



TimePunch

# TimePunch Calendar v3.6

User Manual

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# TIMEPUNCH CALENDAR V3.6

## Introduction

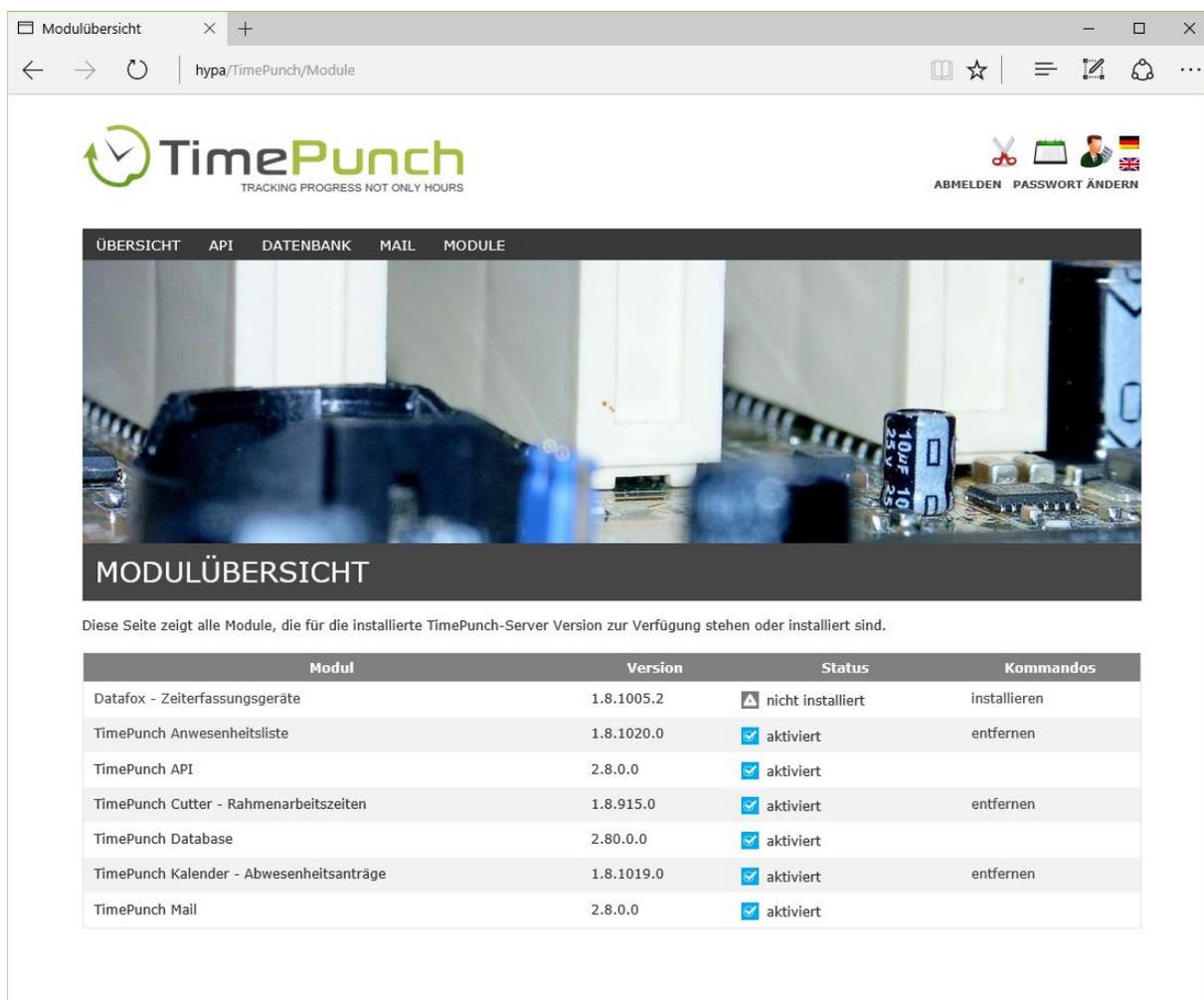
This document describes how to use the TimePunch calendar. It's used for leave requests, such as holidays or days of sliding, to apply for and to approve it.

## Precondition

The requirement is a working installation of the TimePunch application server. In addition, it is important that the TimePunch SMTP client is configured correctly.

## Installation

To install the calendar, it's necessary to logon as an administrator the TimePunch application server. In the area of administration / modules, the calendar module can be installed.



The screenshot shows the TimePunch web application interface. The browser address bar indicates the URL is `hypa/TimePunch/Module`. The page features the TimePunch logo and navigation links for 'ABMELDEN' and 'PASSWORT ÄNDERN'. A navigation menu includes 'ÜBERSICHT', 'API', 'DATENBANK', 'MAIL', and 'MODULE'. The main content area is titled 'MODULÜBERSICHT' and contains a table of installed and available modules.

Diese Seite zeigt alle Module, die für die installierte TimePunch-Server Version zur Verfügung stehen oder installiert sind.

Modul	Version	Status	Kommandos
Datafox - Zeiterfassungsgeräte	1.8.1005.2	nicht installiert	installieren
TimePunch Anwesenheitsliste	1.8.1020.0	aktiviert	entfernen
TimePunch API	2.8.0.0	aktiviert	
TimePunch Cutter - Rahmenarbeitszeiten	1.8.915.0	aktiviert	entfernen
TimePunch Database	2.80.0.0	aktiviert	
TimePunch Kalender - Abwesenheitsanträge	1.8.1019.0	aktiviert	entfernen
TimePunch Mail	2.8.0.0	aktiviert	

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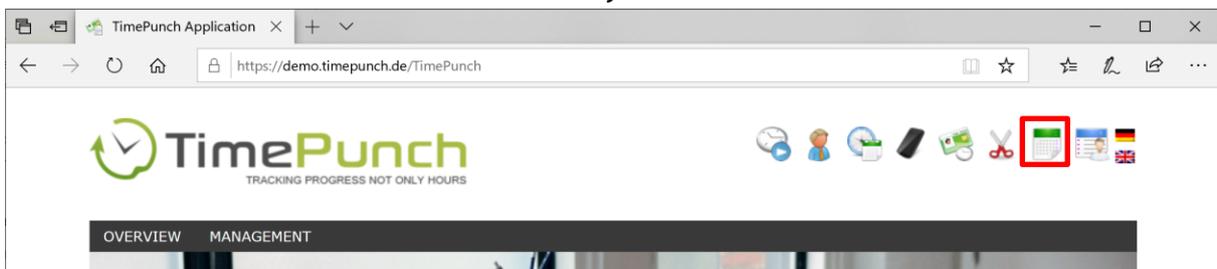
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## Using the calendar

The following pages describe how to use the calendar module.

