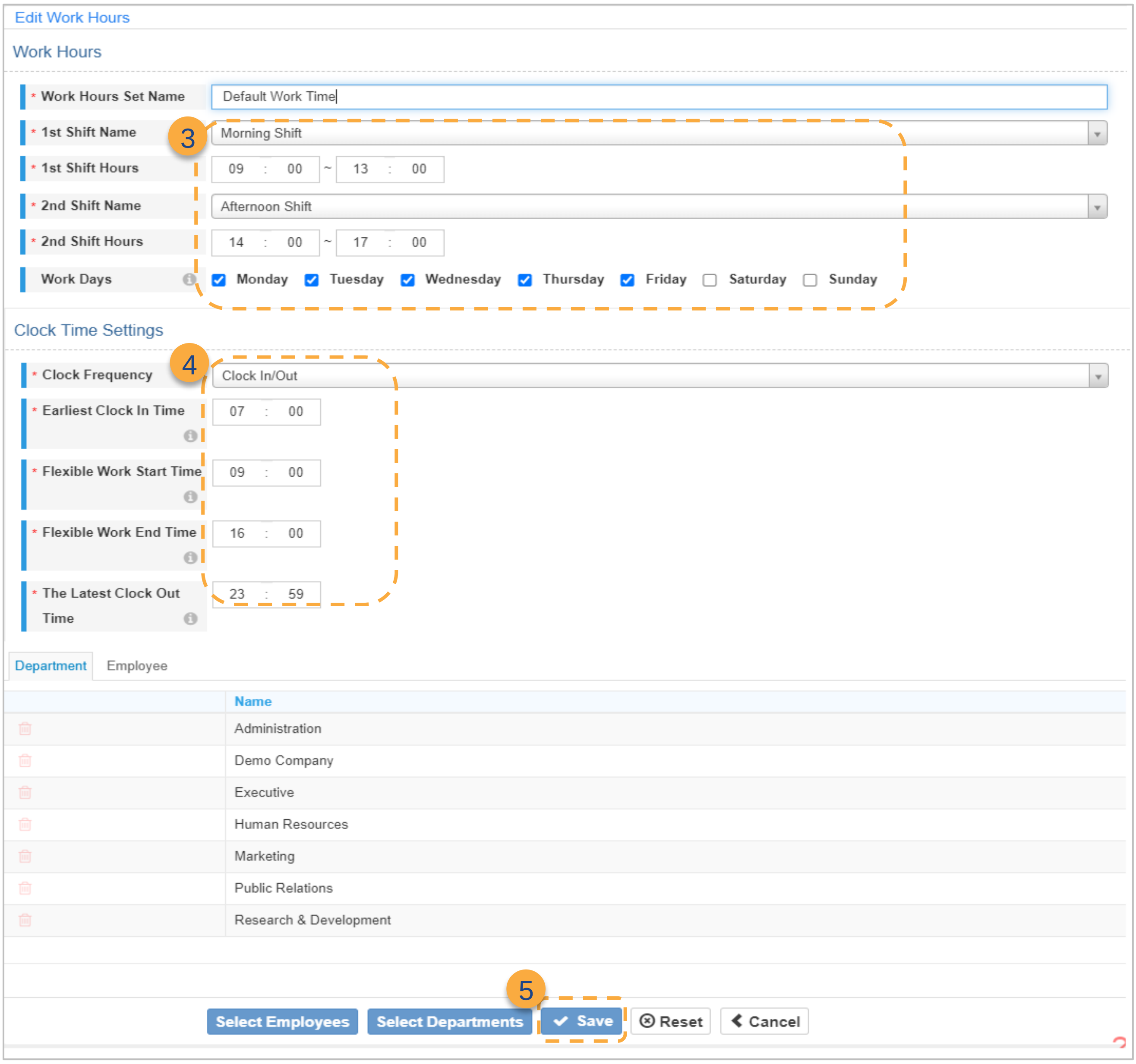
a. Work Hours

Set flexible work hours and/or different work hours for different employees or departments depend on your company policies with this option.

- ## When your company only has one set of work hours

  When HR is enabled, a Default Work Time is set, which is the default work hours that apply to all employees. The time can be modified, but you cannot rename or delete it. Follow the steps listed to change the work hours.





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i ▸ Click to view the instructions.

1 ▸ Click Work Hours.

2 ▸ If the default time works for your workplace, you can skip to Step 2-b, else, click the icon to change the time.

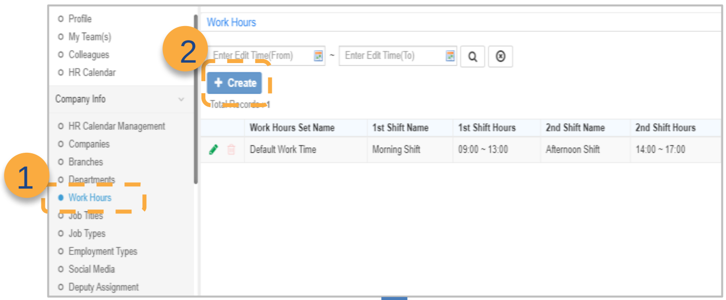
3 ▸ Enter the correct work hours.

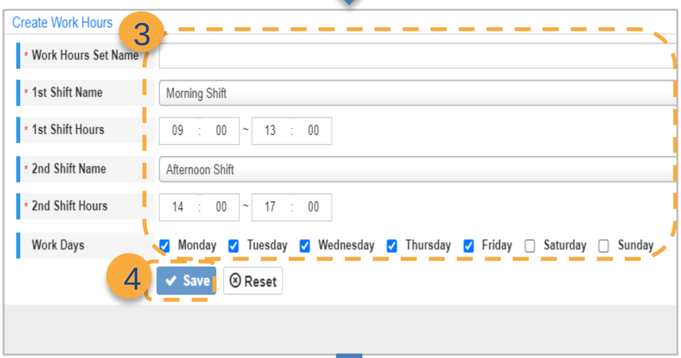
4 ▸ Enter the clock-in/out times[4].

5 ▸ Click Save to complete.

- **When your company has multiple sets of work hours**

  Follow the steps below if your workplace requires multiple work hours for different departments or employees. Different work hours require different clock-in/out times, for your information.





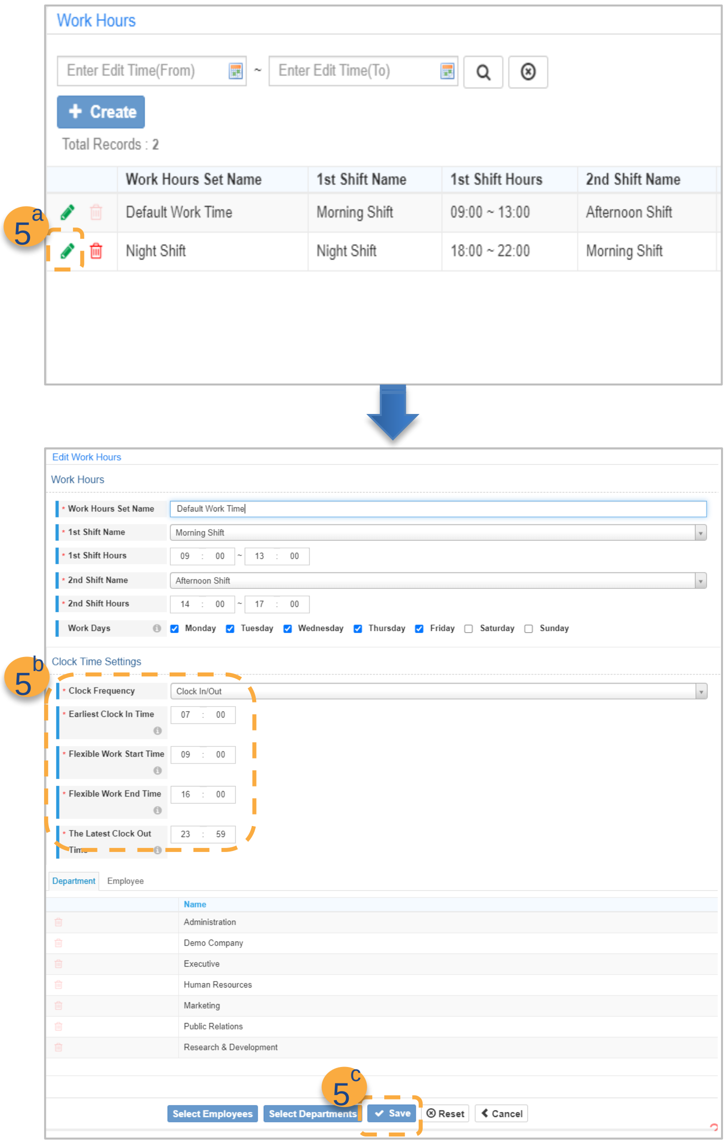
1 ▸ Click Work Hours.

