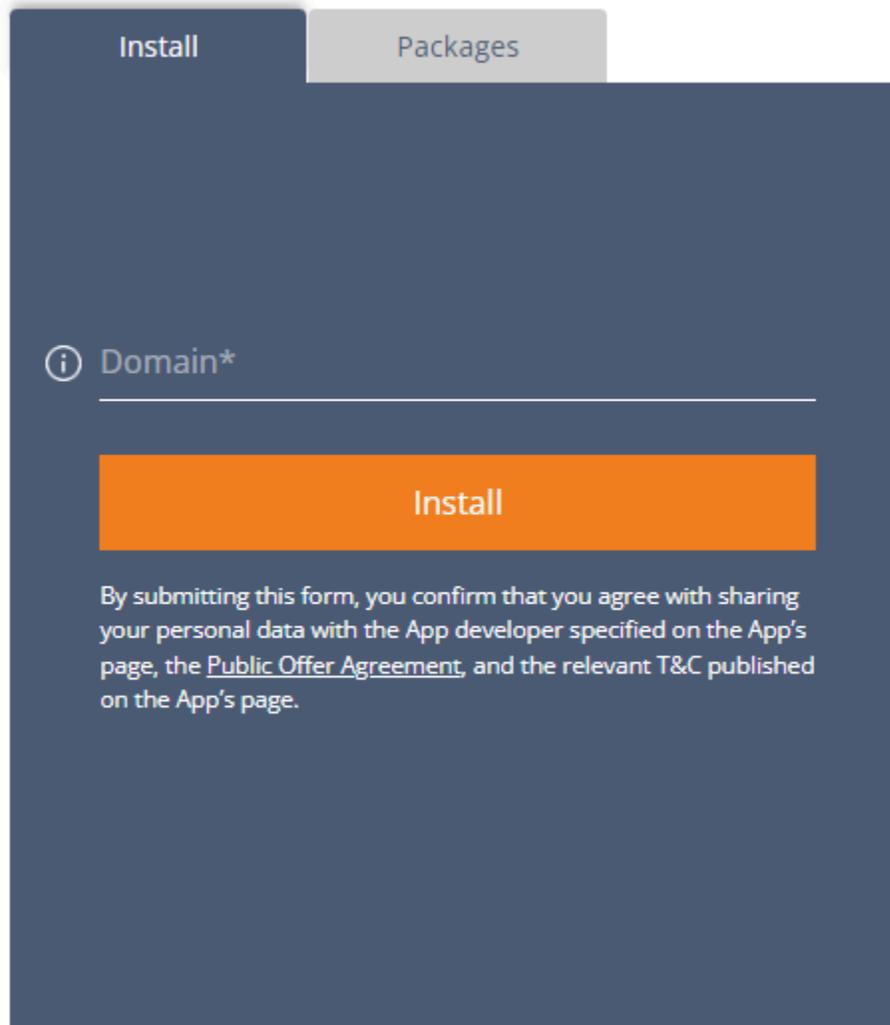


Installation and setup

Installing the Workday Tracker app has a standard procedure:



The screenshot shows a dark blue interface with two tabs at the top: 'Install' (active) and 'Packages'. Below the tabs is a form with a label 'Domain*' and an information icon. A large orange 'Install' button is centered below the form. Below the button is a paragraph of text: 'By submitting this form, you confirm that you agree with sharing your personal data with the App developer specified on the App's page, the Public Offer Agreement, and the relevant T&C published on the App's page.'

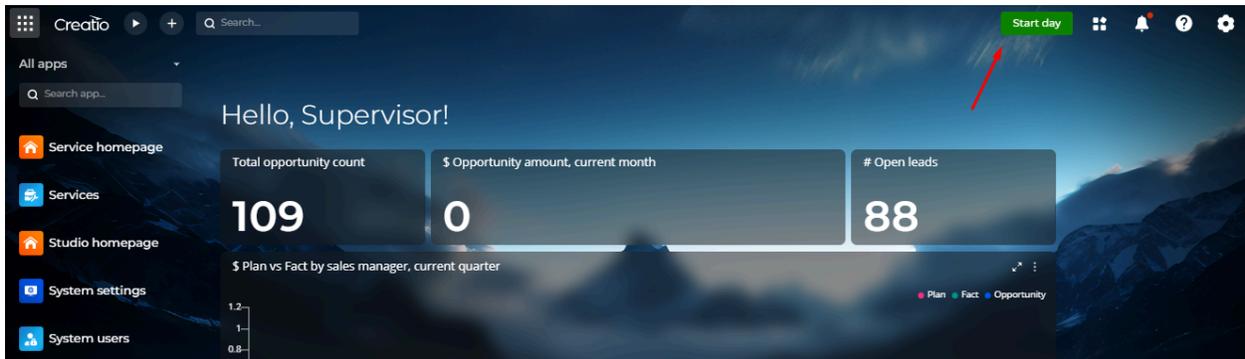
To install the application, paste the link to your website and click **Install**.

After installing the application, it is advisable to run the full generation and compilation.

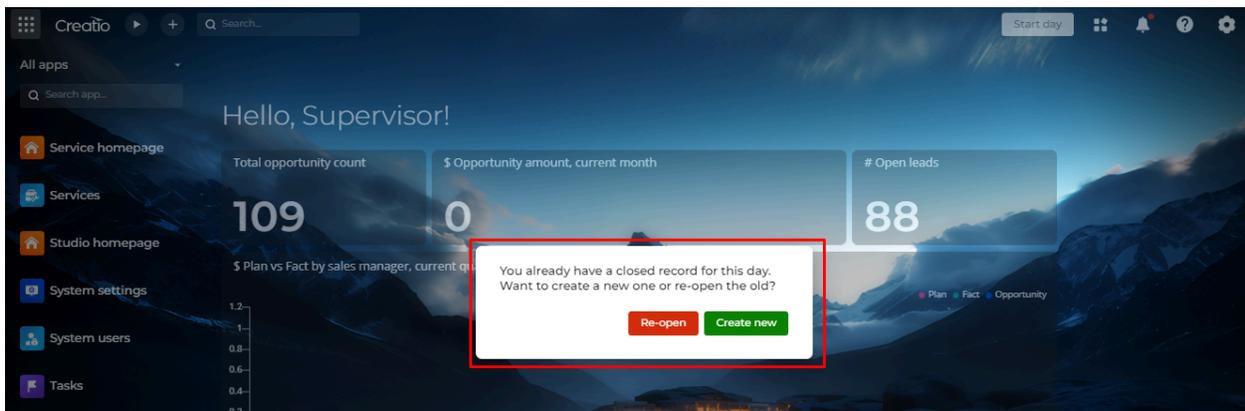
Getting started with the Workday Tracker app

For the users:

- At the beginning of the working day after logging in to CRM, click the "Start day" button

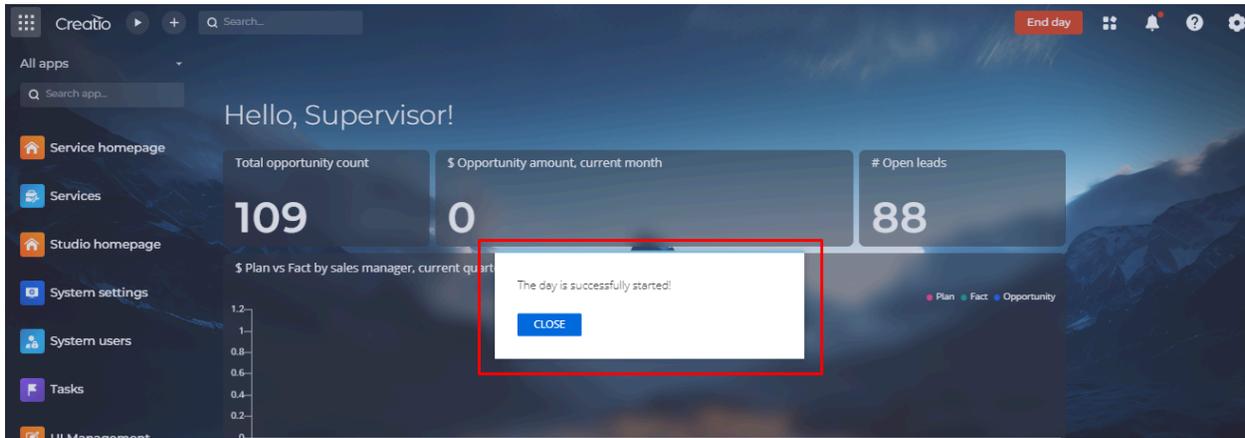


- If your workday consists of several segments, you will see the following notification after clicking the Start Day button:

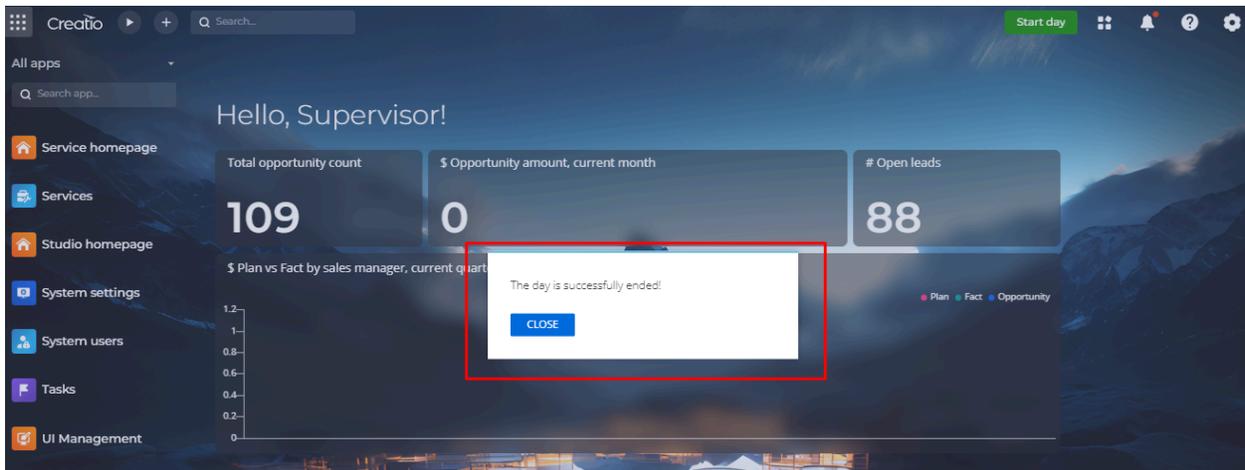


- When you click on the "Re-open" button, you will continue your previous working time record.
- By clicking on the "Create new" button, you will start a new working day.

- When you click the Start Day button, if your working day does not consist of several segments, you will receive the following notification:

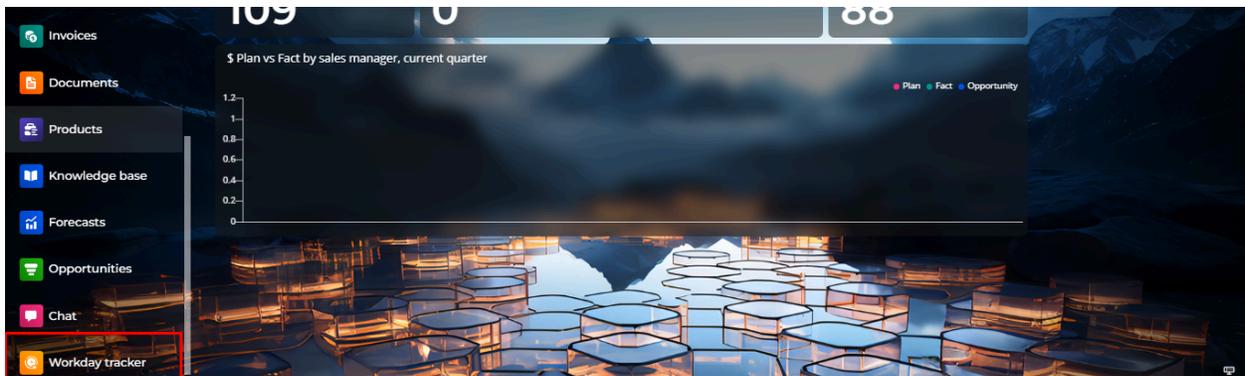


- Similarly, when your working day is over, when you click the "End Day" button, you will receive the following notification:



For executives:

- To go to the Workday Tracker section, click on the corresponding section in CRM:



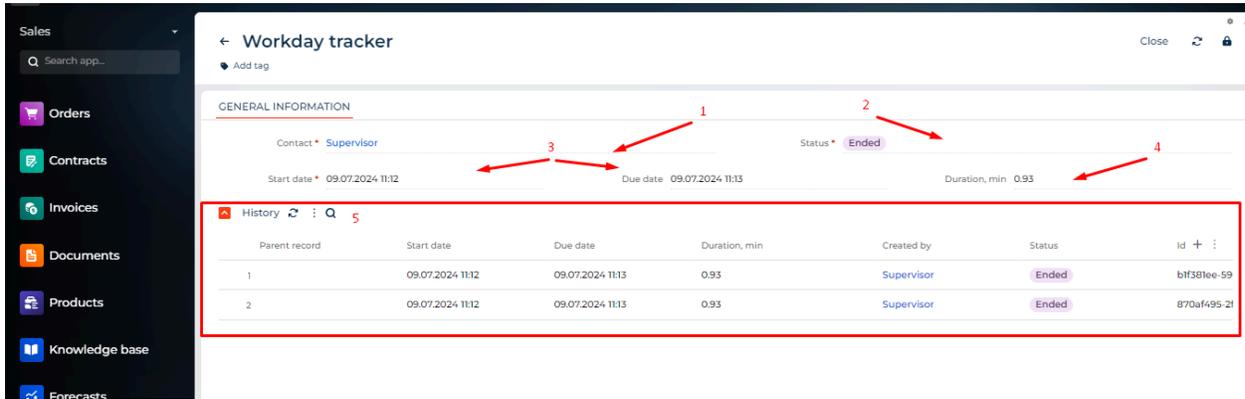
- In this section, you will see all the records of your employees' working hours:

Created on	Created by	Start date	Duration	Due date	Created on
09.07.2024 11:12	Supervisor	09.07.2024 11:12	0.93	09.07.2024 11:13	09.07.2024 11:12
09.07.2024 11:10	Supervisor	09.07.2024 11:10	0.06	09.07.2024 11:10	09.07.2024 11:10
03.07.2024 11:57	Supervisor	03.07.2024 11:57	131.63	03.07.2024 16:56	03.07.2024 11:57
03.07.2024 10:10	Supervisor	03.07.2024 10:10	78.75	03.07.2024 11:56	03.07.2024 10:10
03.07.2024 9:39	Supervisor	03.07.2024 9:39	0.11	03.07.2024 10:10	03.07.2024 9:39
01.07.2024 11:36	Supervisor	01.07.2024 11:36	0.09	01.07.2024 11:36	01.07.2024 11:36
01.07.2024 10:44	Supervisor	01.07.2024 10:44	0.19	01.07.2024 10:57	01.07.2024 10:44
28.06.2024 15:26	Supervisor	28.06.2024 15:26	1,623.60	29.06.2024 18:30	28.06.2024 15:26
28.06.2024 15:12	Supervisor	28.06.2024 15:12	1.76	28.06.2024 15:14	28.06.2024 15:12
28.06.2024 15:12	Supervisor	28.06.2024 15:12	0.06	28.06.2024 15:12	28.06.2024 15:12

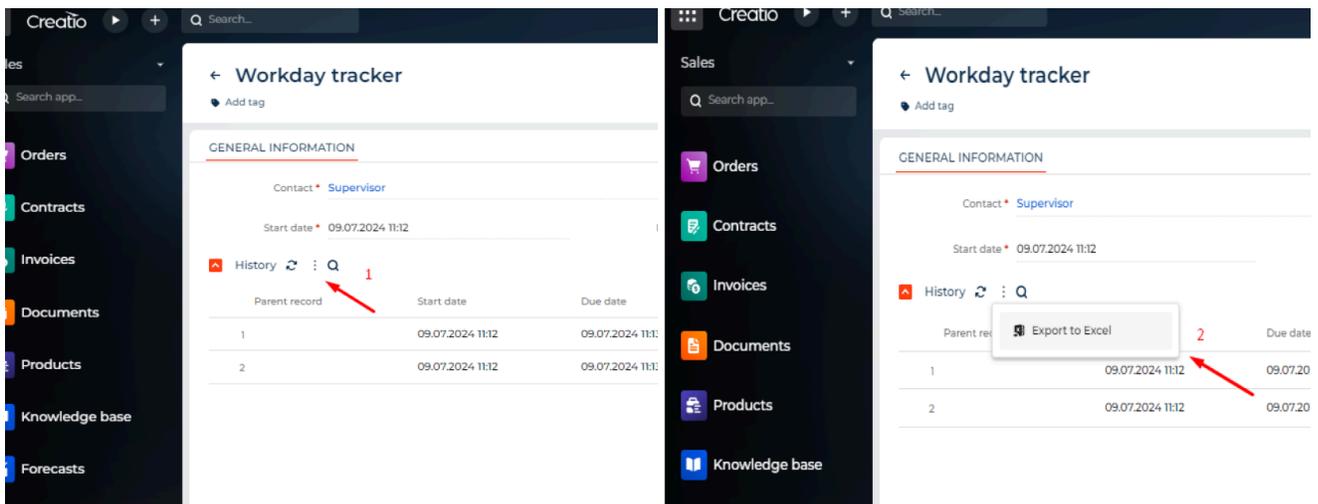
- To open a single record, click on the 3 dots in the left corner next to the date you selected.
- Select the action you want to take:
 1. Open
 2. Copy
 3. Delete

Created on	Created by	Start date	Duration	Due date	Created on
09.07.2024 11:12	Supervisor	09.07.2024 11:12	0.93	09.07.2024 11:13	09.07.2024 11:12
09.07.2024 11:10	Supervisor	09.07.2024 11:10	0.06	09.07.2024 11:10	09.07.2024 11:10
03.07.2024 11:57	Supervisor	03.07.2024 11:57	131.63	03.07.2024 16:56	03.07.2024 11:57
03.07.2024 10:10	Supervisor	03.07.2024 10:10	78.75	03.07.2024 11:56	03.07.2024 10:10
03.07.2024 9:39	Supervisor	03.07.2024 9:39	0.11	03.07.2024 10:10	03.07.2024 9:39
01.07.2024 11:36	Supervisor	01.07.2024 11:36	0.09	01.07.2024 11:36	01.07.2024 11:36
01.07.2024 10:44	Supervisor	01.07.2024 10:44	0.19	01.07.2024 10:57	01.07.2024 10:44
28.06.2024 15:26	Supervisor	28.06.2024 15:26	1,623.60	29.06.2024 18:30	28.06.2024 15:26

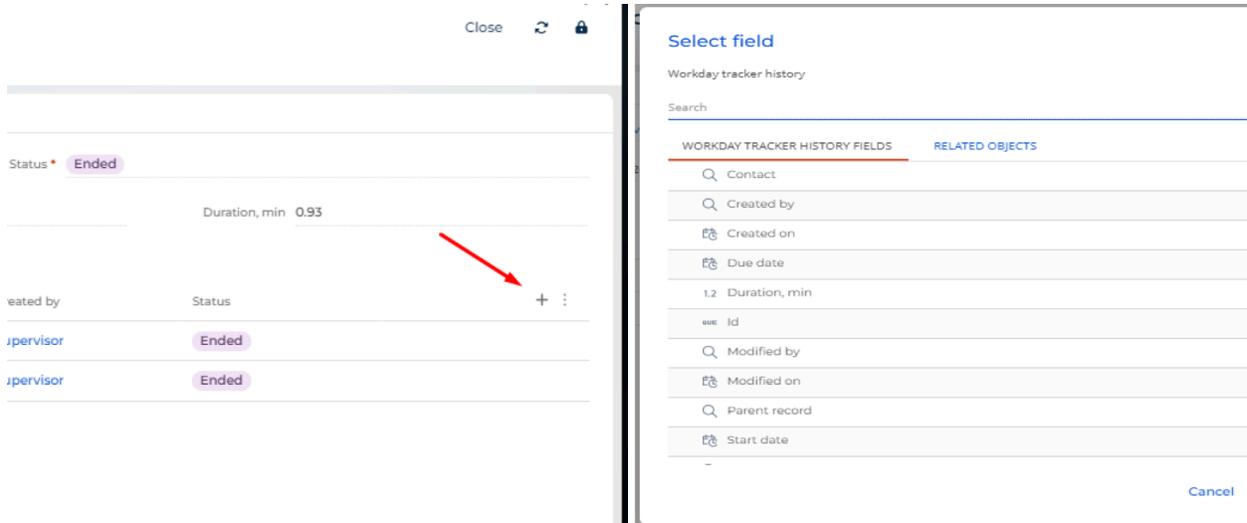
- When you open the selected record, you will see the page where it is:
 1. Contact
 2. Status
 3. Start and due date
 4. Duration, min
 5. History