### Starting the calendar module

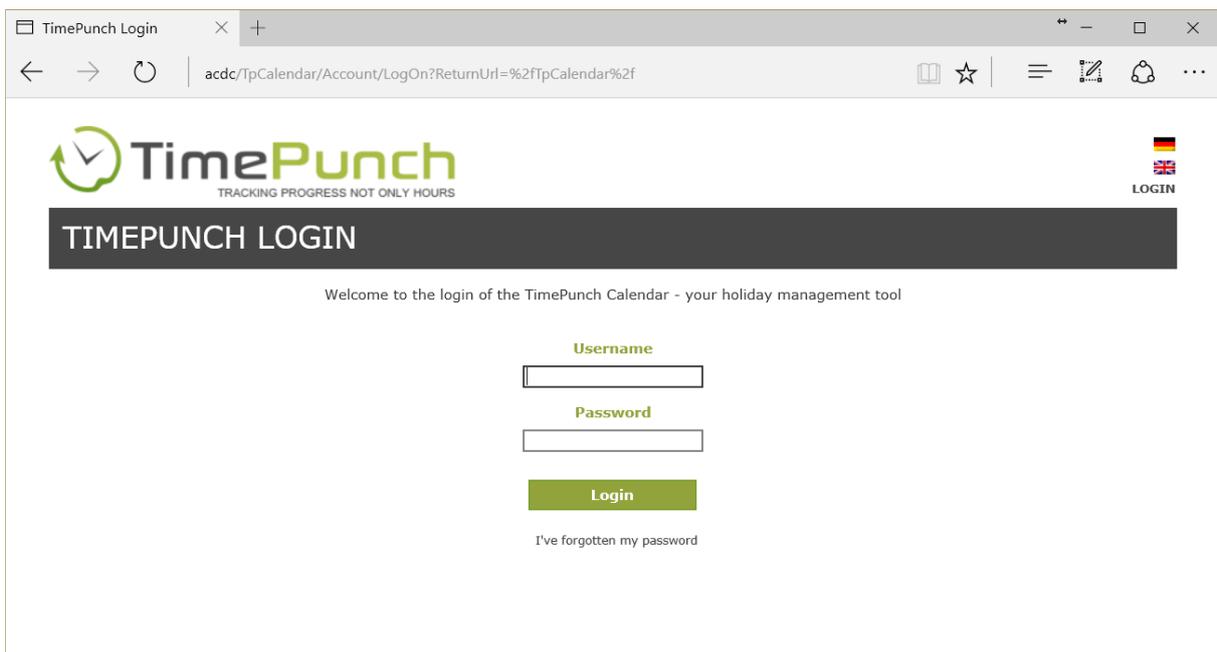
The calendar module can be started via the symbol of the "calendar".



This opens a web page of the module with the following URL

`http://{ServerName}/TpCalendar`

At this page the staff must login with the credentials of TimePunch. In order to use the module, the employee profile must be protected with a password.



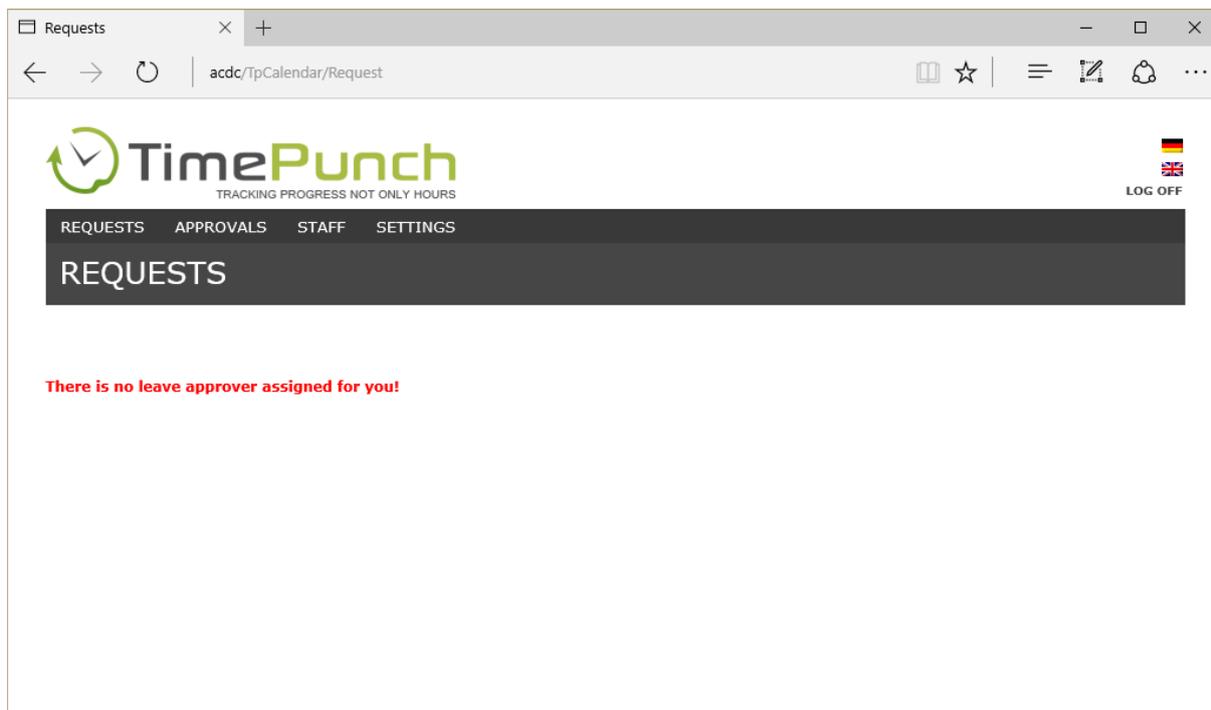
## TIMEPUNCH CALENDAR V3.6

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### The first logon

At first logon, the calendar with the personal calendar opens.

If one clicks at this time the menu and opens the "requests" page, the following error message will be displayed "There is no leave approver assigned for you!"



To correct this, one staff must be assigned to a line-manager as authorization person or leave-approver.

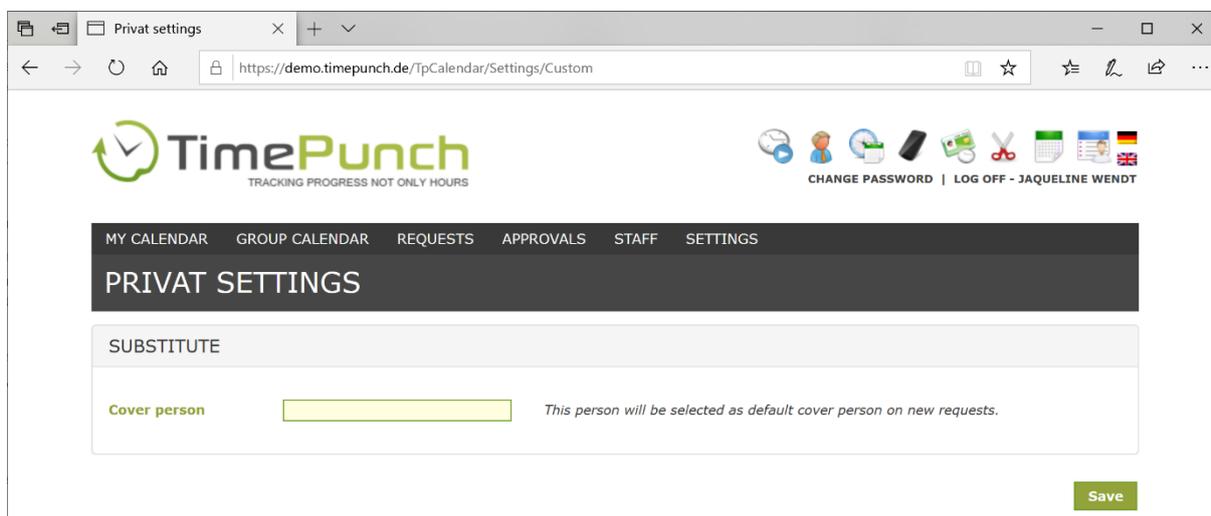
More information can be found in section "Assign authorization person".