2 ▸ Click Create.

3 ▸ Enter the work hours.

4 ▸ Click save to complete.

[4]Enable the Attendance tool described in STEP1-b~c to unlock the clock-in/out fields.



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

5 ▸ Edit Clock Time Settings

a. Click the Edit button.

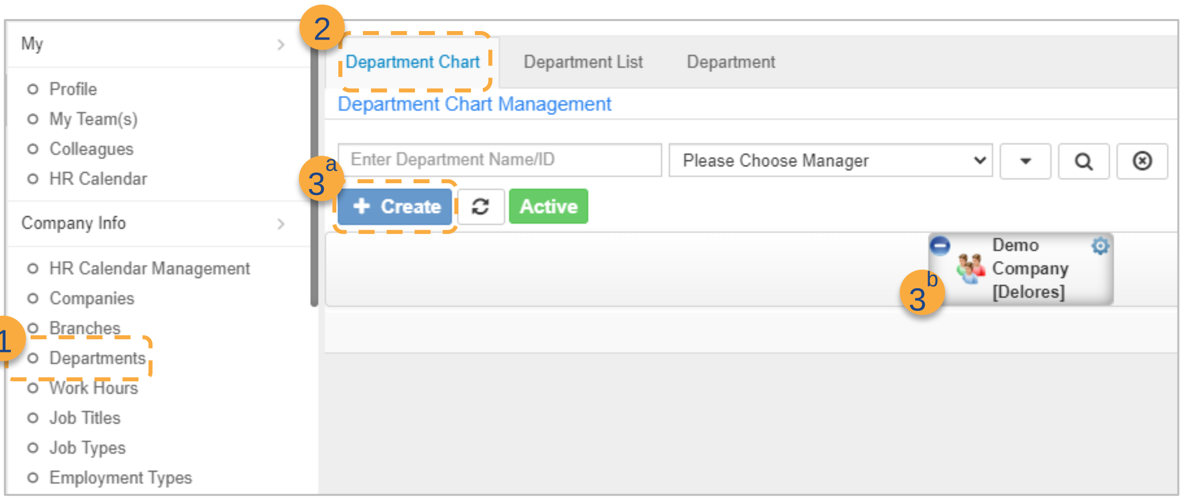
5 ▸ Edit Clock Time Settings

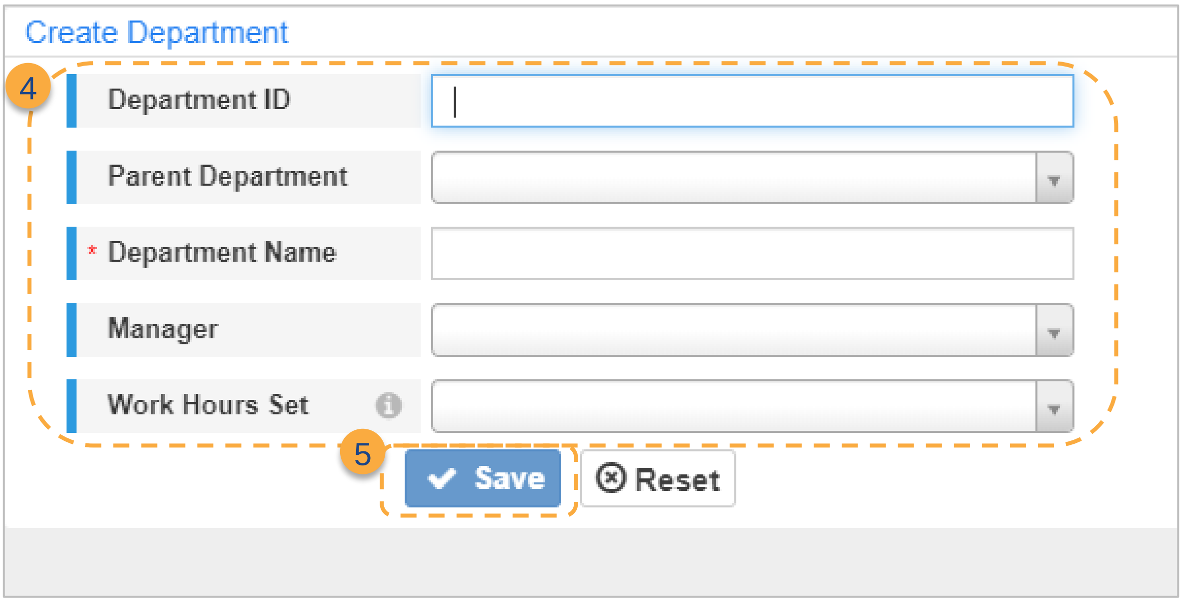
b. Fill out the clock times.

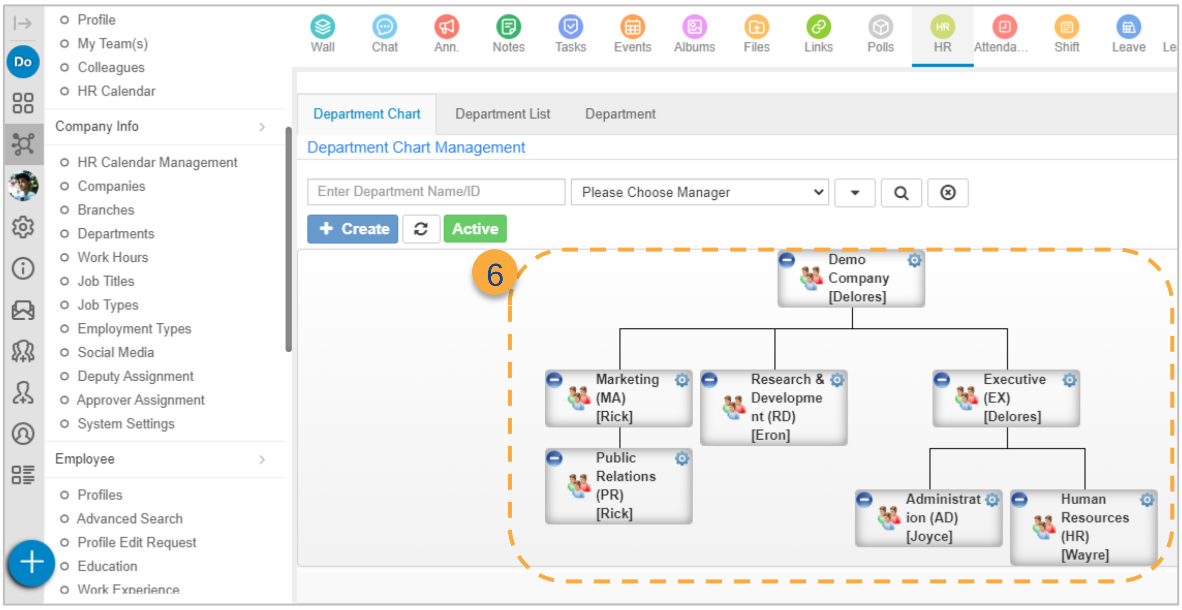
c. Click Save to finish.

b. Departments

WorkDo offers a flexible organizational structure setup, so you set up your virtual workplace to reflect how it operates on a day to day basis. This setting is also tied to the approval sign-off process of advanced tools like Leave, Leave Pro, Overtime, Expenses, Approvals and Attendance appeals. And when you have departments or teams that require different work hours, you can set them up here!







