# User Guide

## New Overtime

### E-Signature

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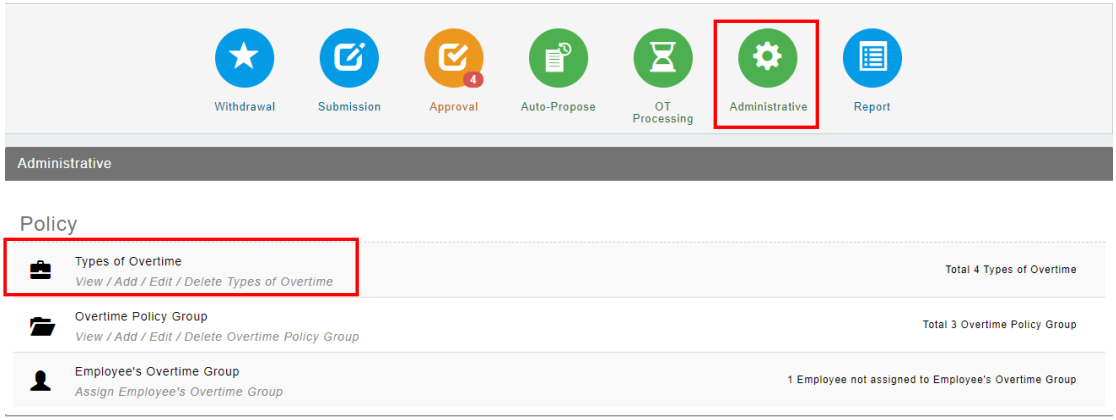
# E-SIGNATURE SETUP

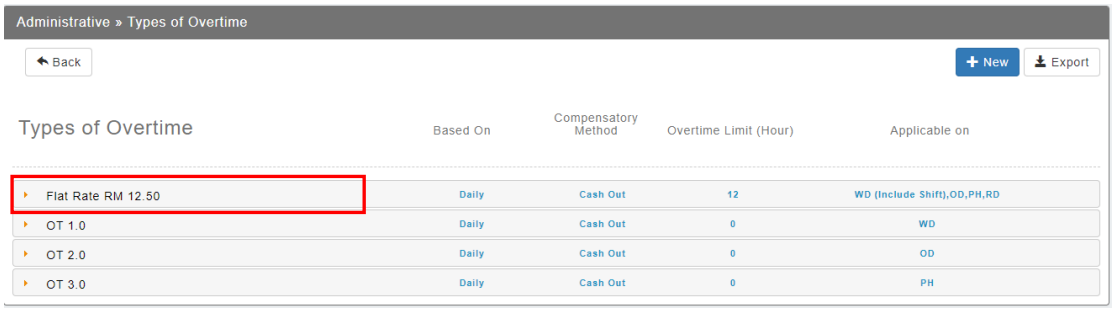
To enable e-signature feature, e-signature policy must be turned on in Overtime Setup

## 1.1. Enable E-Signature for Overtime Policy Group

1. Under the toolbar Menu, look for **Administrative** Tab, then select "**types of overtime**".




2. Click on type of overtime to edit/delete




3. Under policy tab, there are 2 types of control for e-signature feature.

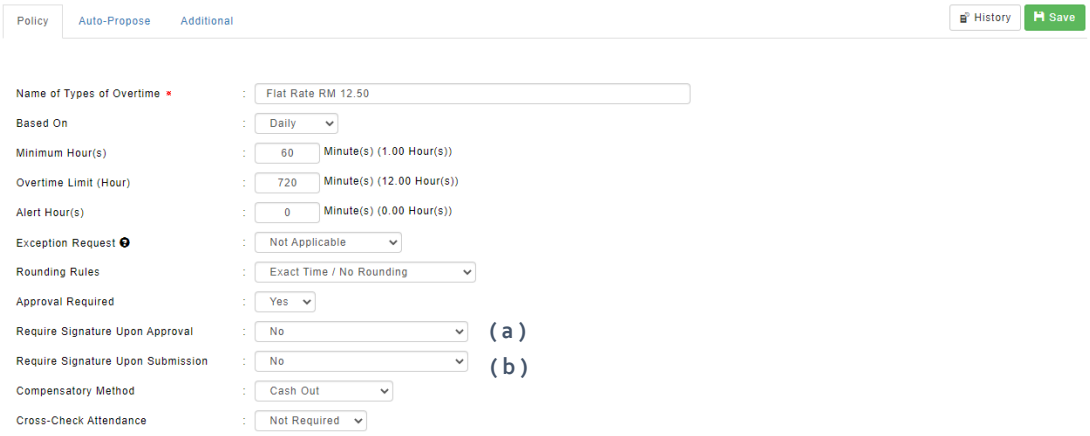
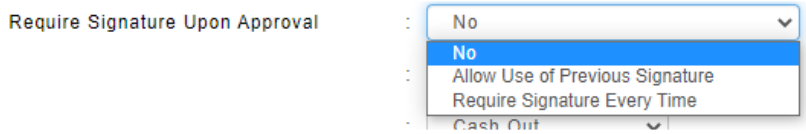


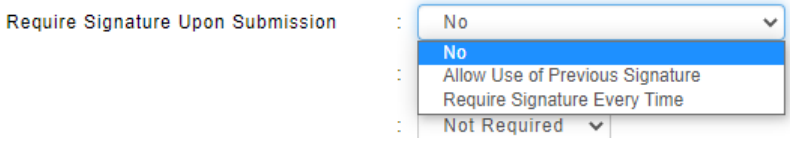

***Figure 1.1***

Refer to Figure 1.1

(a) **Require Signature Upon Approval** – enable e-signature feature for overtime approval, only if approval is required