*Important: You can't assign yourself as a person of authorization.*

## Settings

### Personal Settings

In the personal settings, each employee can set a permanent substitute for himself. This substitution person is automatically stored for all new absence requests.



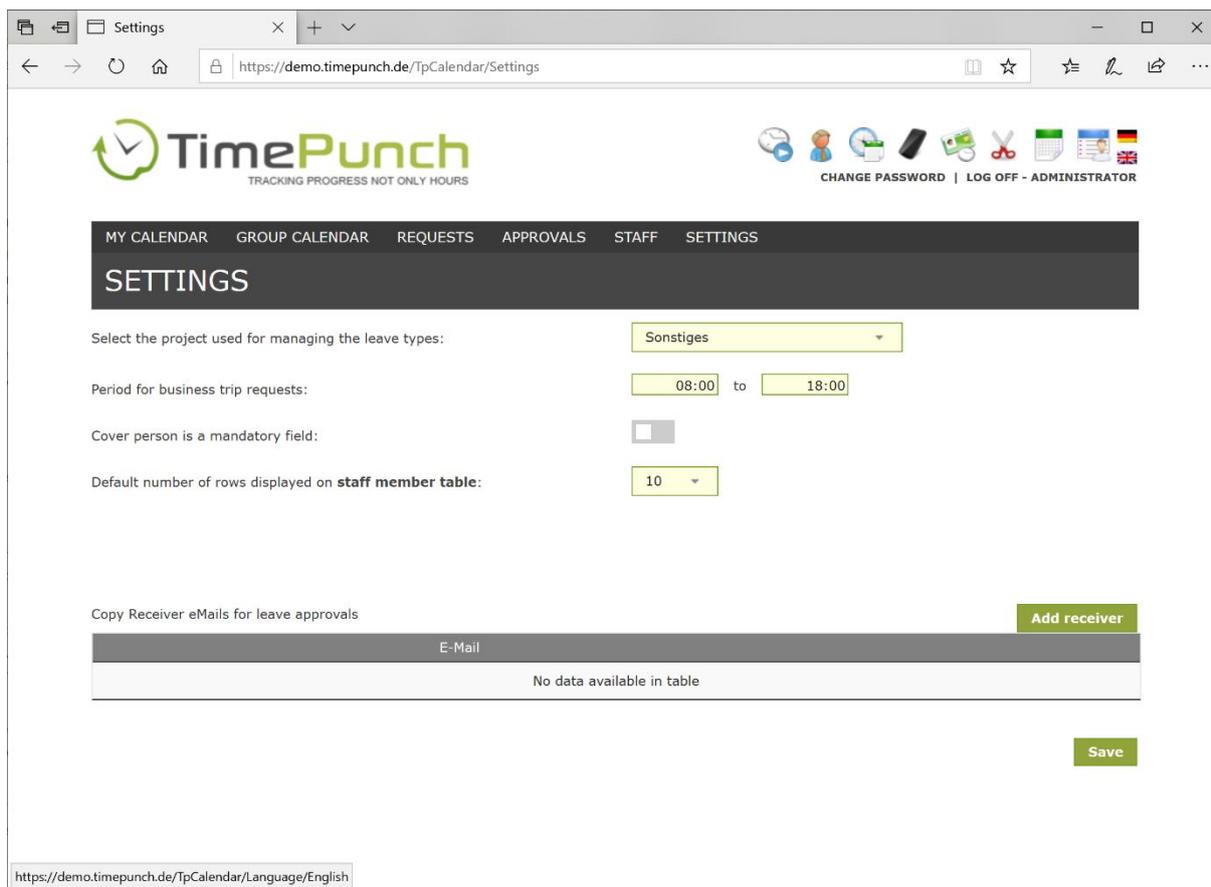
Of course, the representative can be changed in the specific proposal.

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## Global settings

Before holidays and other absences can be requested, a project must be selected, which defines the absence types that can be selected.

In TimePunch this is usually the project 'Others'. It includes for example by default the entry types sick, vacation and overtime. But it also can be used any other project as a basis for creating absence requests.



The screenshot shows the 'Settings' page in the TimePunch application. The browser address bar indicates the URL is <https://demo.timepunch.de/TpCalendar/Settings>. The page features a navigation menu with options: MY CALENDAR, GROUP CALENDAR, REQUESTS, APPROVALS, STAFF, and SETTINGS. The 'SETTINGS' section is active, displaying the following configuration options:

- Select the project used for managing the leave types:** A dropdown menu is set to 'Sonstiges'.
- Period for business trip requests:** Two input fields are set to '08:00' and '18:00'.
- Cover person is a mandatory field:** A checkbox is currently unchecked.
- Default number of rows displayed on staff member table:** A dropdown menu is set to '10'.

Below these settings, there is a section for 'Copy Receiver eMails for leave approvals'. It includes an 'Add receiver' button and a table with the following structure:

E-Mail
No data available in table

A 'Save' button is located at the bottom right of the settings area. The footer of the page shows the URL <https://demo.timepunch.de/TpCalendar/Language/English>.

Because business trips may have separate start and end time than the default working times, it is possible to define the period for business trip bookings in calendar settings. This period is only relevant for applications of type “business trip”.

In the Global Settings you can also define whether a substitute must be defined for the applicant in the applications.