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1 ▸ Click Departments.

2 ▸ Click the Department Chart tab[5].

3 ▸ Choose a or b.

a. Click the +Create button.

b. Click the + button to add a child department.

4 ▸ Fill out the parent department[6], department name, manager and work hours(* must be filled).

5 ▸ Click Save to finish.

6 ▸ You are returned to the last page to verify the settings.

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.

c. Employment Types

Employment Types is an important setting in the Employee Profiles; it is tied to what kind of leaves the employees are entitled to in Leave Pro and whether they are allowed to apply for overtime compensations in Overtime.

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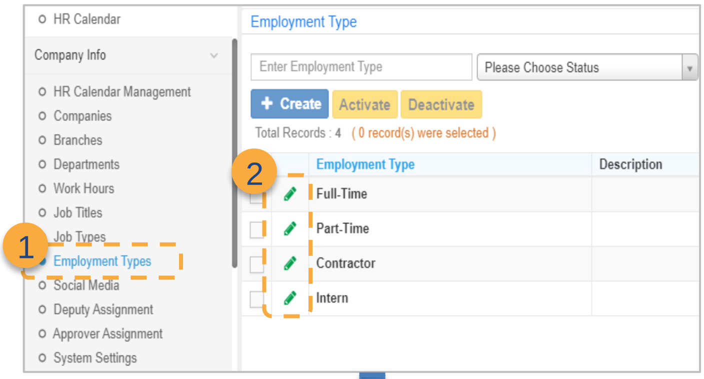
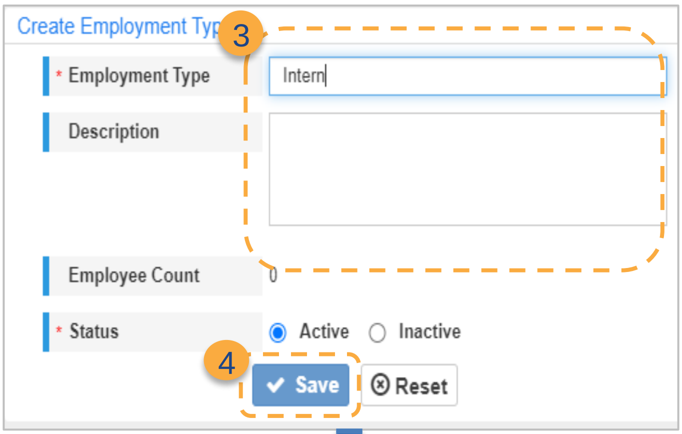
[5]Department Chart, Department List and Department tabs are available; let’ s use the Department Chart for the purpose of this tutorial.

[6]By opting for Step 3b, the department you clicked + will be the parent department.



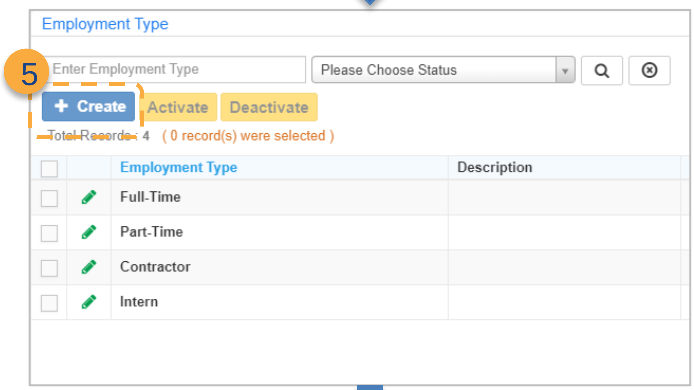
1 ▸ Click Employment Types, 3 default options are available.

2 ▸ Click the Edit icon to change the Employment Types names if they do not fit your organization.

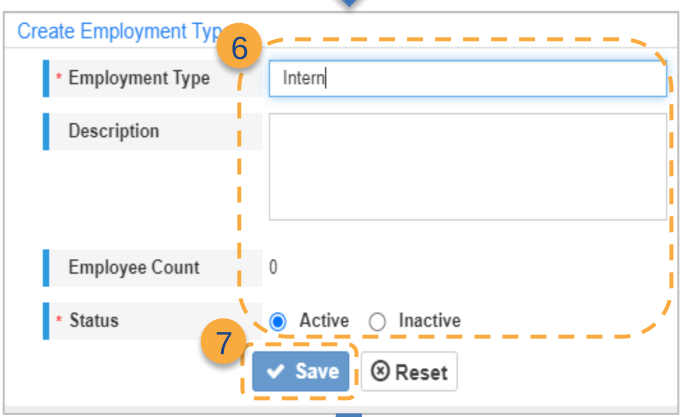


3 ▸ Fill out the description for an employment type if necessary.

4 ▸ Click Save to finish.

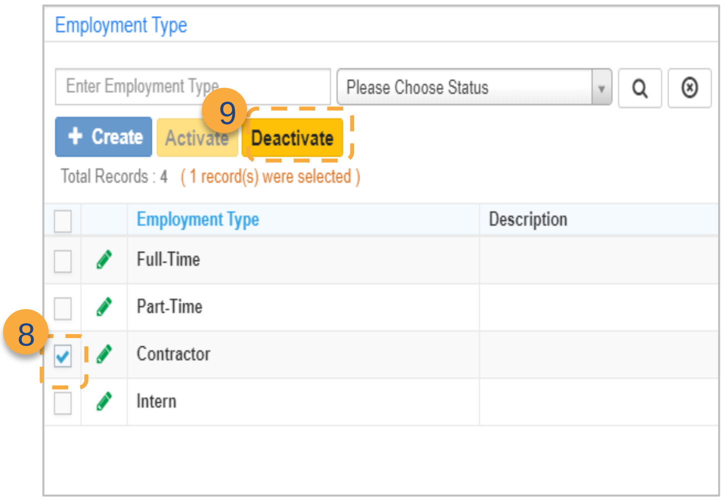


5 ▸ Click + Create to create more employment types if necessary.



6 ▸ Enter the employment type name, description and set the Status to Active.

7 ▸ Click Save to finish.



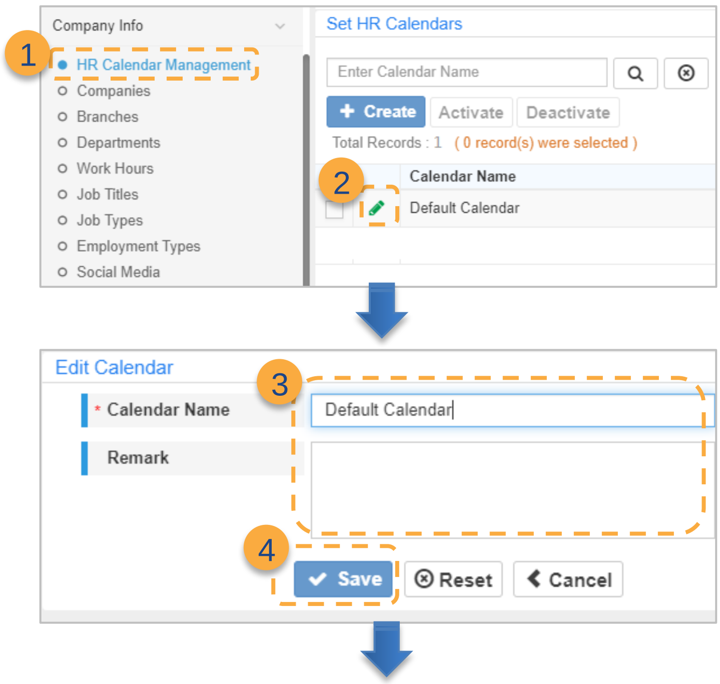
8 ▸ To deactivate, use the check box to select the employment types.