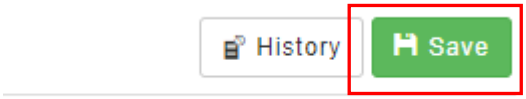



(b) **Require Signature Upon Submission** – enable e-signature feature for overtime submission




- **No** – No Signature is required on overtime submission/approval
- **Allow Use of Previous Signature** – Signature is needed on first overtime submission/approval. Previous signature used in submission/approval can be applied to subsequent overtime submission/approval.
- **Require Signature Every Time** – Signature is required on every overtime submission/approval

4. Click on save button to save changes.

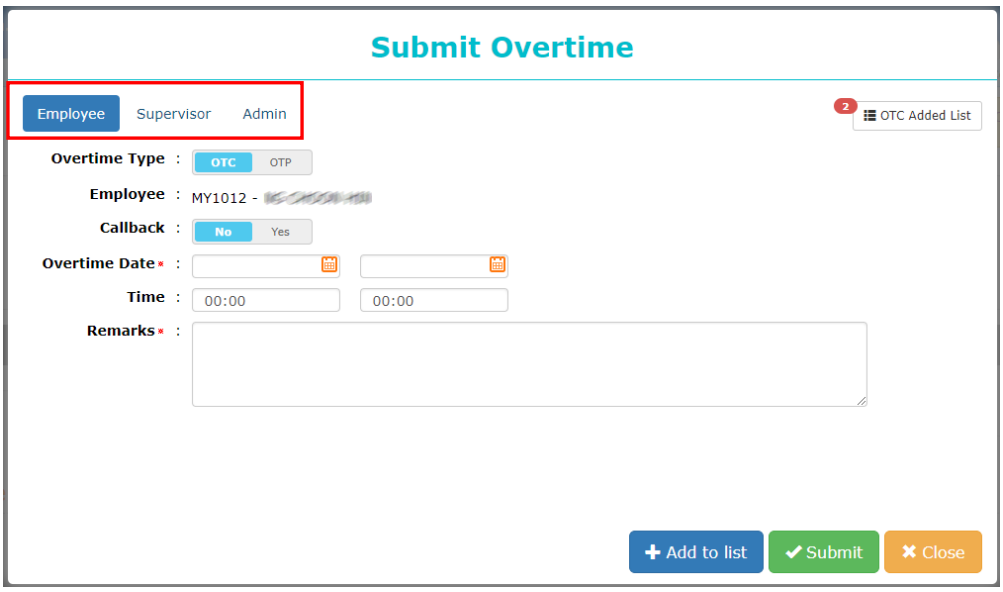


# OVERTIME APPLICATION

To request for Overtime, employee must be assigned to **Employee Overtime Group** with given an effective date and e-signature policy turned on.

## 2.1 Submit Overtime Request

i. Click from the icon highlighted below


Once the dialog box appears (as shown the above), under select the desired tab, either **"Employee", "Supervisor"**, or **"Admin".** User may start to apply overtime claim.

Follow the steps below to submit overtime request:

1. Select types of Overtime (if options are set for OTC (OT Claim) / OTP (OT Pre-Plan) / Callback
2. Insert date range
3. Insert time range
4. Fill in remarks if necessary
5. Click Submit to submit the OT request.
6. System will prompt for signature in a dialog box (as shown below), user may click on to erase signature or to cancel (if reuse previous signature is allowed).


7. Sign then click  to confirm
8. System will prompt previous signature in dialog box (as shown below), if previous signature exists (and policy is turned on). User may click on  to sign again or click  to confirm.

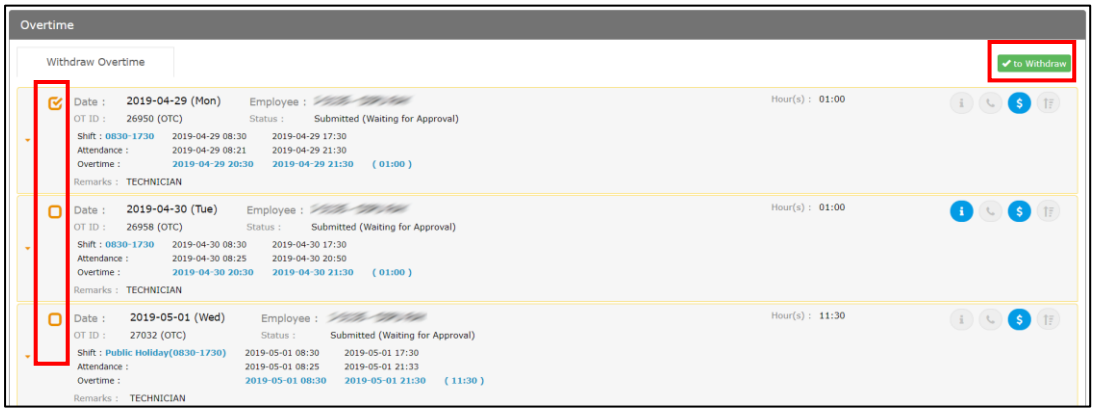
## 2.2 Withdraw OT Records

Only allows to withdraw OT Records which at status of pending approval.