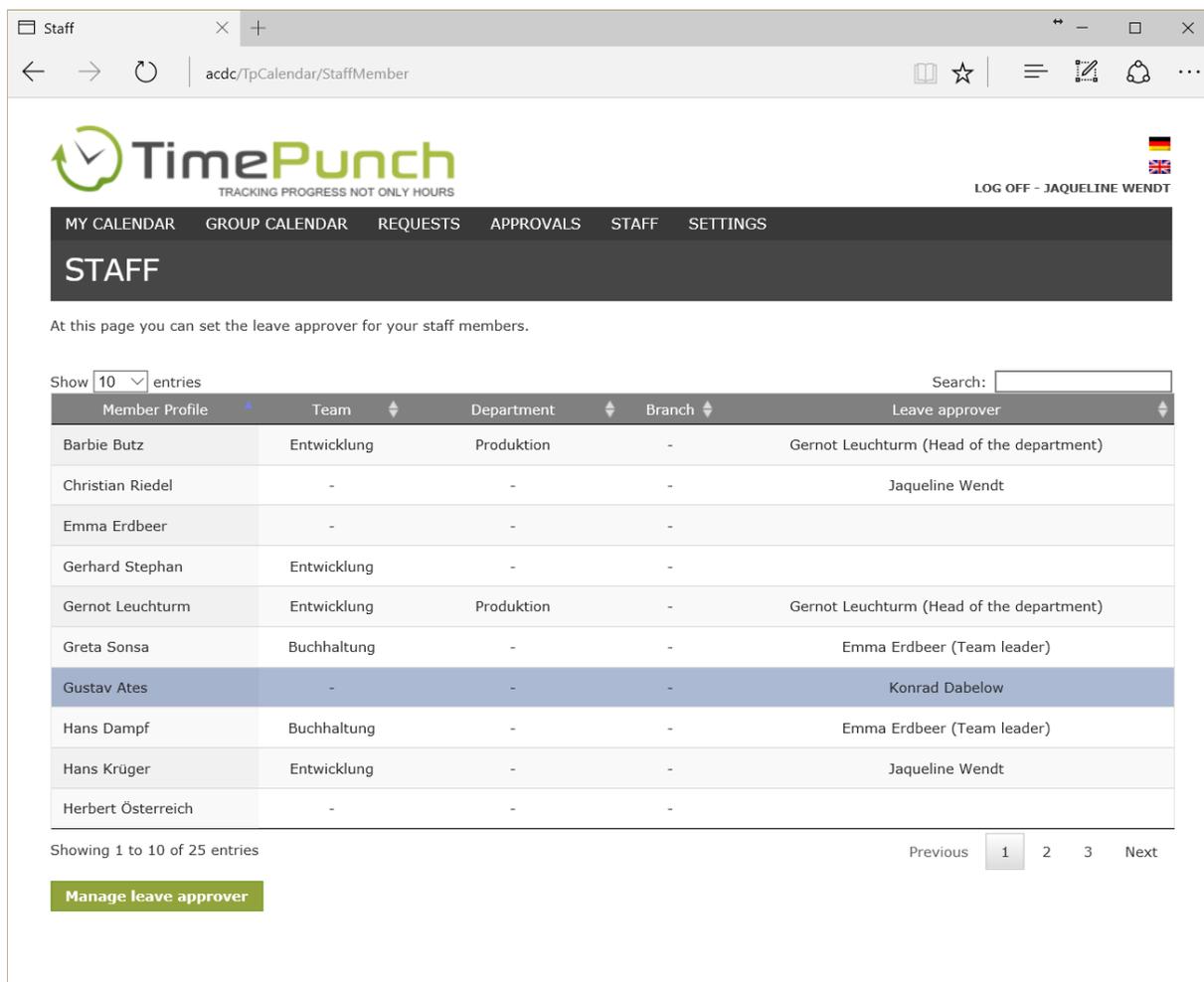
Additional receiver for approved leave requests can be also set. This can be useful, if the human resources department or the boss should be informed about the approved requests. In the case of approval of a request, all copy receivers on the list will receive the confirmation email in CC.

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## Assign authorization persons

In order that employees in TimePunch can raise a request on vacation or overtime, it is important that every employee is mapped to an authorization member.

Administrators and staff with personnel responsibility can set the authorization person for the managed employees in the menu "Staff".



The screenshot shows the TimePunch web interface. At the top, there is a navigation bar with the following menu items: MY CALENDAR, GROUP CALENDAR, REQUESTS, APPROVALS, STAFF, and SETTINGS. The 'STAFF' menu item is highlighted. Below the navigation bar, there is a header section with the TimePunch logo and the tagline 'TRACKING PROGRESS NOT ONLY HOURS'. On the right side of the header, there is a 'LOG OFF - JAQUELINE WENDT' button with a German flag icon.

Below the header, there is a section titled 'STAFF' with a sub-header: 'At this page you can set the leave approver for your staff members.'

There is a search bar and a dropdown menu for 'Show 10 entries'. Below this is a table with the following columns: Member Profile, Team, Department, Branch, and Leave approver.

Member Profile	Team	Department	Branch	Leave approver
Barbie Butz	Entwicklung	Produktion	-	Gernot Leuchtturm (Head of the department)
Christian Riedel	-	-	-	Jaqueline Wendt
Emma Erdbeer	-	-	-	
Gerhard Stephan	Entwicklung	-	-	
Gernot Leuchtturm	Entwicklung	Produktion	-	Gernot Leuchtturm (Head of the department)
Greta Sonsa	Buchhaltung	-	-	Emma Erdbeer (Team leader)
Gustav Ates	-	-	-	Konrad Dabelow
Hans Dampf	Buchhaltung	-	-	Emma Erdbeer (Team leader)
Hans Krüger	Entwicklung	-	-	Jaqueline Wendt
Herbert Österreich	-	-	-	

Below the table, there is a pagination control showing 'Showing 1 to 10 of 25 entries' and a 'Previous 1 2 3 Next' navigation bar. At the bottom left, there is a green button labeled 'Manage leave approver'.

This page will show for each employee, to which team he is associated and in which department and branch he's working. The authorization person appears as the last column.

If this person has a management function at the same time, then this function will be displayed in brackets.

Using the search (right above the table), the display of the staff can be restricted accordingly. This facilitates the mapping.

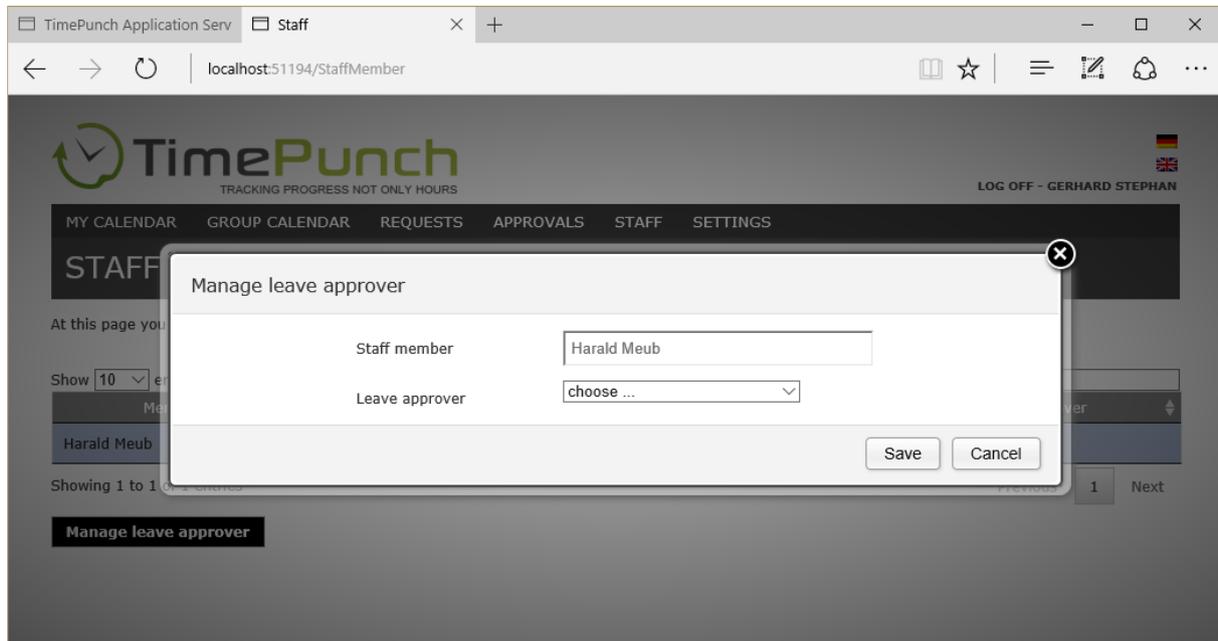
## TIMEPUNCH CALENDAR V3.6

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### Manage leave approver

To set an authorization person, the employee must first be selected. To do this, simply click on the corresponding row.