9 ▸ Click Deactivate to set the employment types to Inactive and it will no longer appear in Step 2-f as described.

d. HR Calendar

The HR calendar is crucial to the entire organization, and it is tied to Leave Pro, Overtime and Attendance. When the HR Staff has properly set the public holidays and/or 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 specific departments or members, please follow the steps below.



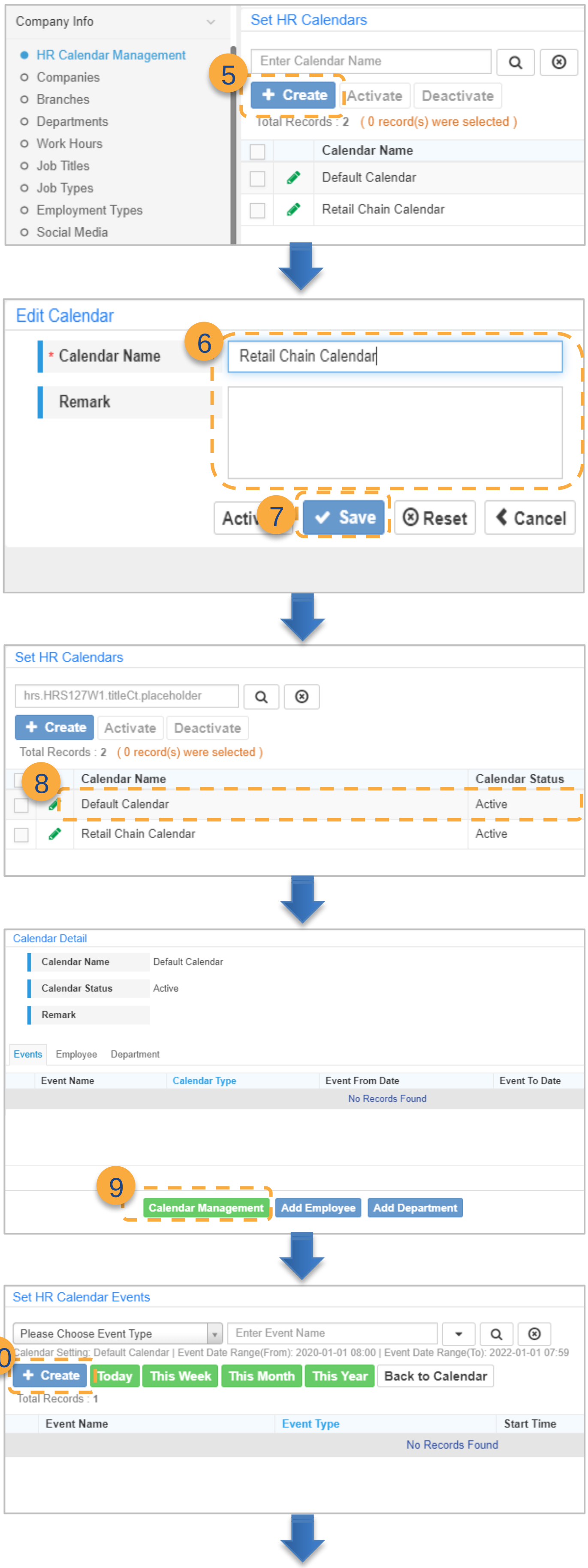
One HR calendar

1 ▸ Click HR Calendar Management.

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

3 ▸ Use the Remark field if necessary.

4 ▸ Click Save to finish.



Multiple HR calendars

(Skip to Step 8 if only one HR calendar is used)

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.

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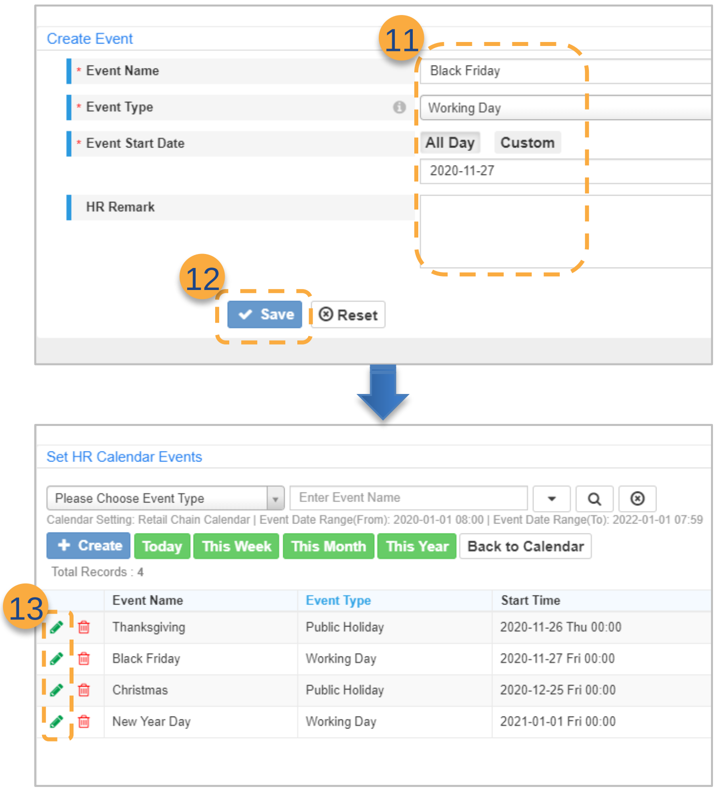
Set HR Calendar Events

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.

Event Editing

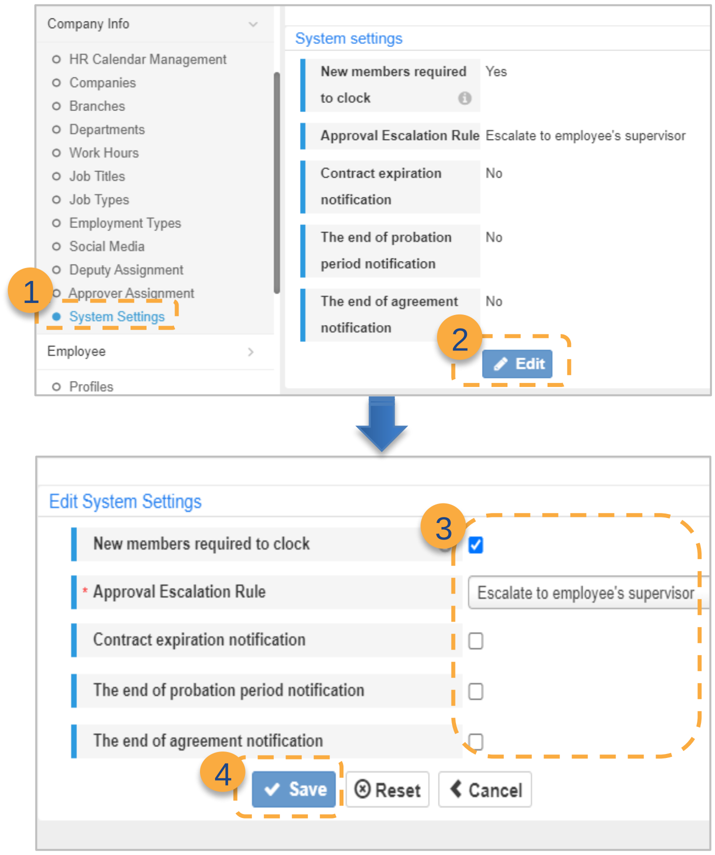
13 ▸ Click the Edit icon to edit an event.

e. System Settings

HR serves as the backbone of WorkDo, it is interconnected to many of the advance tools, one of which is the Attendance tool. This section will explain the details of setting up whether employees are required to clock-in/out for work, if this is not required in your organization, feel free to skip this section.