Click the “Summary/Withdraw” icon highlighted below.

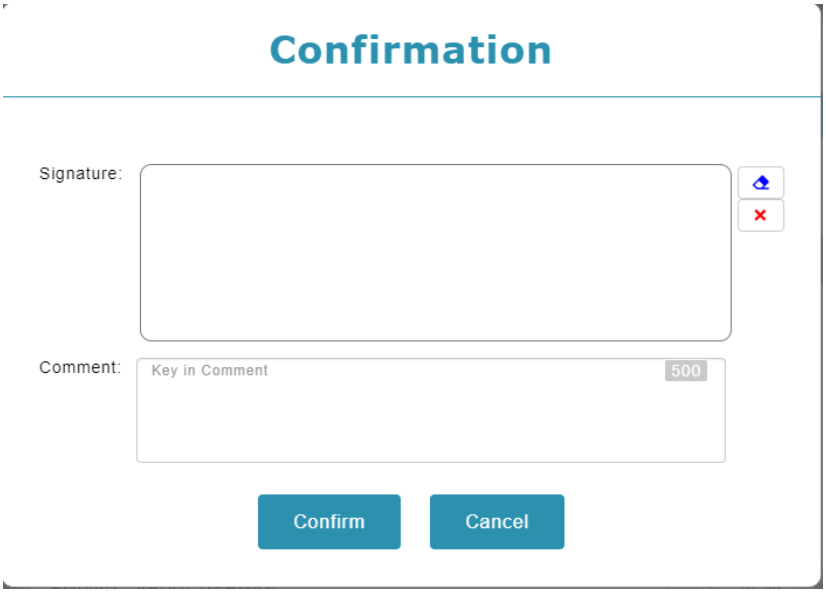

Select either **“Employee”, “Supervisor”** or **“Admin”.**


Then click Withdraw to withdraw OT Records.

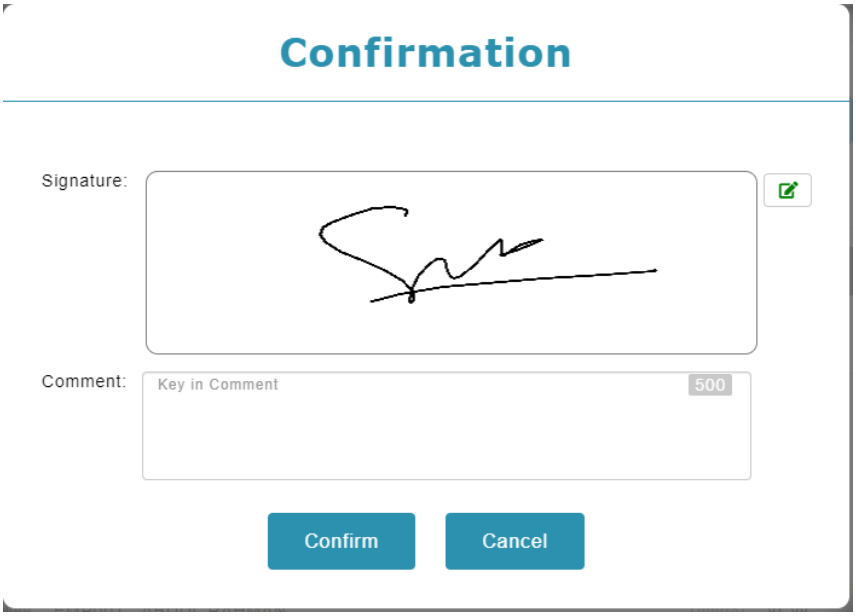



Follow the steps below to withdraw an overtime record:

1. Tick the option for withdrawal.
2. Click to Withdraw to proceed.
3. System will prompt for signature in a dialog box (as shown below), user may click on to erase signature or to cancel (if reuse previous signature is allowed). Optionally, user may insert comment after signing

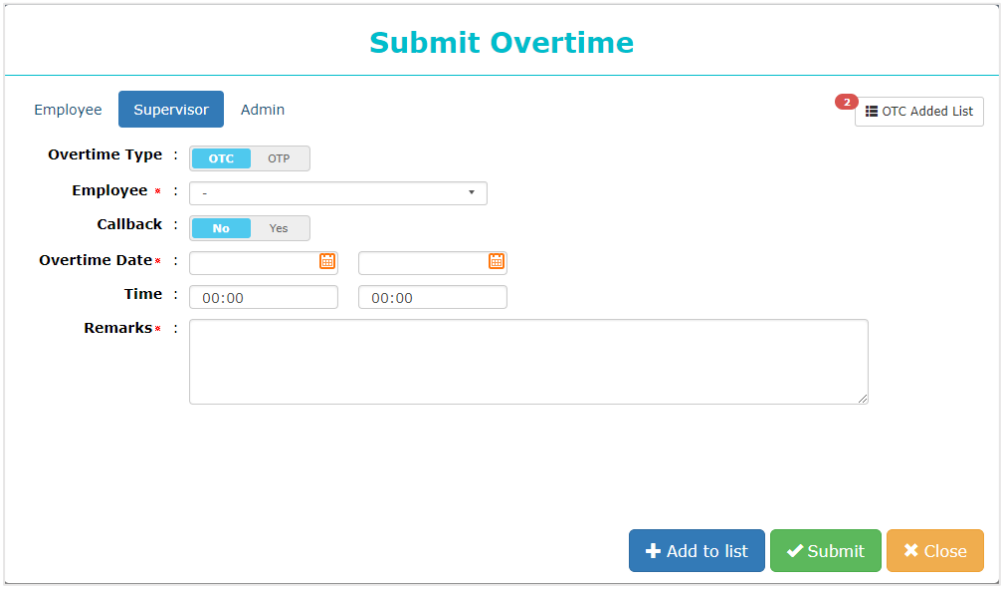



4. Sign then click  to confirm
5. System will prompt previous signature in dialog box (as shown below), if previous signature exists (and policy is turned on). User may click on  to sign again or click  to confirm. Optionally, user may insert comment after signing