The following dialog opens "Manage leave approver" by clicking on the button.



As pre-selection for the authorization person can be selected the specific instances of management (Team Manager / head of Department / Branch Manager). Otherwise freely selectable employees can be set as leave-approver too.

### Important:

It is never possible to assign an authorization person to themselves. Also a senior staff member is dependent on, that a more high-level staff, assigns an authorization person to him.

Alternatively, the authorization person can be set by employees with administrator permission.

## Leave requests

All of the employee leave requests are listed in the menu "Requests".

The screenshot shows the 'REQUESTS' page in the TimePunch application. The page header includes the TimePunch logo and navigation tabs: MY CALENDAR, GROUP CALENDAR, REQUESTS, APPROVALS, STAFF, and SETTINGS. The main content area is titled 'REQUESTS' and contains a table of leave requests. The table has columns for Start Date, End Date, Type, State, and Business Days. Below the table are three buttons: 'Raise Request', 'Edit Request', and 'Delete Request'. On the right side, there is a summary of leave days for the year 2016, including Total Leave (30 days), Approved (14 days), Available (16 days), and Pending (3 days).

Start Date	End Date	Type	State	Business Days
2016/01/01	2016/01/08	Urlaub	Declined	3.5
2016/01/19	2016/01/19	Urlaub	Approved	1
2016/04/04 (Midday Start)	2016/04/08 (Midday End)	Urlaub	Pending	3
2016/04/21	2016/04/21 (Midday End)	Überstunden abbauen	Approved	0.5
2016/04/21 (Midday Start)	2016/04/21	Krank	Approved	0.5

Summary of leave days for 2016:

- Total Leave: 30 days
- Approved: 14 days
- Available: 16 days
- Pending: 3 days

This view is displayed only, if a valid leave approver has been assigned to the employee.

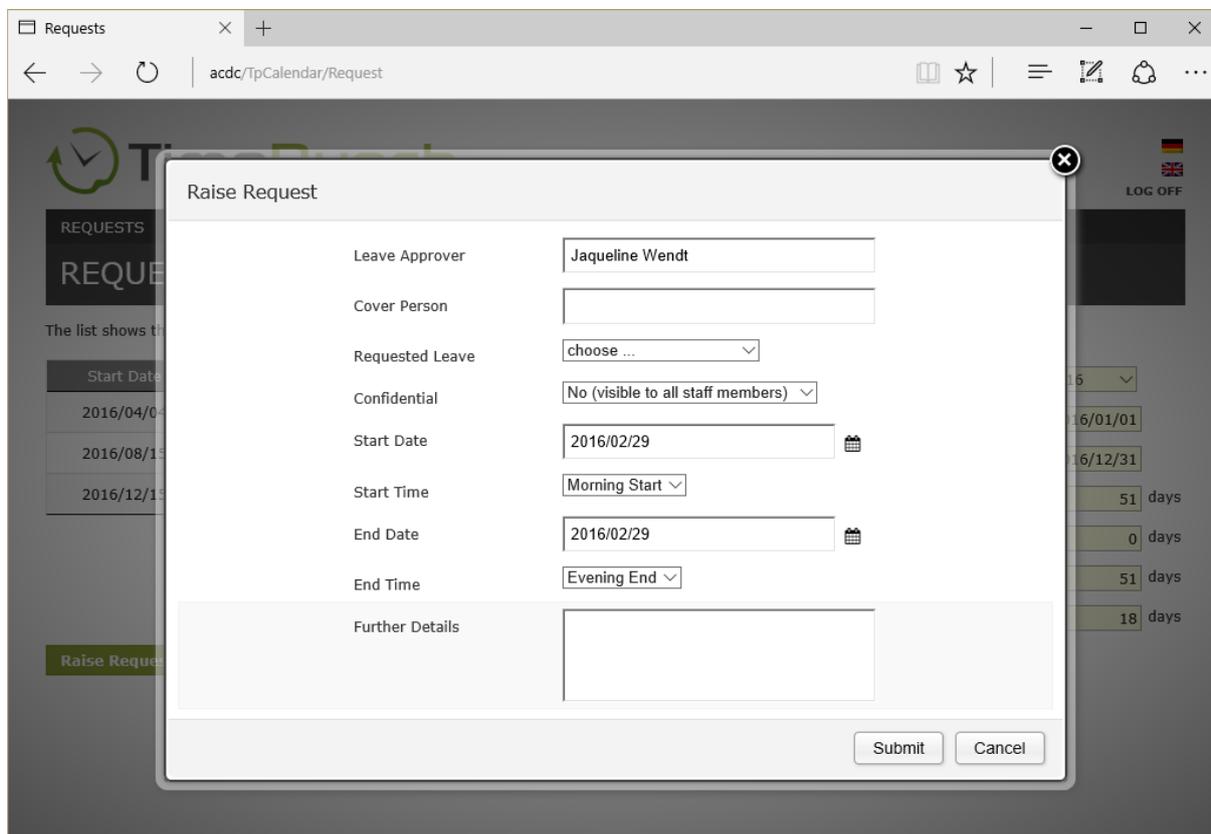
The table on the left shows the vacation requests, including start and end dates, as well as the type of request and the current status.

An overview of the total vacation in a selected year, the already approved and available vacation days, as well as the number of days and the pending leave requests is located on the right side.

## TIMEPUNCH CALENDAR V3.6

### Raise a new leave request

The "Raise request" button opens a dialog which allows to raise a new leave request.



The fields of the dialogue have the following meaning:

Field	Mandatory	Description
<b>Leave Approver</b>	no	The authorization person who has been assigned as the leave approver will be shown here.  The leave approver is allowed to accept or reject the requested leave.
<b>Cover Person</b>	optional	A staff member of the <u>same team or department</u> can be chosen as a cover person for the time of absence.
<b>Requested leave</b>	yes	That field contains the type of the requested absence. E.g. leave, sick time, flexi time etc.  Technically this is a task of the project that has been defined at the settings.

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Field	Mandatory	Description
<b>Confidential</b>	yes	It can be selected whether the request will be shown only the authorization person, or shown in the calendar to each registered staff.  This option only applies for requests. If the request has been approved, it will be shown independent from this setting, at the calendar.
<b>Start date</b>	yes	Start date of the absence
<b>Start time</b>	yes	Selection between morning and midday. This affects the first day of the requested time.
<b>End date</b>	yes	End date of the absence
<b>End time</b>	yes	Selection between midday and evening. This affects the last day of the requested time.
<b>Further Details</b>	optional	A text field which will only be shown to the leave approver when approving a rejecting the request.

After sending the request a mail will be send to the authorization person.



**ANTRAG AUF ÜBERSTUNDEN ABBAUEN VON 04.04.2016 BIS EINSCHLIEßLICH 08.04.2016**

Hallo Gerhard Stephan,

Hiermit beantrage ich Überstunden abbauen von 04.04.2016 bis einschließlich 08.04.2016.