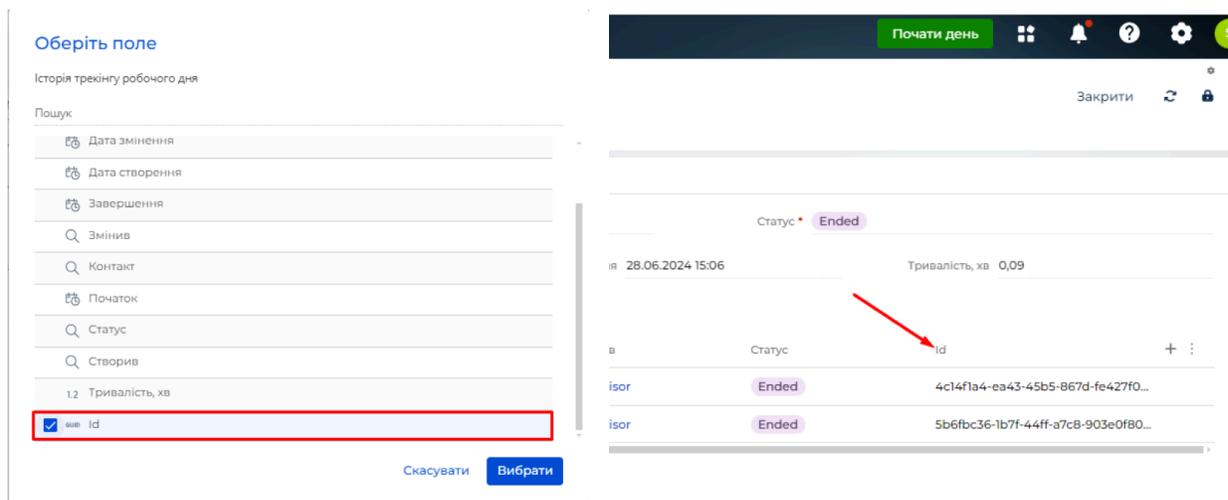
- You can export the time history to Excel:



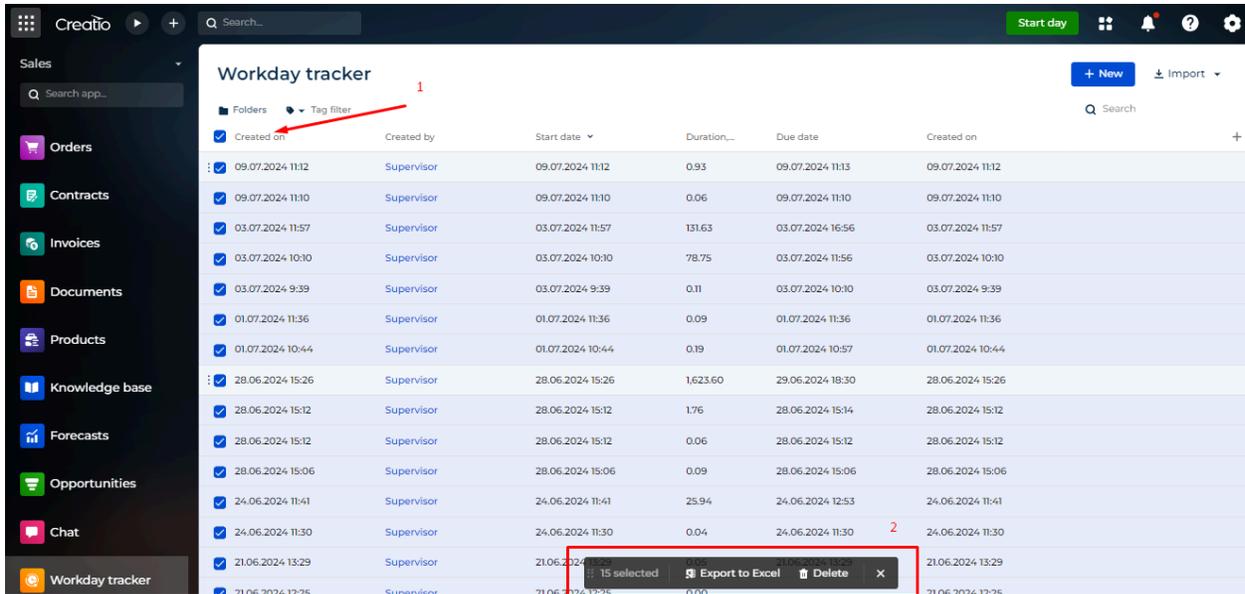
- If you need to add fields to your time tracking history, do the following:
 1. Click the “+” on the left side of the time tracking history table
 2. And select the required field from the menu that opens



- For example, select the ID field and click Select. The ID field appears in the tracking history.