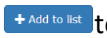


## 2.3 Add Overtime request to list and save as draft

This function is to allow user (can be employee/supervisor) to create the Overtime request to list to be saved as draft. The listed items can be submitted later. Items saved as drafts can be viewed by individual employee/direct supervisor and authorized admin.

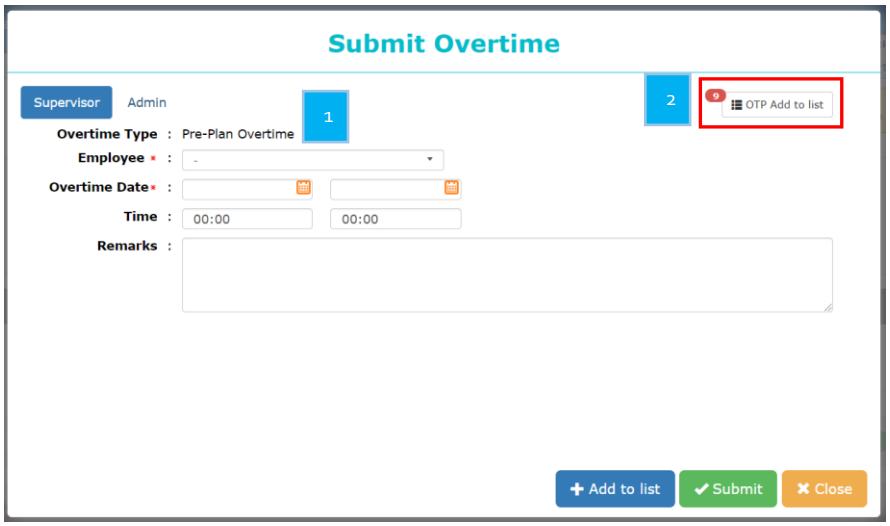



Follow the steps below to add item to list and save as draft:

1. Select an Overtime Type (if the selected employee is entitled for OTC (OT Claim) & OTP (OT Pre-Plan) / Callback.
2. Select if you are applying on behalf of **Employee, Supervisor** or **Admin**.
3. Choose subordinates from the list (*can select more than one employee if submission on-behalf* )
4. Insert the date range
5. Insert time range
6. Fill in remarks (if it's a mandatory setting)
7. Click 

to add item to list and save as draft.

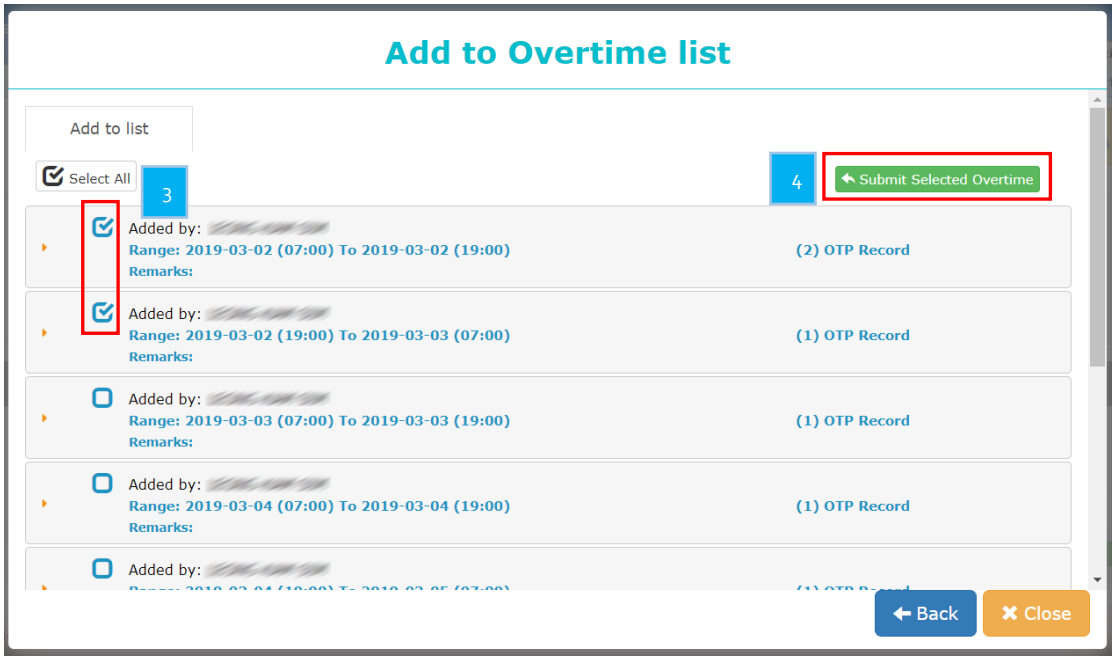
## 2.4 Submit Overtime Items added to list




Follow the steps below to submit overtime request which added to list:

Step 1: Select an Overtime Type (either **OTC**/**OTP**/**Callback**) that you wish to submit on behalf.