The New Members Required to Clock option is disabled by default, meaning newly onboard employees are not required to clock in/out for work. However, this setting will not affect the preexisting employees when it is enabled. You will have to manually adjust the setting using the Attendance tool.

Follow the instructions below if you would like new employees to clock in/out for work from this point on.



1 ▸ Click System Settings.

2 ▸ Click the Edit button if the default setting does not fit your company policies.

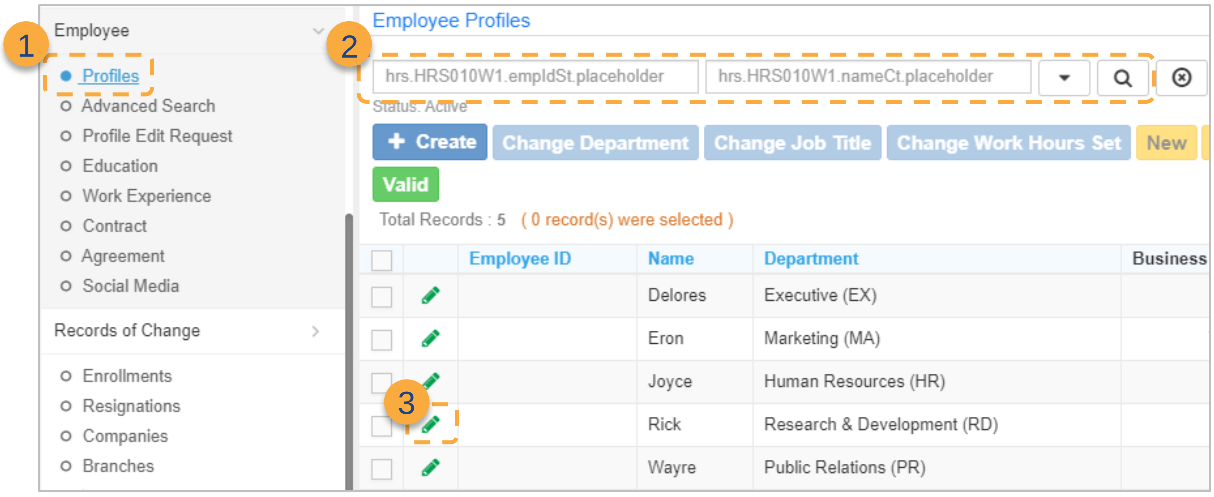
3 ▸ Make the adjustment.

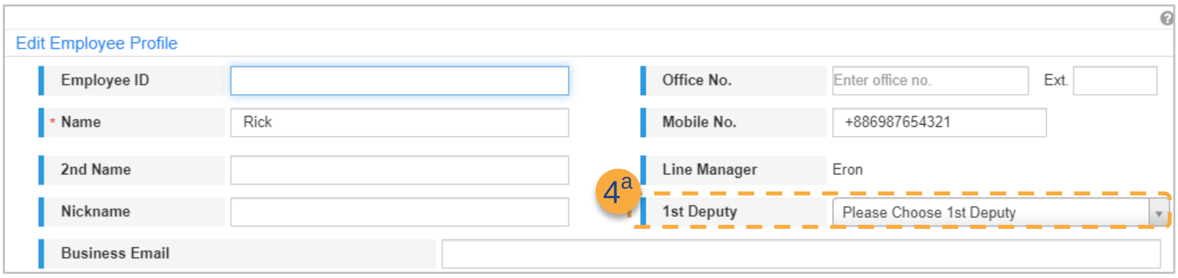
4 ▸ Click Save to finish. All newly onboard employee will automatically require to clock in/out/

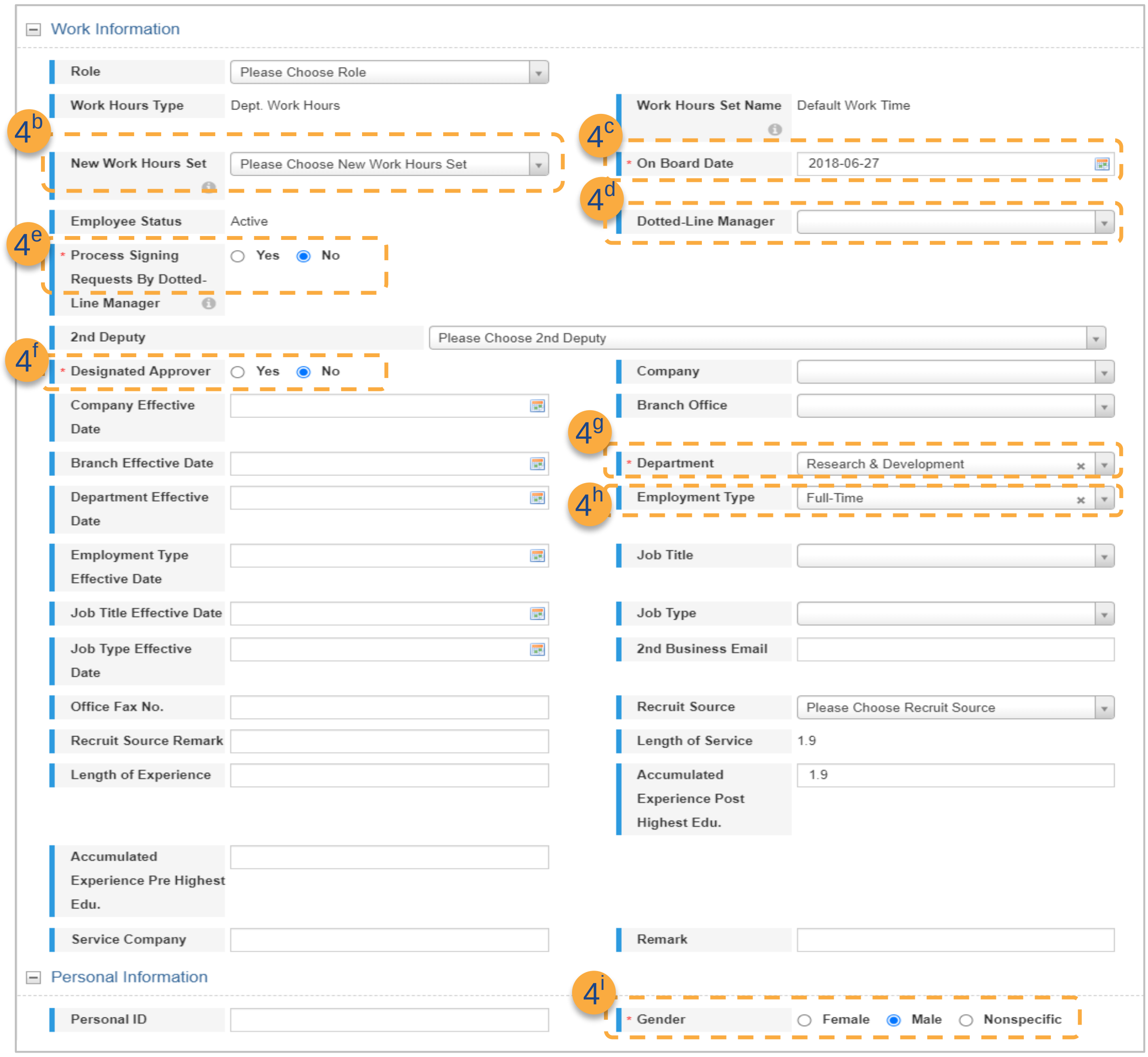
f. Manage Employee Profiles

An employee profile is created in the HR tool whenever a new employee joins a workplace in WorkDo. Settings such as work hours, onboard date, department, employment type, deputy, manager, and dotted-line manager, etc. can all be found in the employee profiles; these settings directly affect how other advanced tools behave and operates for each employee.