Bitte klicken Sie den Link um den Antrag zu bearbeiten:  
<http://ACDC/TpCalendar/Approval>

Mit freundlichen Grüßen  
Hans Krüger

Diese E-Mail (inkl. Datenanhang) ist ausgewählten Empfängern (Personen oder Firmen) vorbehalten und beinhaltet möglicherweise vertrauliche oder gesetzlich geschützte Daten oder Informationen. Die unerlaubte Verwendung, Vervielfältigung oder Verbreitung dieser Daten oder Informationen kann gesetzeswidrig sein und ist verboten. Falls Sie nicht zu den ausgewählten Empfängern gehören, bitten wir Sie, diese Mitteilung zu löschen und den Absender zu benachrichtigen.

The authorization person (most time the line manager) now has the ability, with an embedded link in the mail, to approve or reject the request.

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## Edit a leave request

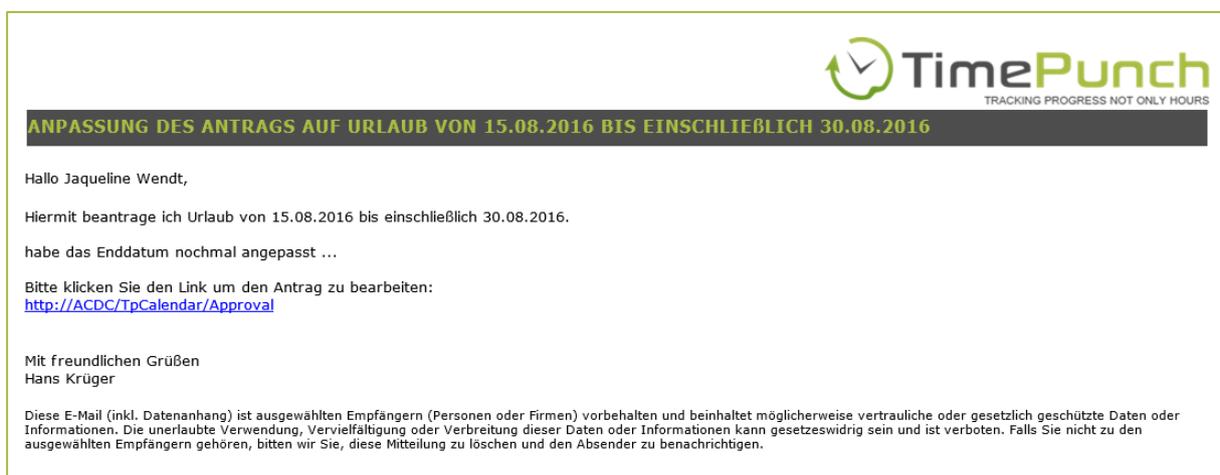
In order to modify an existing request, the corresponding row must be selected. Therefore just click the row. After that the button “Edit request” can be chosen. A dialog to edit the request will be opened. Its layout is identical to the one for raising a leave request.

The screenshot shows a web browser window with the URL 'acd/TpCalendar/Request'. A modal dialog titled 'Edit a leave request' is open. The dialog contains the following fields and values:

Leave Approver	Jaqueline Wendt
Cover Person	
Requested Leave	Urlaub
Confidential	No (visible to all staff members)
Start Date	2016/08/15
Start Time	Morning Start
End Date	2016/08/30
End Time	Evening End
Further Details	adjusted the end date ...

Buttons: Submit, Cancel

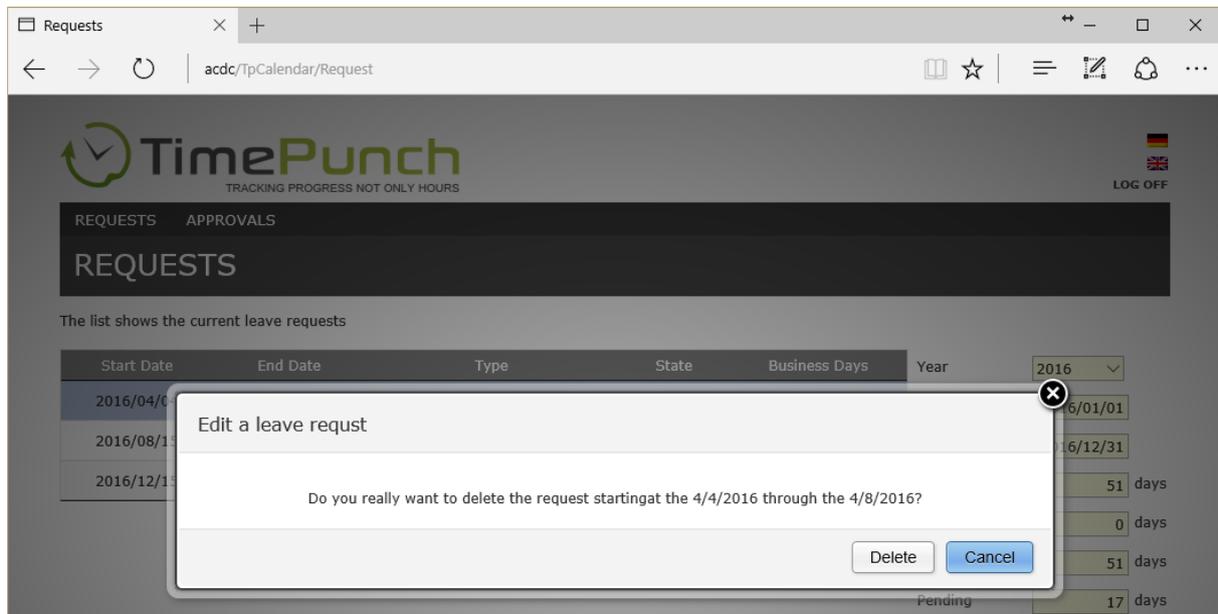
After submitting the leave request a mail containing the amendments will be send to the authorization person.



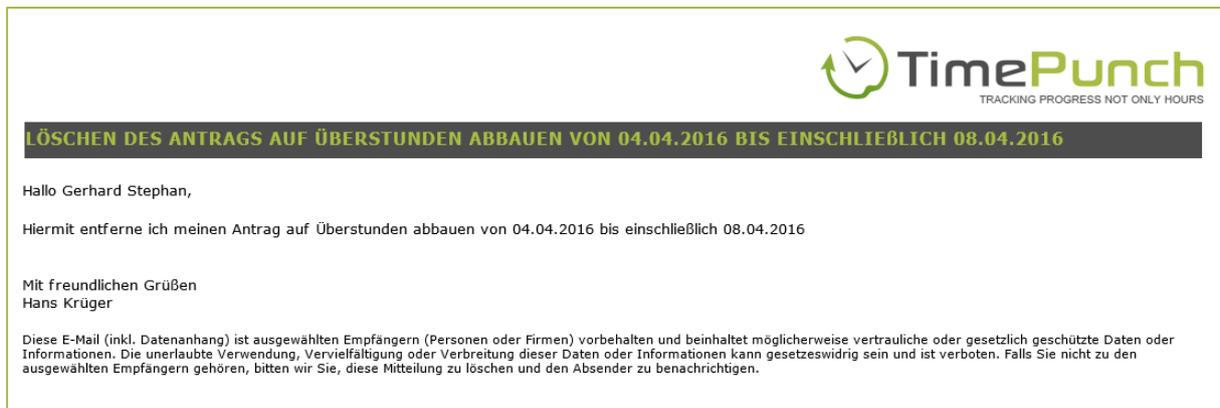
## TIMEPUNCH CALENDAR V3.6

### Delete a leave request

In order to delete an existing request, the corresponding row must be selected. Therefore just click the row. After that the button “Delete request” can be chosen. A security question will be opened. In order to delete the request, this security question must be answered with a click to the button “Delete”.