Step 2: If the selection of **OTC** application, user can see OTP Add to list at the top-right corner, click OTP Add to list and a list of overtime record will be shown.

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Step 3: Mark **√** to the Overtime Record that you wish to submit

Step 4: Select Submit Selected Overtime to submit Overtime record.

Step 5: System will prompt for signature in a dialog box (as shown below), user may click on  to erase signature or  to cancel (if reuse previous signature is allowed).


Step 6: Sign then click 

to confirm

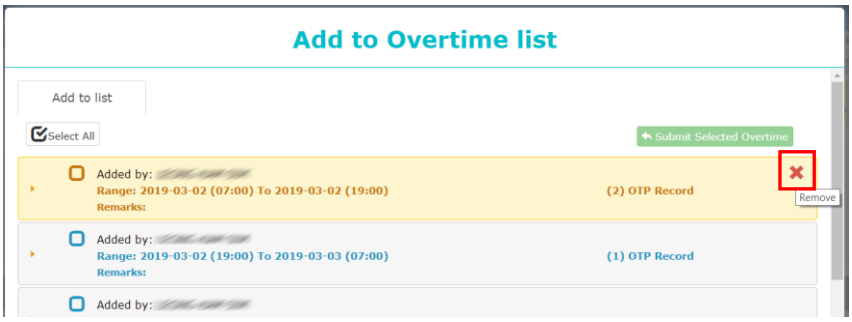
Step 7: System will prompt previous signature in dialog box (as shown below), if previous signature exists (and policy is turned on). User may click on  to sign again or click 

to confirm. Optionally, user may insert comment after signing.

## 2.5 Remove item that have been added to list

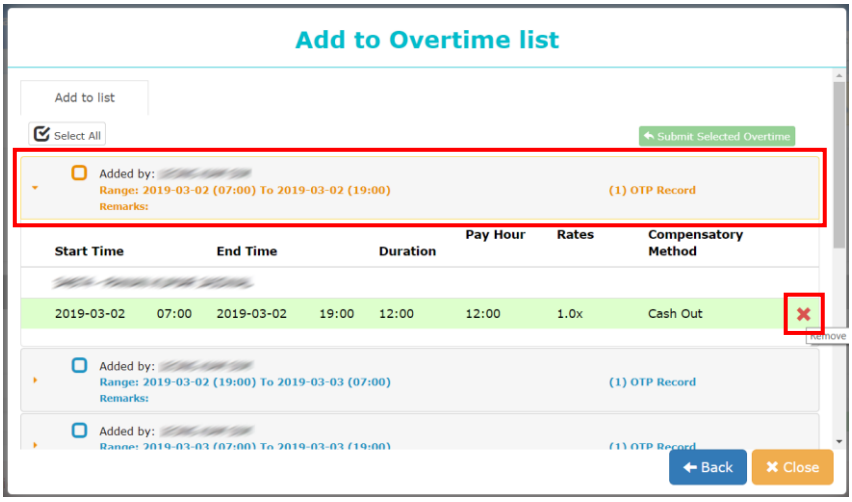
Step 1: To retrieve Overtime record, go to **Added to Overtime List**,

Step 2: User can see OTP Add to list at the top-right corner, click OTP Add to list and a list of overtime record will be shown.




**Option 1**: To remove all items include the main header.

Click on the main header to retrieve all details, identify the record that you wish to remove from list, simply mouse over the greyed-out x icon to select only certain record to delete.

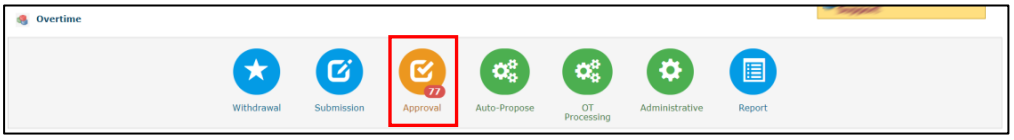


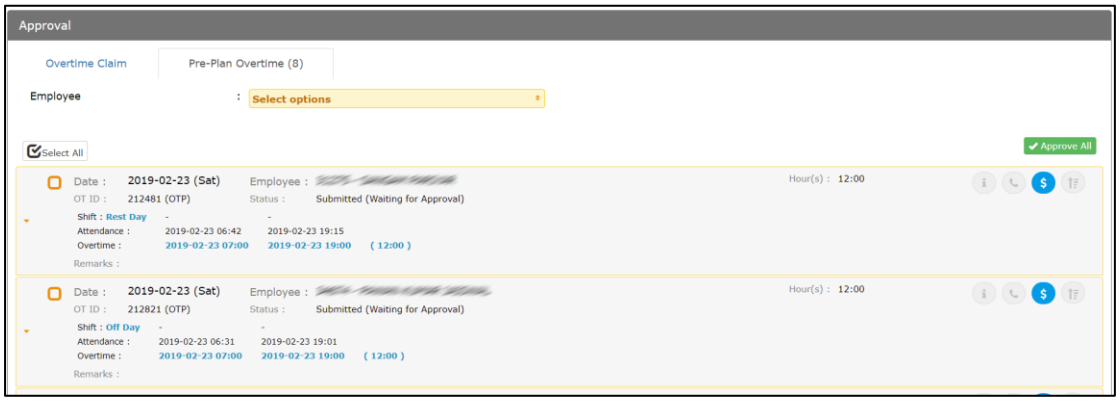

**Option 2**: To remove only certain item inside the header.

If user with to clear all record belonged to the main title, select **the header**, then mouse over to greyed-out x icon to delete **all records** inside the main header.