Follow the instructions below to edit the settings of each employee.







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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[7].

a. First and second deputies: When the first deputy is unavailable, the second deputy will be informed.
b. Work Hours: Adjust accordingly.
c. On Board Date: Used to determine employee tenure for leave granting.
d. Dotted-Line Manager: The deputy manager. Can be skipped if it is not needed.
e. Process Signing Requests by Dotted-Line Manager: Select Yes, if the employee requests need to be signed off by a dotted-line manager.
f. Designated Approver: If yes, then the employee can be chosen to sign off approvals and expenses.
g. Department: This affects the approval process.
h. Employment Type: This affects the eligibility of certain leaves and Overtime applications.
i. Gender: This affects the eligibility of certain leaves.

5 ▸ Click the Save button on the button of the page.

6 ▸ After the success message, the system will return to the previous page, you can then check for accuracy.

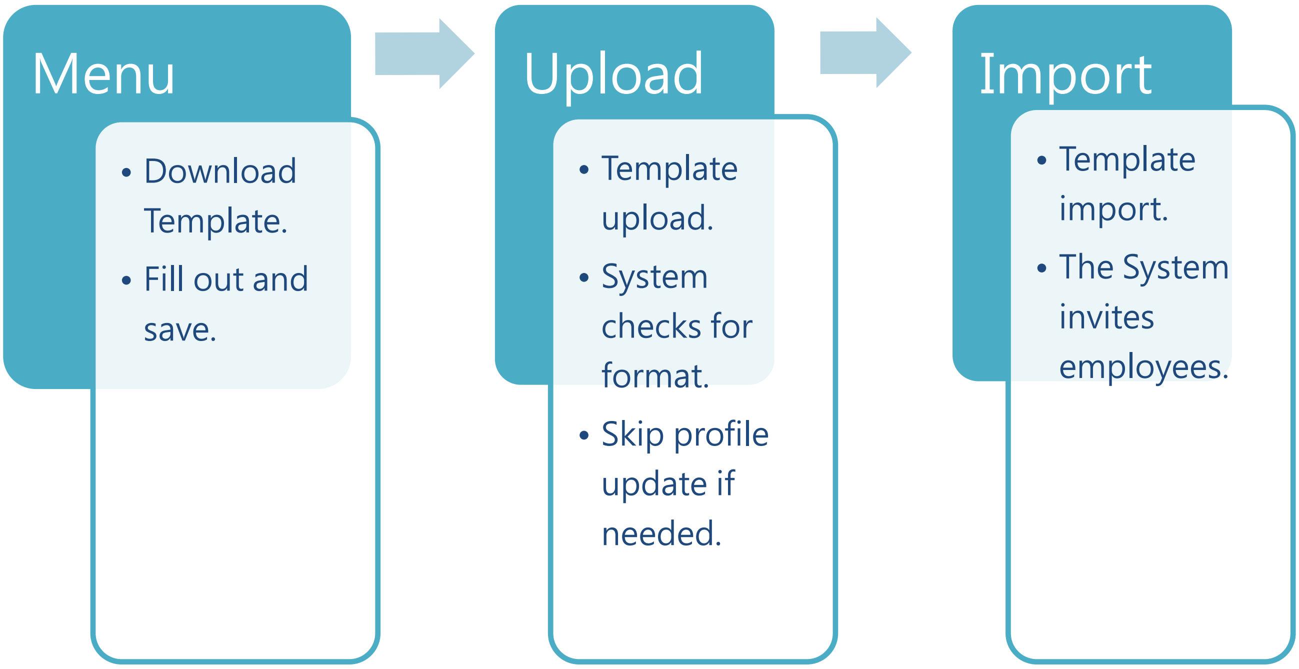
- ➲ If you are in the trial period or your workplace has 30 members or less, we recommend you follow the steps in the Manage Employee Profiles.
- ➲ If your workplace exceeds 30 members or you are fairly familiar with WorkDo, please follow the steps in Advanced: Batch-Import Employee Profiles.

[7] Only the options that have an effect on the advanced tool are listed.

g. Advanced: Batch-Import Employee Profiles

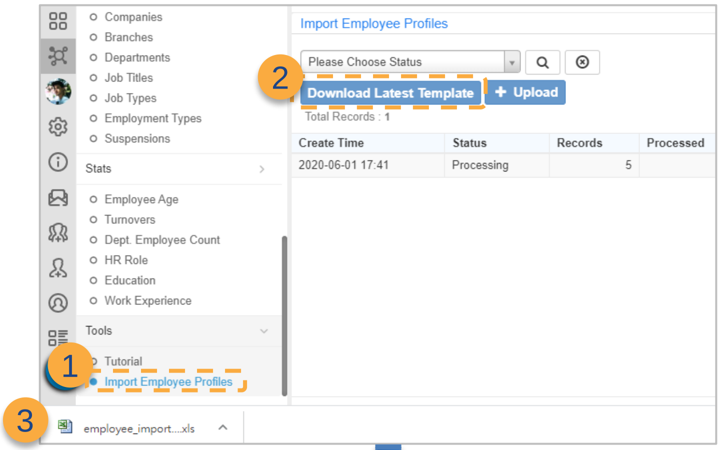
This section offers the advanced setting that we recommend you use if you are fairly familiar with WorkDo. Please complete Step 2 all the way up to Step 2-e then follow the steps below to batch-import multiple profiles at once.

The batch-import profiles function requires you download the template WorkDo provides. The sample will contain profiles of existing employees. After adjusting and adding new profiles, upload the template back to the system as demonstrated below.



▲ Image STEP 2-g Batch-Import Profile Process

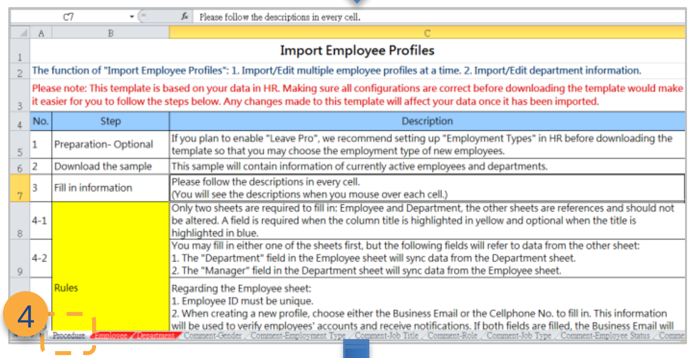
Let' s get started on batch-importing employee profiles, shall we?



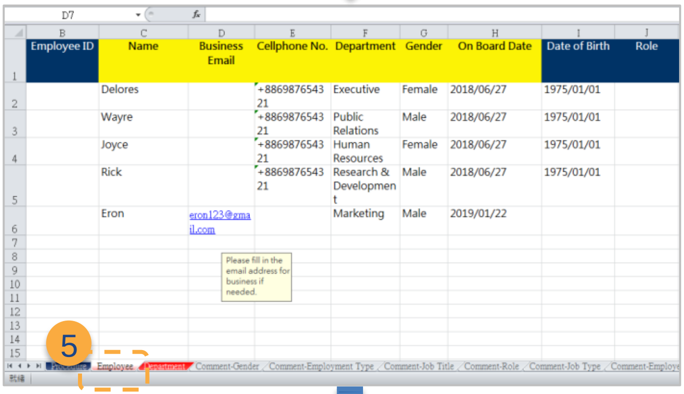
1 ▸ Click Import Employee Profiles.