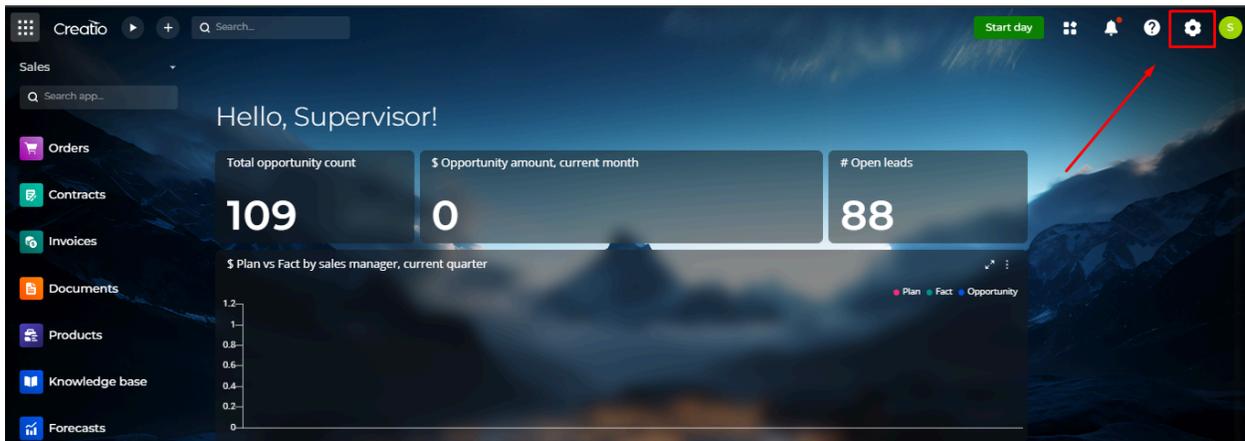


- To export/delete all records of the selected employee, follow these steps:
 - Select all records
 - Select the action you want to perform - Export/Delete

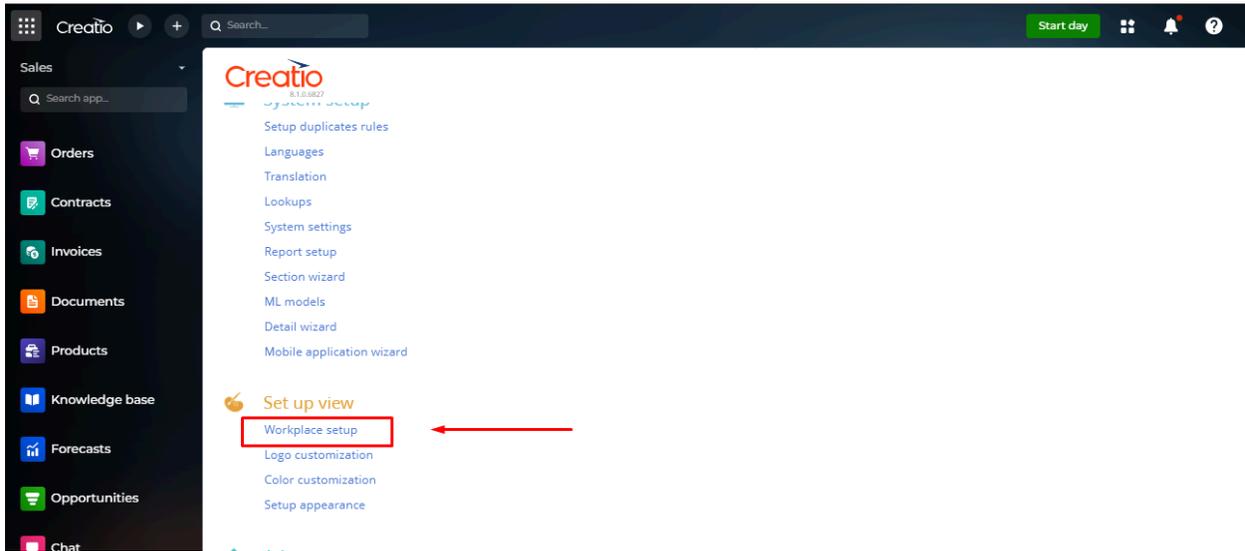


Configure access rights

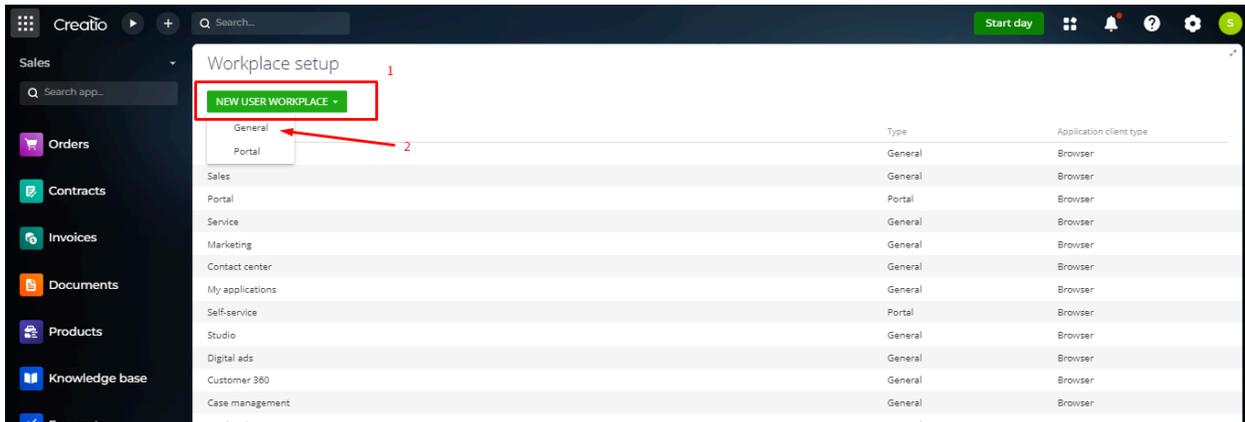
- To set up access to the section for selected employees/departments, go to the system designer:



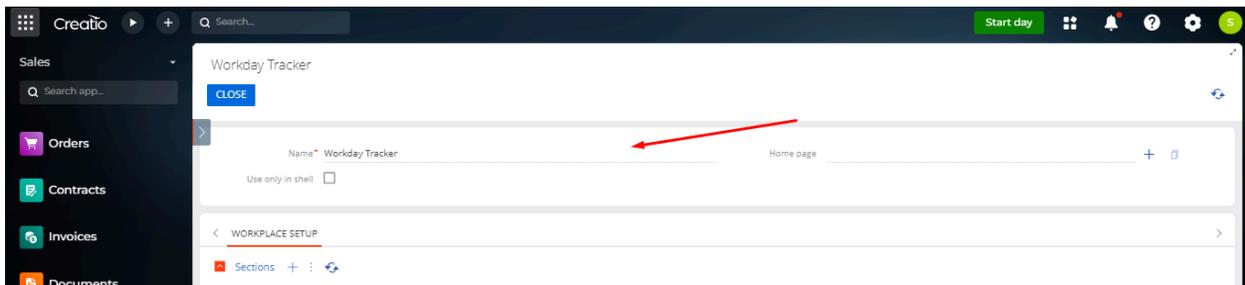
- Select Workplace setup:



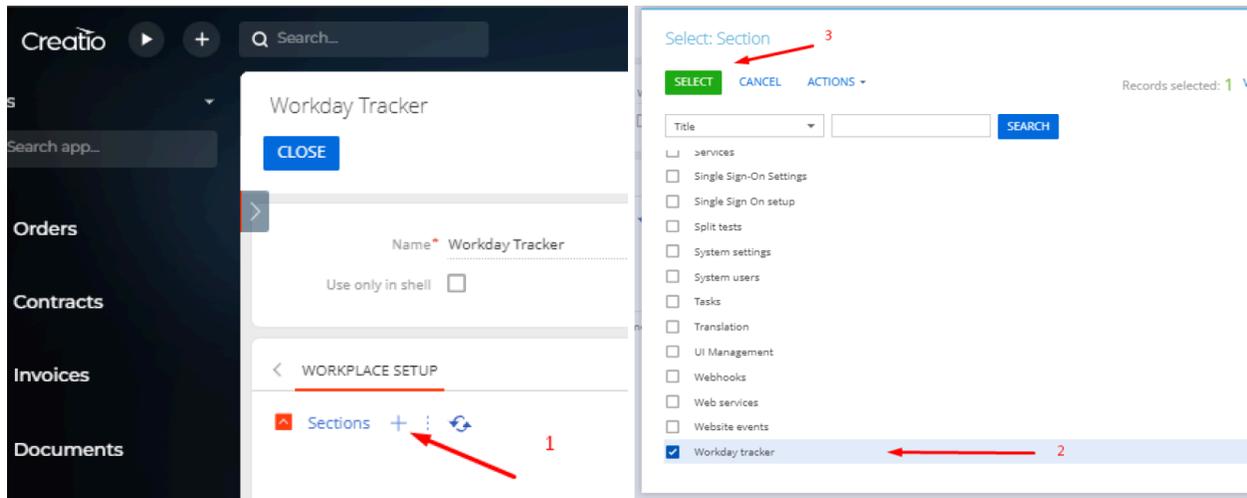
- Add a General workplace:



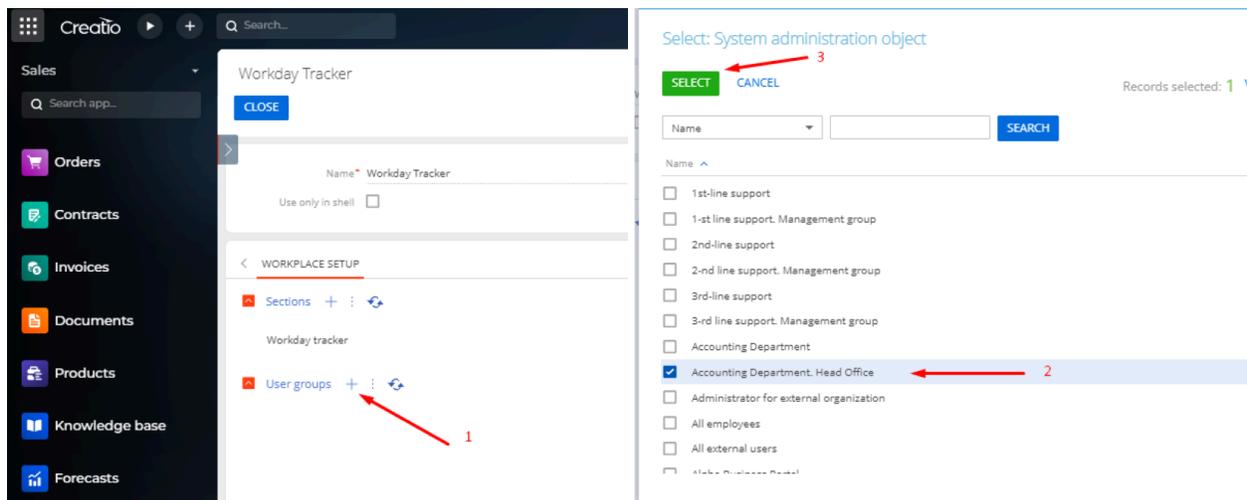
- Enter a name:



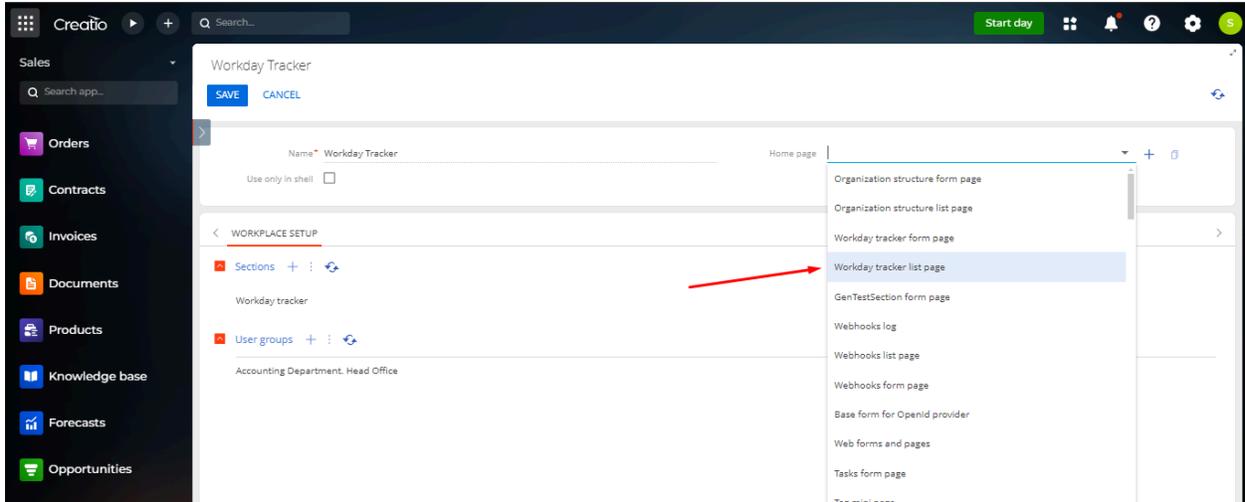
- Add a Workday tracker section:
 1. Click the + next to the Section field
 2. Check the box next to the Workday Tracker section
 3. Click Select