# OVERTIME APPROVAL

## 3.1 Approve/ reject overtime request via system




Approver can choose to apply filter to select employee before making approval/reject Overtime request.

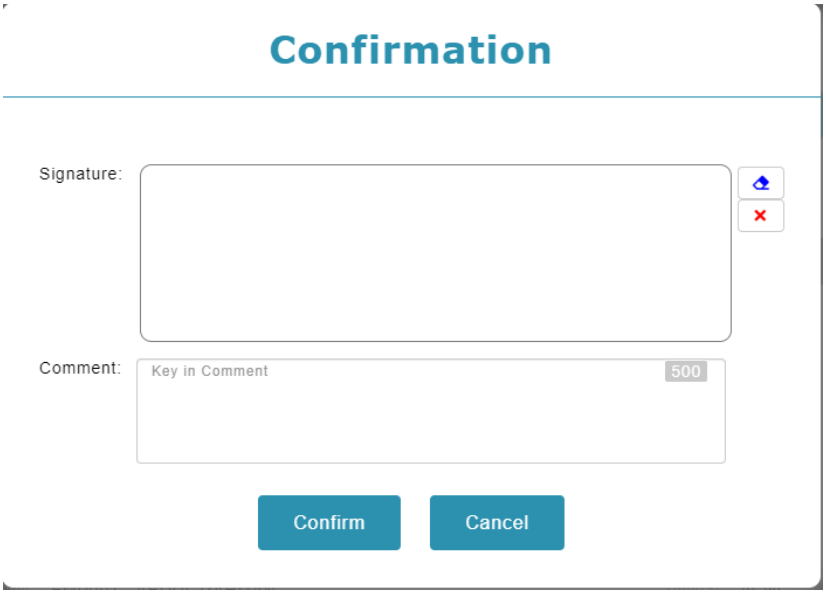
Follow the steps below to approve/reject leave:

Step 1: Click the icon of **"Approval"** as highlighted above

Step 2: Mark **√** on checkbox for action.

Step 3: To approve, click ✔ Approve Selected , to reject, click ✖ Reject Selected

Step 4: System will prompt for signature in a dialog box (as shown below), user may click on  to erase signature or  to cancel (if reuse previous signature is allowed). Optionally, user may insert comment after signing

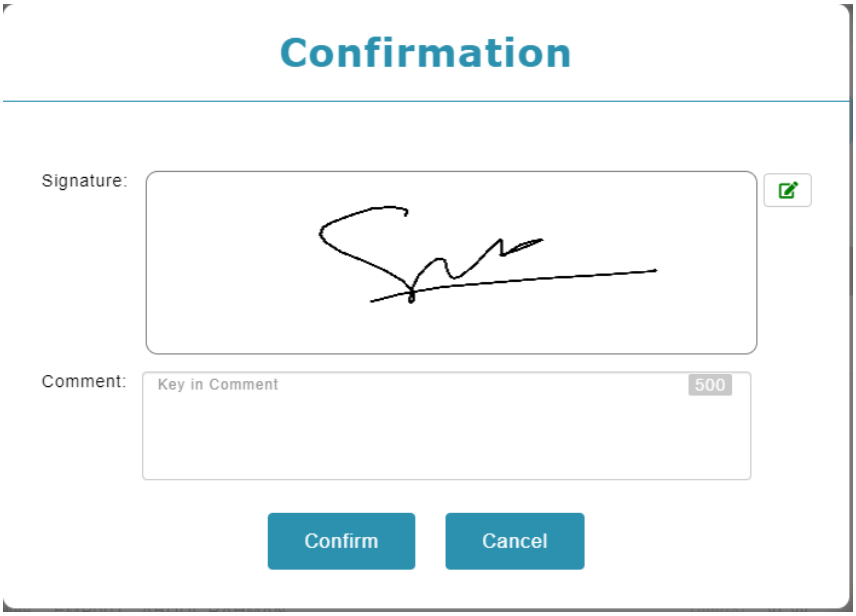


Step 5: Sign then click 

to confirm

Step 6: System will prompt previous signature in dialog box (as shown below), if previous signature exists (and policy is turned on). User may click on  to sign again or click 