After deleting the request a mail will be send to the authorization person in order to inform about the removal of the request.



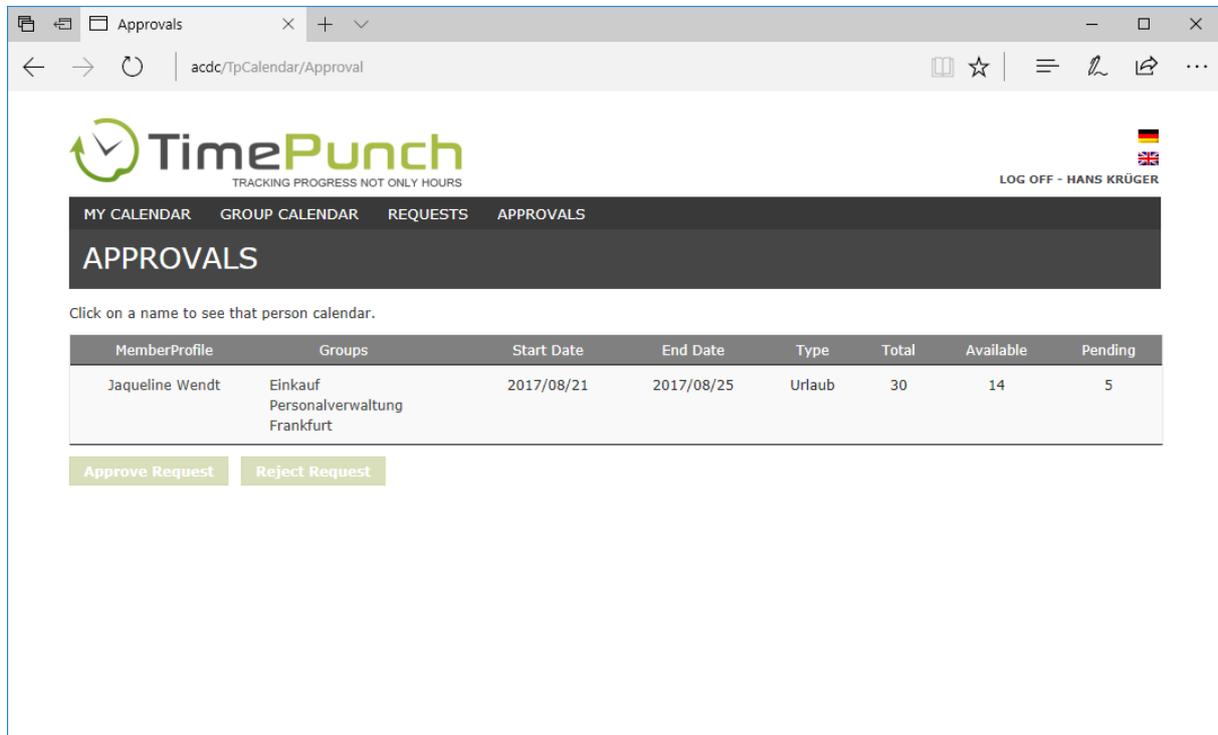
It's important to know that a request can only be deleted, if

- The request is in state “pending”
- Or the request is planned in future

Already approved requests that are in the past can't be deleted. In such an exceptional case, the leave must be deleted by the human resource department in TimePunch itself.

## Approvals

The menu “approvals” displays a list containing all leave requests that are pending and can be managed by the logged on user.



The screenshot shows the TimePunch web application interface. At the top, there is a navigation menu with options: MY CALENDAR, GROUP CALENDAR, REQUESTS, and APPROVALS. The 'APPROVALS' section is active. Below the navigation, there is a header for 'APPROVALS' and a sub-header 'Click on a name to see that person calendar.' A table displays the following data:

MemberProfile	Groups	Start Date	End Date	Type	Total	Available	Pending
Jaqueline Wendt	Einkauf Personalverwaltung Frankfurt	2017/08/21	2017/08/25	Urlaub	30	14	5

Below the table, there are two buttons: 'Approve Request' and 'Reject Request'.

By using the button “Approve Request” or “Reject Request” the requests can be approved or rejected.

A click on the employee profile opens the employees ' annual vacation Overview. By clicking on the name of the team, the department or the Office, the holiday situation of the respective group is displayed.

## TIMEPUNCH CALENDAR V3.6

### Approve a request

If a request shall be approved, it has to be selected with a click to corresponding row. The button “Approve request” will then be enabled.

After a click to “Approve request” a dialog opens in which all requested leave details are shown to the authorization person, so that the leave approver can validate the request.

The screenshot shows a web interface for TimePunch. A modal dialog titled "Approve Request" is open. The dialog contains the following fields:

Leave Approver	Jaqueline Wendt
Staff member	Hans Krüger
Cover Person	
Requested Leave	Urlaub
Confidential	No
Start Date	2016/08/15
Start Time	Morning Start
End Date	2016/08/30
End Time	Evening End
Further Details	adjusted the end date ...

At the bottom of the dialog are two buttons: "Approve Request" and "Cancel".

After the successful validation, the request can be approved with a click to the “Approve Request” button. As a result of the approval, the times will be automatically booked in TimePunch and a mail will be send to inform the user about the approval.

The screenshot shows an email notification from TimePunch. The subject line is "GENEHMIGUNG DES ANTRAGS AUF URLAUB VON 15.08.2016 BIS EINSCHLIEßLICH 30.08.2016". The email content is as follows:

Hallo Hans Krüger,

hiermit genehmige ich Ihren Antrag auf Urlaub von 15.08.2016 bis einschließlich 30.08.2016.

Mit freundlichen Grüßen  
Jaqueline Wendt

Diese E-Mail (inkl. Datenanhang) ist ausgewählten Empfängern (Personen oder Firmen) vorbehalten und beinhaltet möglicherweise vertrauliche oder gesetzlich geschützte Daten oder Informationen. Die unerlaubte Verwendung, Vervielfältigung oder Verbreitung dieser Daten oder Informationen kann gesetzeswidrig sein und ist verboten. Falls Sie nicht zu den ausgewählten Empfängern gehören, bitten wir Sie, diese Mitteilung zu löschen und den Absender zu benachrichtigen.

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### Reject a request

In order to reject a request, it has to be selected with a click to corresponding row. The button “Reject request” will then be enabled.

After a click to “Reject request” a dialog opens in which all requested leave details are shown to the authorization person, so that the leave approver can validate the request.