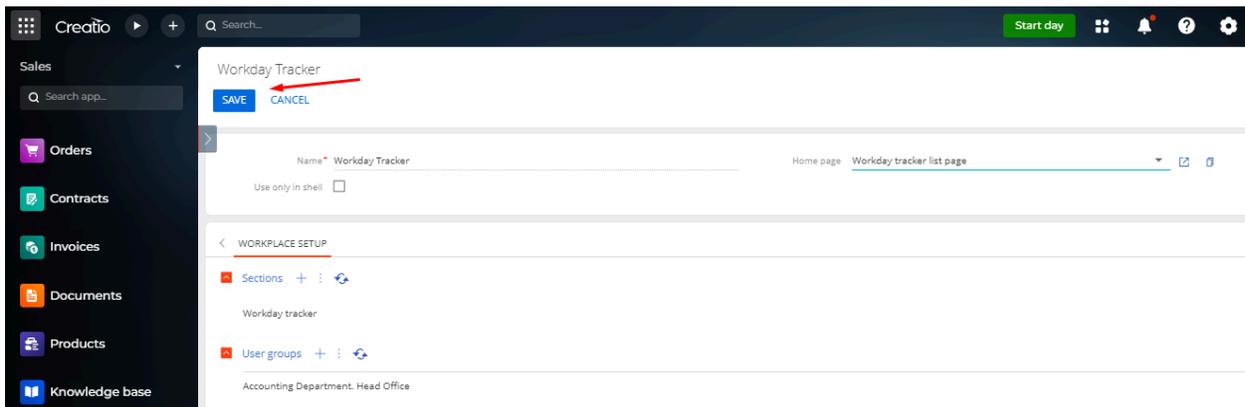
- Add a group of users who will have access to the Workday Tracker section:
 1. Click the + next to the User group field.
 2. Select the checkbox next to the user group you are granting access to. For example, Accounting Department. Head Office
 3. Click Select



- Select the home page:
 1. Click on the arrow to the right of the Home page name
 2. Select Workday Tracker list page

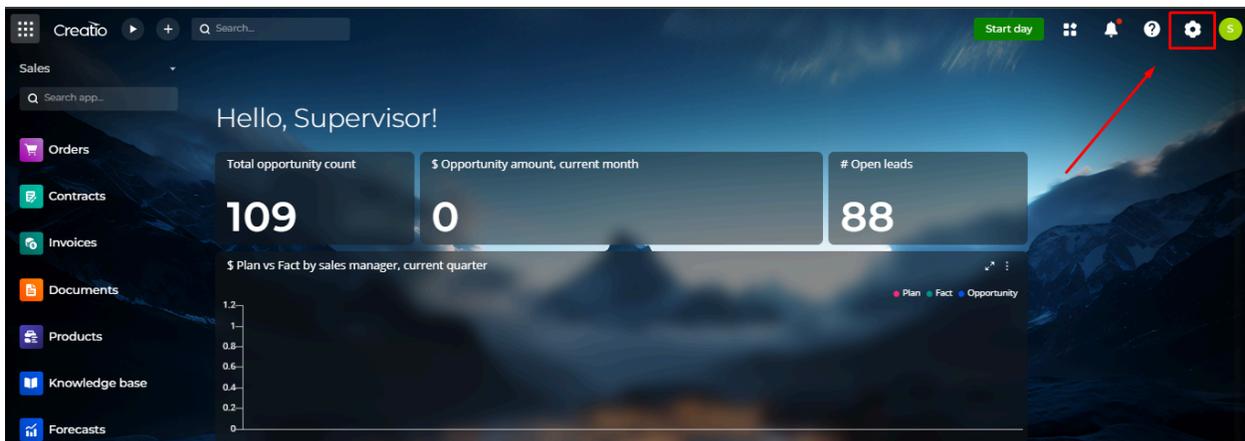


- Save the changes

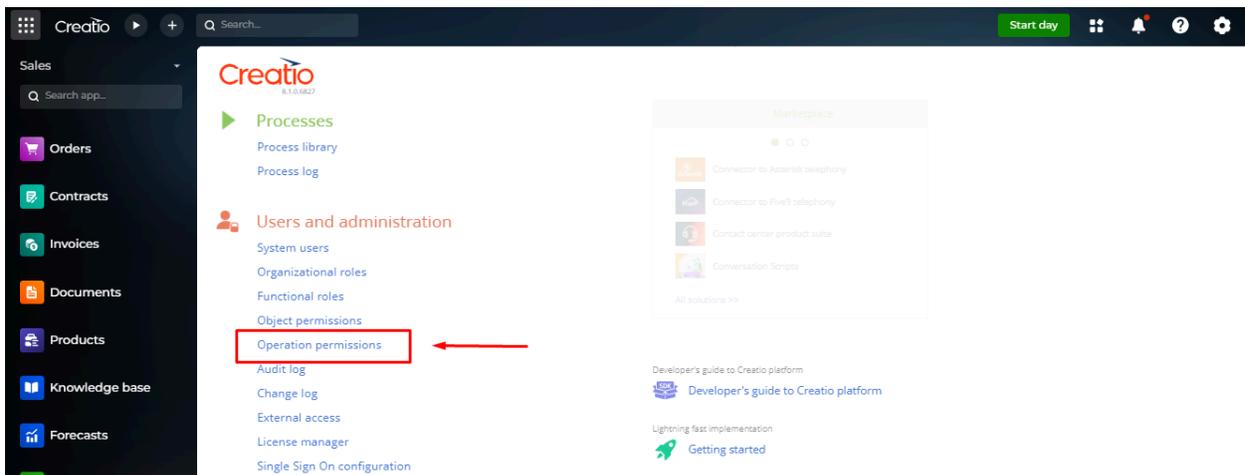


After making changes in the settings, it is necessary to re-authorize the system for those users for whom the changes were made.

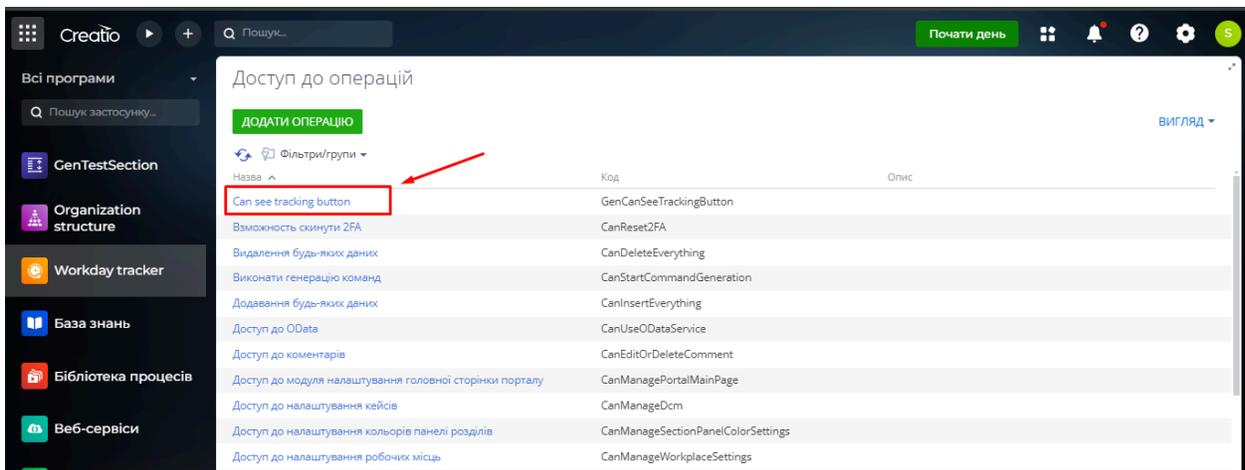
- To configure access to the Start/End Day button, go to the system designer:



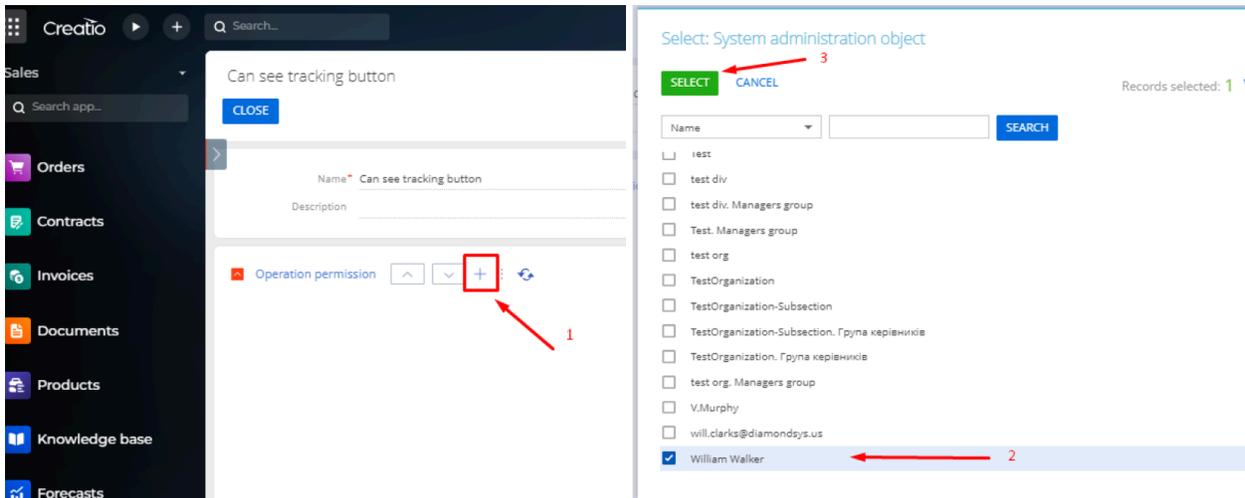
- Go to the Operations permissions section



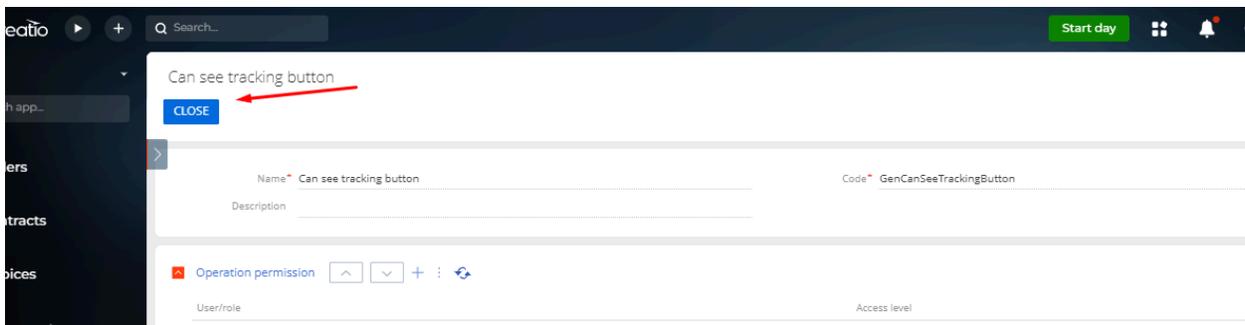
- Select the Can see tracking button option from the list:



- Select the user or group of users to whom you want to grant access to the Start/End Day button:
 1. Click the + next to the Operations permission.
 2. Select the checkbox next to the name of the user or group of users you want to grant access to. For example, William Walker.
 3. Click Select



- Click Close



After making changes in the settings, it is necessary to re-authorize the system for those users for whom the changes were made.

Task time-tracking

The button “**Start work**” is visible for created activities and only for participants of this activity in case they have permission for the operation “**Can see tracking button for activities**” (GenCanSeeActivityTrackingButton)

When a user starts working on an activity, the status of the activity changes to "In progress".

When it completes, the statuses do not change

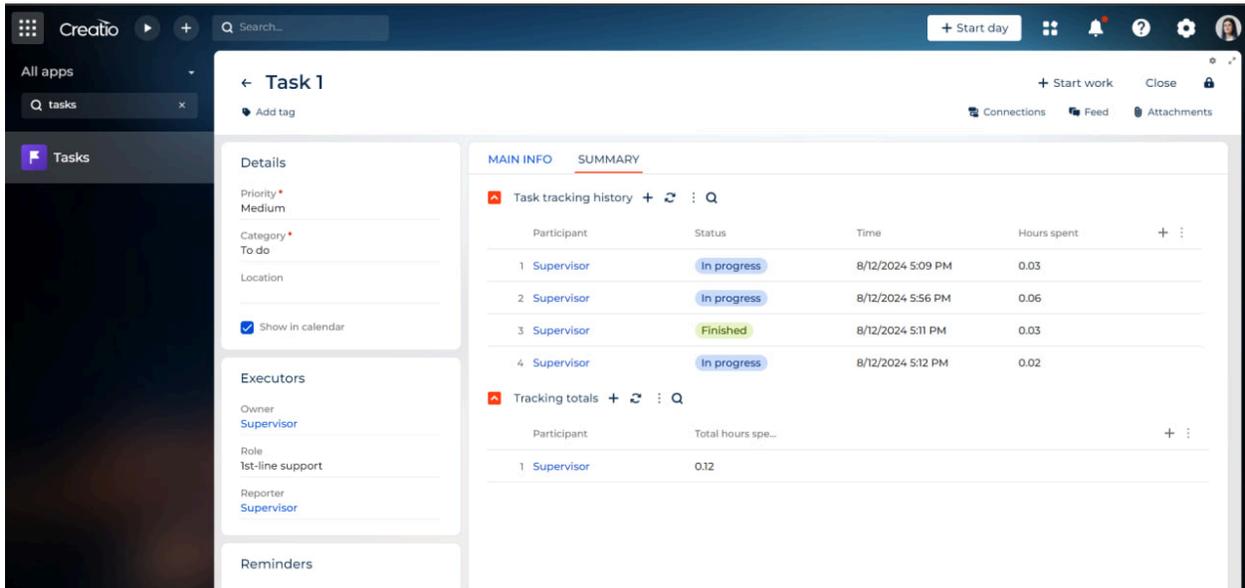
Information on who performed is displayed on the Summary tab.

There are two details:

- the first: every time someone starts or ends a work

Once completed, the time (completion - start) in hours is additionally calculated and recorded in both records

- second: total working time for each user



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