to confirm. Optionally, user may insert comment after signing

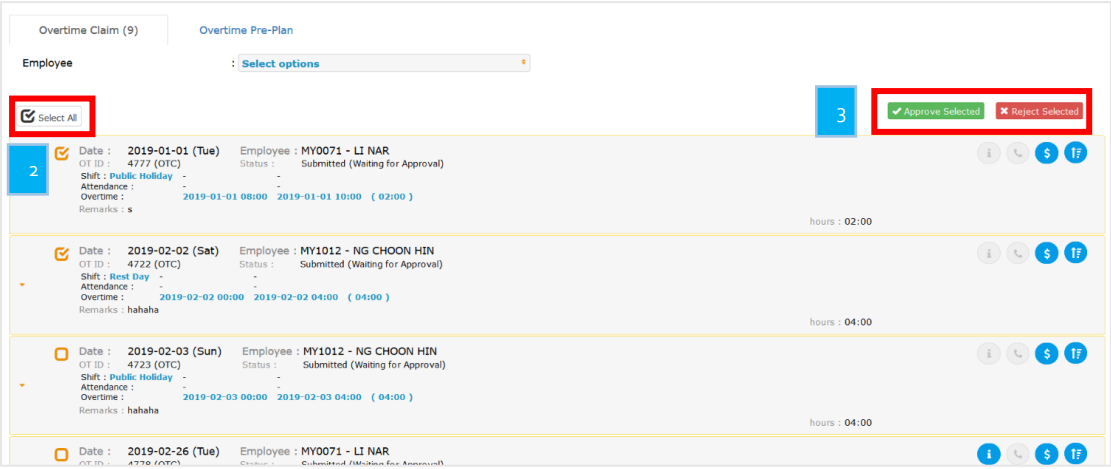



**Note**: Approval can be made via system / email / mobile apps.

## 3.2 Approve/reject overtime request via email

Once email of approver is set in system, employee overtime request will be sent to department supervisor/manager via email notification. In the email, click the highlighted **HERE** to redirect to the approval page.

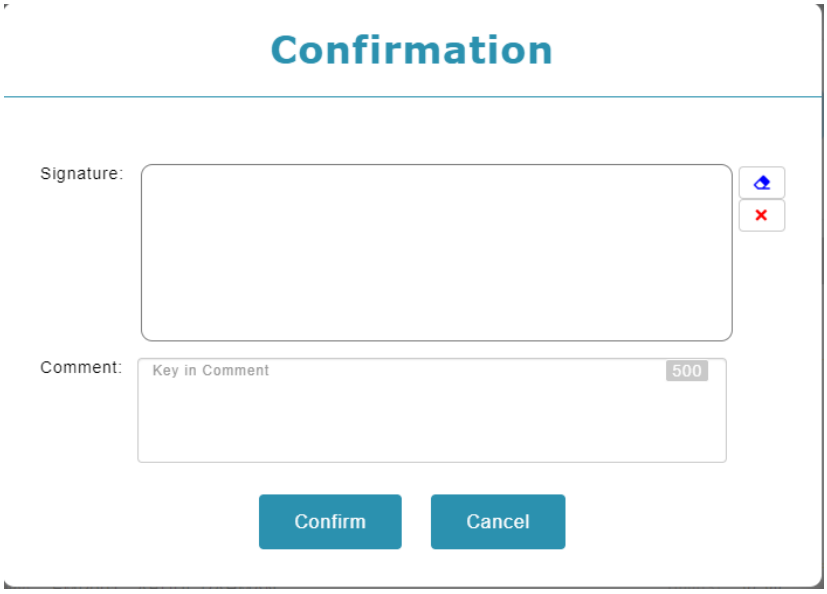

Approval/rejection can be made once user is being redirected to the approval page.



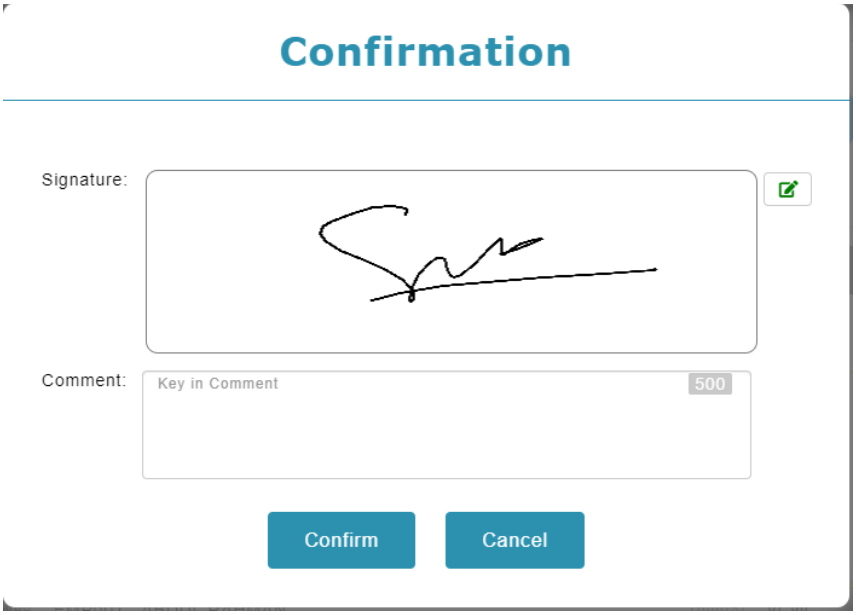

Approver can choose to filter the employees before approve/reject the OT Record

Follow the steps below to approve/reject OT:

1. Tick at the checkboxes
2. To approve click ✔ Approve Selected , to reject click ✖ Reject Selected
3. System will prompt for signature in a dialog box (as shown below), user may click on  to erase signature or  to cancel (if reuse previous signature is allowed). Optionally, user may insert comment after signing