2 ▸ Download Latest Template.

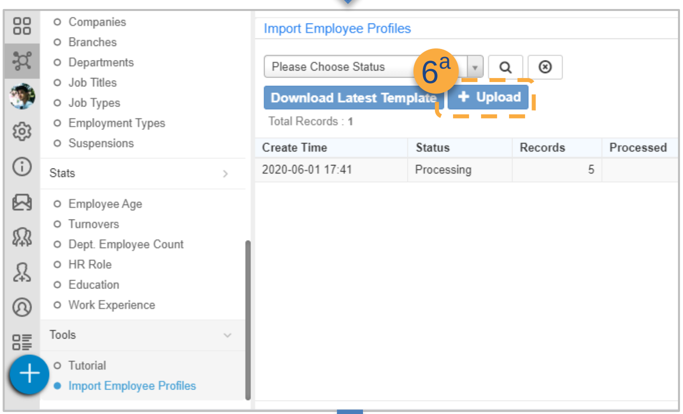
3 ▸ Open the file.



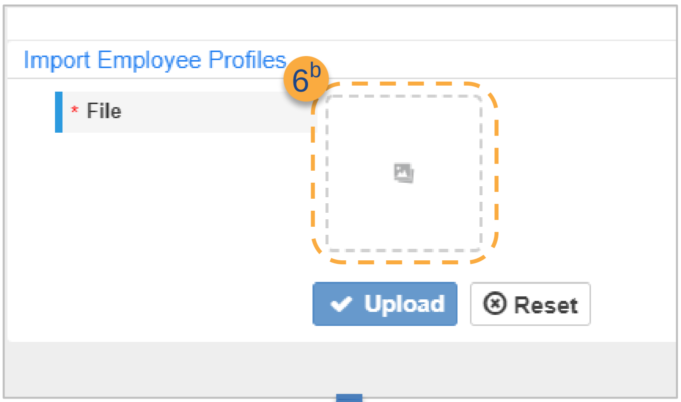
4 ▸ Please carefully read the description on how to correctly fill out the information fields.

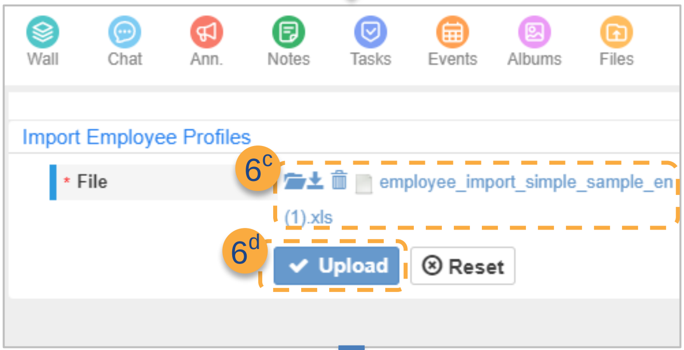


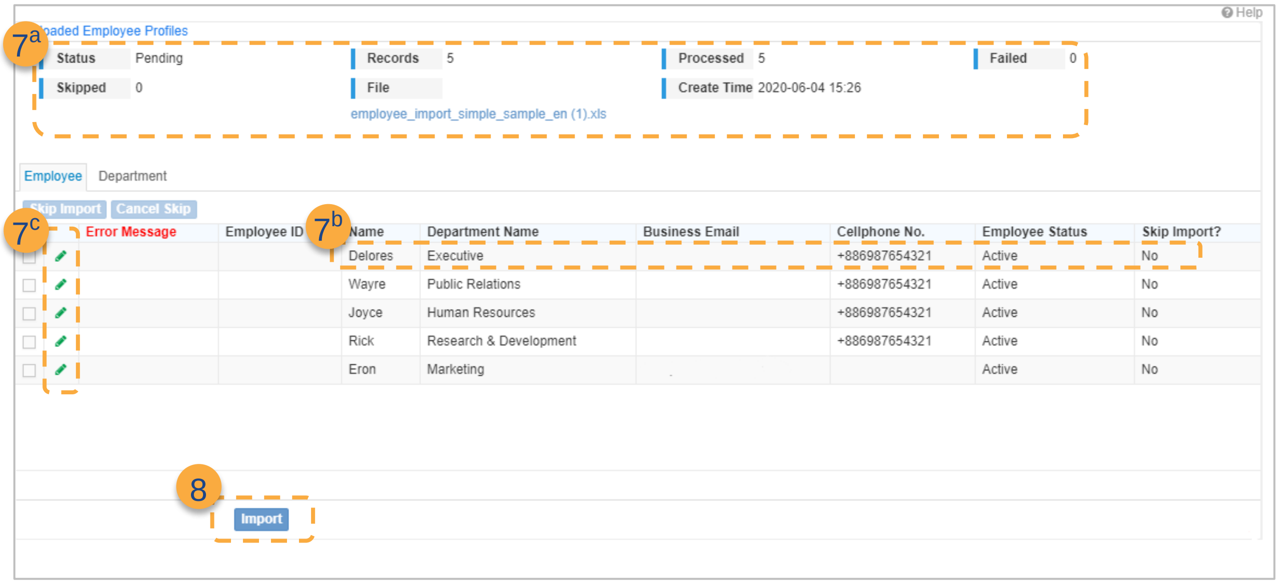
5 ▸ Click the Employee tab and fill in the information as instructed. The file name can be edited.



6a ▸ Click + Upload.







6[b] ▸ Select the file for upload.

6[c] ▸ Make sure the correct file is selected.

6[d] ▸ Click Upload.

7 ▸ Check the data uploaded.

a. Is the number of employee profiles correct?

b. Click to enter into detailed view.

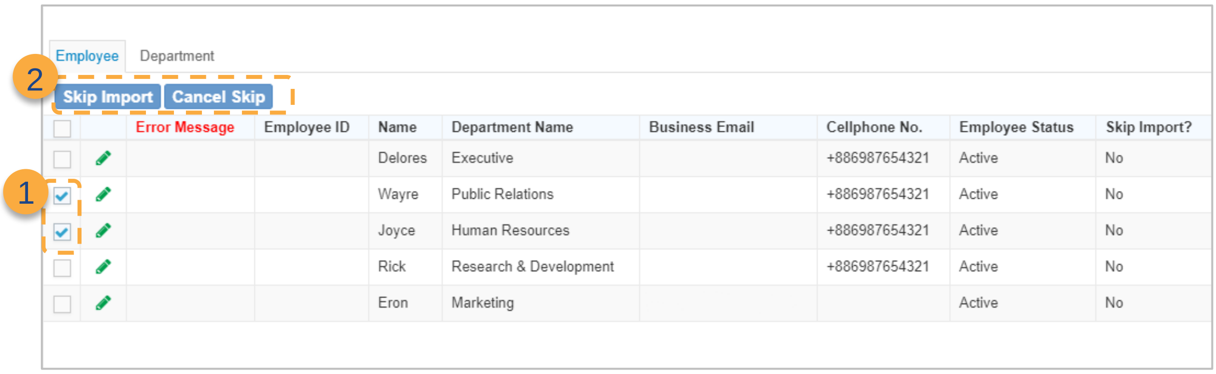
c. Click the Edit icon to edit information as needed.