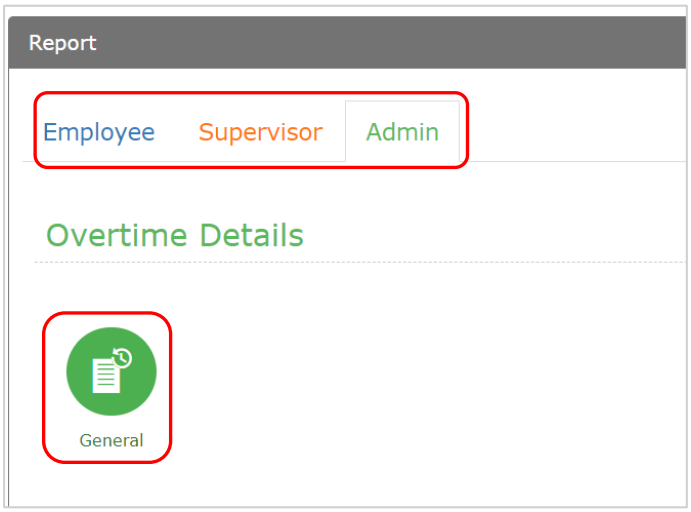

4. Sign then click  to confirm
5. System will prompt previous signature in dialog box (as shown below), if previous signature exists (and policy is turned on). User may click on  to sign again or click  to confirm. Optionally, user may insert comment after signing



# OVERTIME REPORT

## 4.1 Retrieve and view employee overtime records


Step 1: To view more details about Employee Overtime, click on the **Report** icon.
Step 2: Select desired Tab, and it will display all reports which available. Click on the **General** report to view.




<u>List of reports:</u>

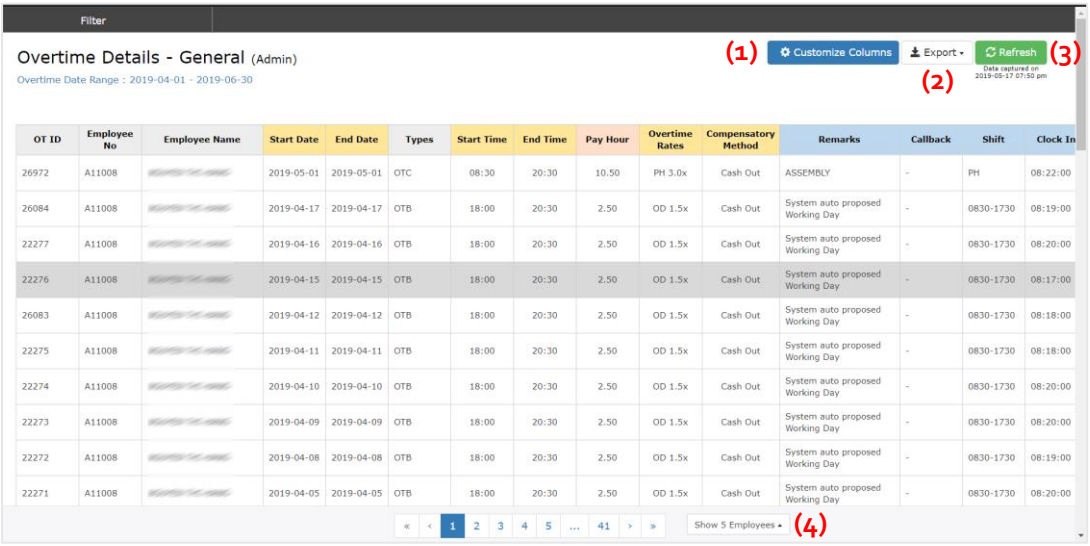
a. Overtime Detail
   - General

1. Overtime Details

By default, the report displays the overtime data submitted & approved.

The overtime breakdown shows:

a) Overtime payrate
b) Total overtime hours
c) Total overtime wages of each employee shifts.
d) Date range starting from the 1st – end of previous month, current month, and next month.




| OT ID | Employee No | Employee Name | Start Date | End Date | Types | Start Time | End Time | Pay Hour | Overtime Rates | Compensatory Method | Remarks | Callback | Shift | Clock In |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 26972 | A11008 | [illegible] | 2019-05-01 | 2019-05-01 | OTC | 08:30 | 20:30 | 10.50 | PH 3.0x | Cash Out | ASSEMBLY | - | PH | 08:22:00 |
| 26084 | A11008 | [illegible] | 2019-04-17 | 2019-04-17 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:19:00 |
| 22277 | A11008 | [illegible] | 2019-04-16 | 2019-04-16 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:20:00 |
| 22276 | A11008 | [illegible] | 2019-04-15 | 2019-04-15 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:17:00 |
| 26083 | A11008 | [illegible] | 2019-04-12 | 2019-04-12 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:18:00 |
| 22275 | A11008 | [illegible] | 2019-04-11 | 2019-04-11 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:18:00 |
| 22274 | A11008 | [illegible] | 2019-04-10 | 2019-04-10 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:20:00 |
| 22273 | A11008 | [illegible] | 2019-04-09 | 2019-04-09 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:20:00 |
| 22272 | A11008 | [illegible] | 2019-04-08 | 2019-04-08 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:19:00 |
| 22271 | A11008 | [illegible] | 2019-04-05 | 2019-04-05 | OTB | 18:00 | 20:30 | 2.50 | OD 1.5x | Cash Out | System auto proposed Working Day | - | 0830-1730 | 08:20:00 |

Step 1: Click on Customize Columns to show more columns

Step 2: Click on Export to download report to excel, or generate print report.

Step 3: Click on Refresh to retrieve latest data.

Step 4: Paging and no. of employee per page

Step 5: Apply Filter to for user preference report format.

Step 6: Click Retrieve to filter the data.