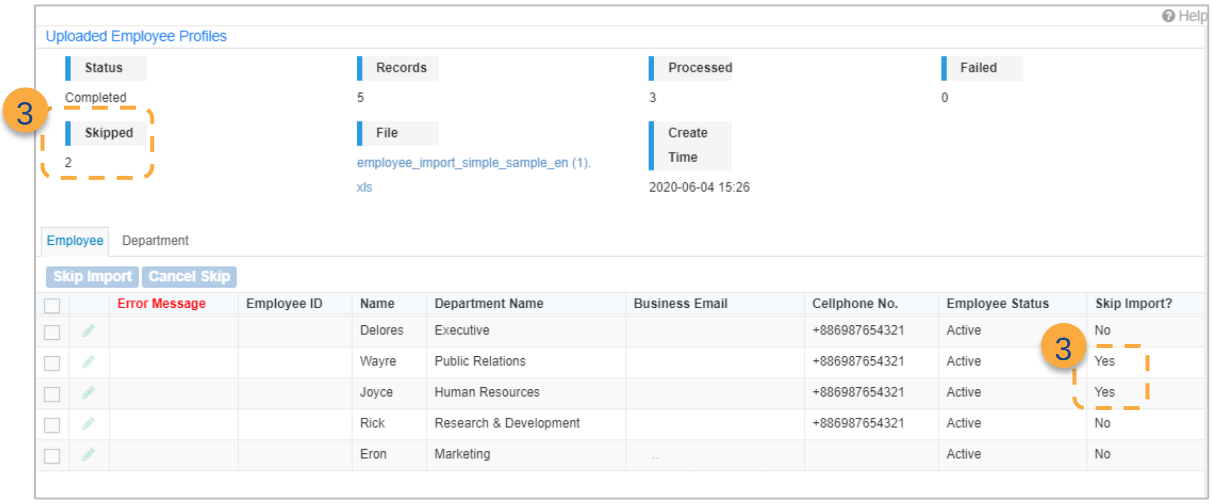
8 ▸ Click the Import button and wait for the success message. Once finished, the system will send invites to the employees.

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

- ## Omit Employee Profiles from Importing

  Some profiles may not need to be imported (such as existing member profiles).

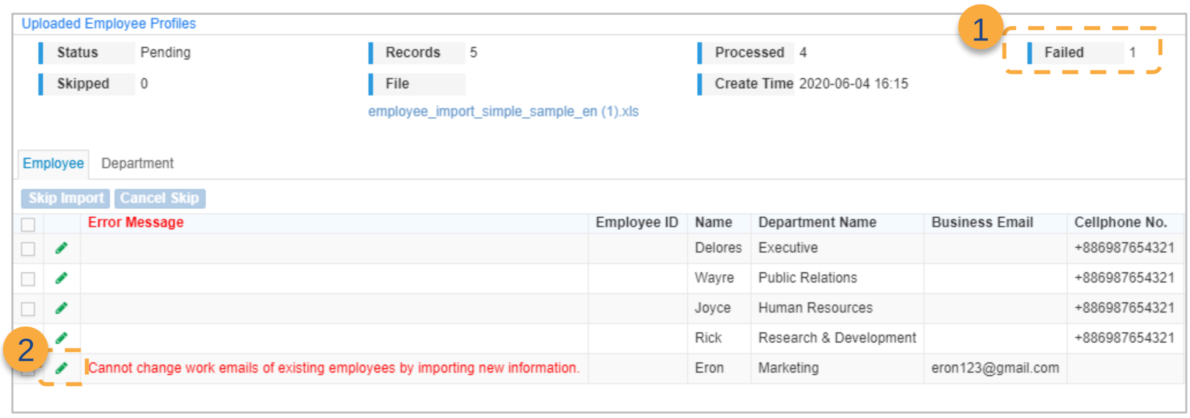


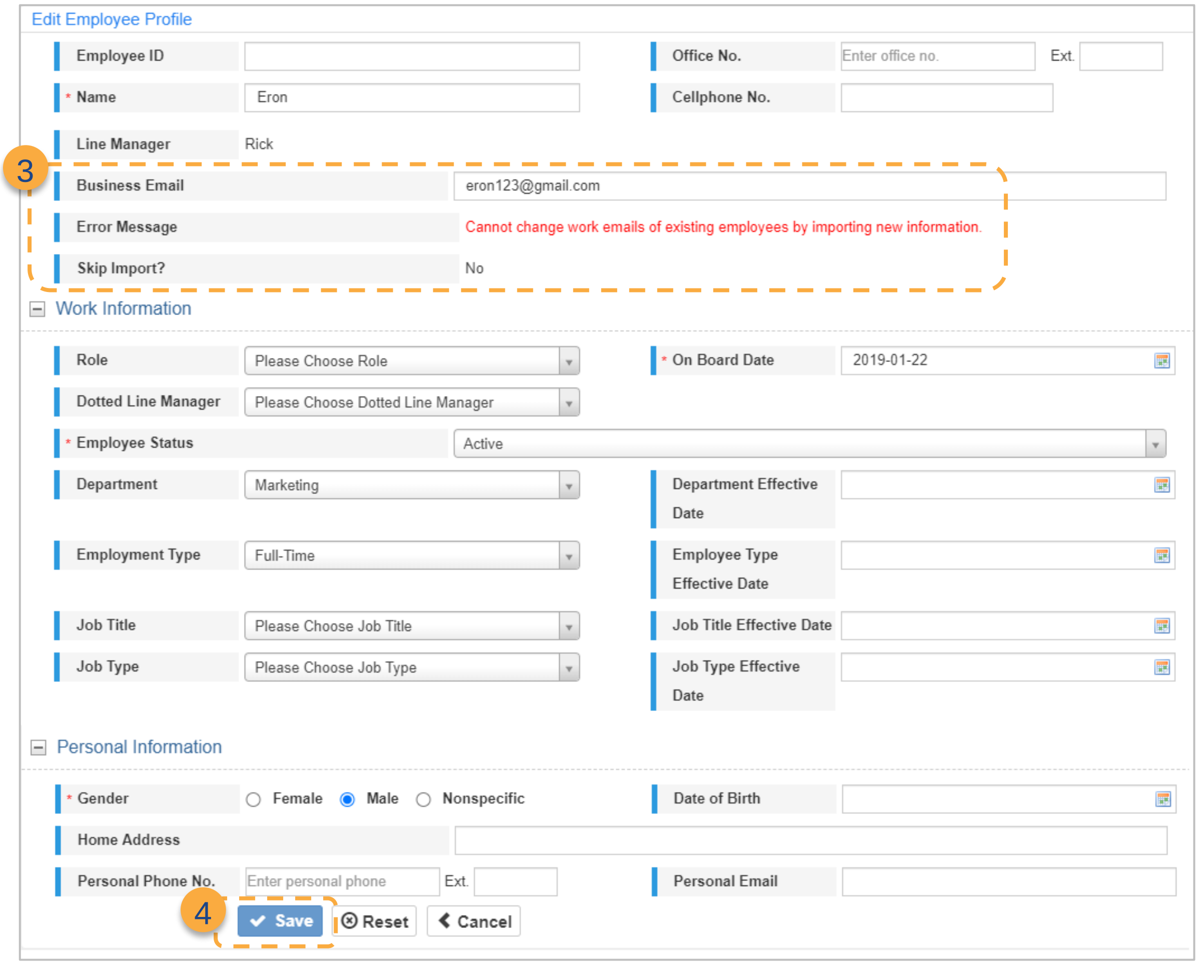


1. ▸ Use the check boxes to select the profiles.
2. ▸ Choose Skip Import or Cancel Skip.
   a. Click Skip Import for existing profiles, the import function will not import these profiles.
   b. Click Cancel Skip to undo Skip Import.
3. ▸ Skipped profiles will be shown after the import, if you wish to import the skipped profiles, please resume from steps 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 in the profile page.





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

1. ▸ The number of invalid formatting and duplicated profiles will be displayed in the record.
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.

Start

More tutorials coming soon.

We recommend you enable to the use of Leave, Overtime, Expenses and etc. and enjoy the convenience WorkDo brings to your workplace!