Leave Approver	Jaqueline Wendt
Staff member	Hans Krüger
Cover Person	
Requested Leave	Urlaub
Confidential	No
Start Date	2016/08/15
Start Time	Morning Start
End Date	2016/08/30
End Time	Evening End
Further Details	adjusted the end date ...
Decline Reason	There we have release date. So no chance.

After the successful validation, the request can be rejected with a click to the “Reject Request” button. It’s important that a decline reason will be entered. The entered decline reason will be send to the user to inform him about the reason for rejecting the request.

**TimePunch**  
TRACKING PROGRESS NOT ONLY HOURS

**ABLEHNUNG DES ANTRAGS AUF URLAUB VON 15.08.2016 BIS EINSCHLIEßLICH 30.08.2016**

Hallo Hans Krüger,

Hiermit lehne ich Ihren Antrag auf Urlaub von 15.08.2016 bis einschließlich 30.08.2016 ab.

Grund:

Hier haben wir Auslieferung, daher leider abgelehnt.

Mit freundlichen Grüßen  
Jaqueline Wendt

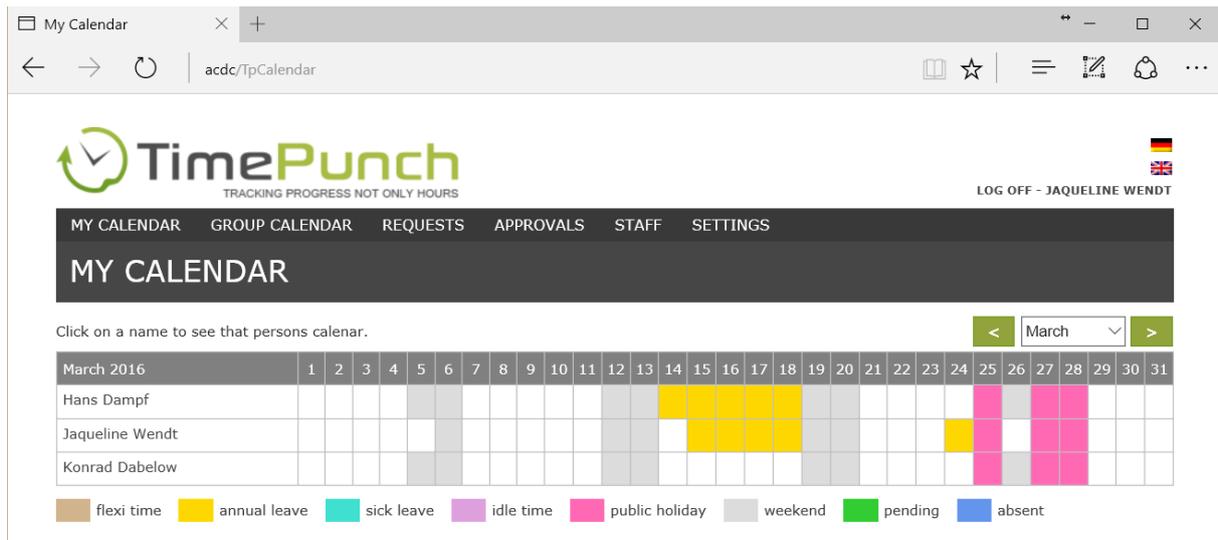
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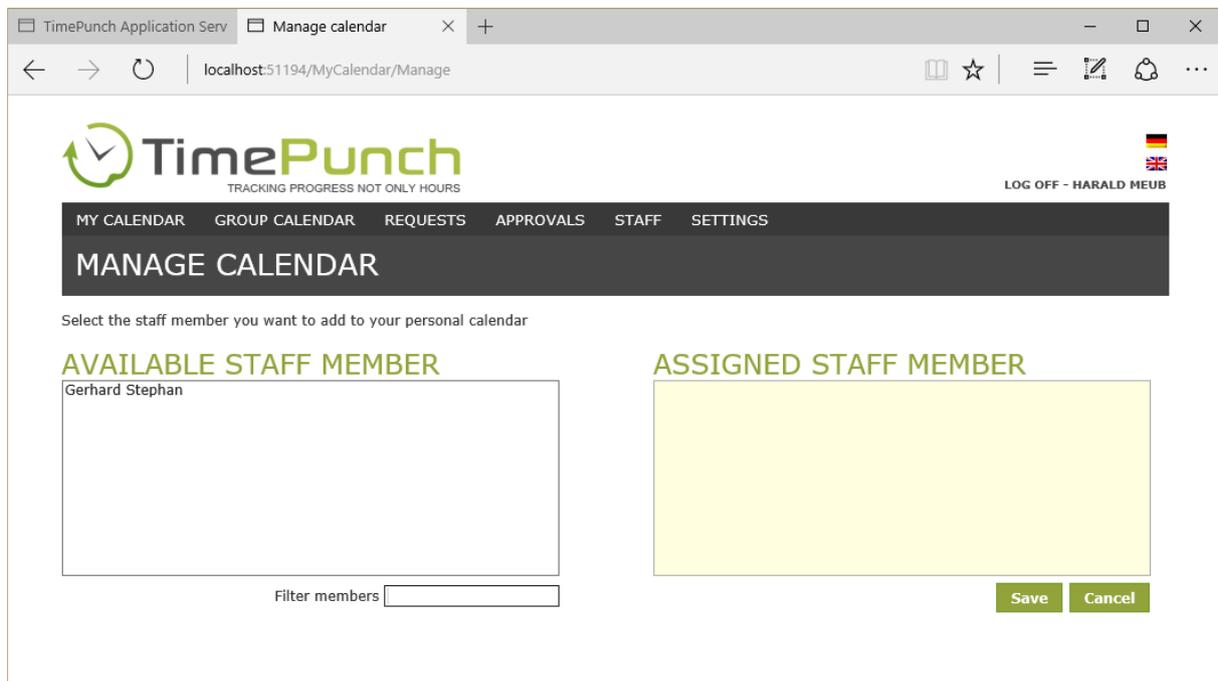
## Personal Calendar

Each employee owns a personal calendar. It will be displayed, as soon as the user logs on to the TimePunch Calendar module.

In the beginning the calendar is empty. Each user is allowed to enter their personal contacts to it. Depending on the permission (e.g. line-manager) the calendar shows the reason for the absence or only the absence itself.



Using the menu “My Calendar / Manage Calendar” the displayed staff member can be chosen.



It's important to know, that the logged on user will always be shown in the calendar.

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## Group calendar

Using the “Group calendar” the current planning for the absence of the team, the department or branch can be displayed.

The screenshot shows the TimePunch Group Calendar interface. The browser address bar indicates the URL is localhost:51194/MyCalendar/GroupCalendar. The page header includes the TimePunch logo and the tagline "TRACKING PROGRESS NOT ONLY HOURS". The user is logged in as HARALD MEUB. The main navigation menu includes MY CALENDAR, GROUP CALENDAR, REQUESTS, APPROVALS, STAFF, and SETTINGS. The GROUP CALENDAR section is active, showing a calendar for April 2016. The calendar is filtered by Group type: Team and Selection: TOP. The calendar grid shows the following absence types for Gerhard Stephan and Harald Meub:

Employee	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Gerhard Stephan																														
Harald Meub																														

Legend for absence types:

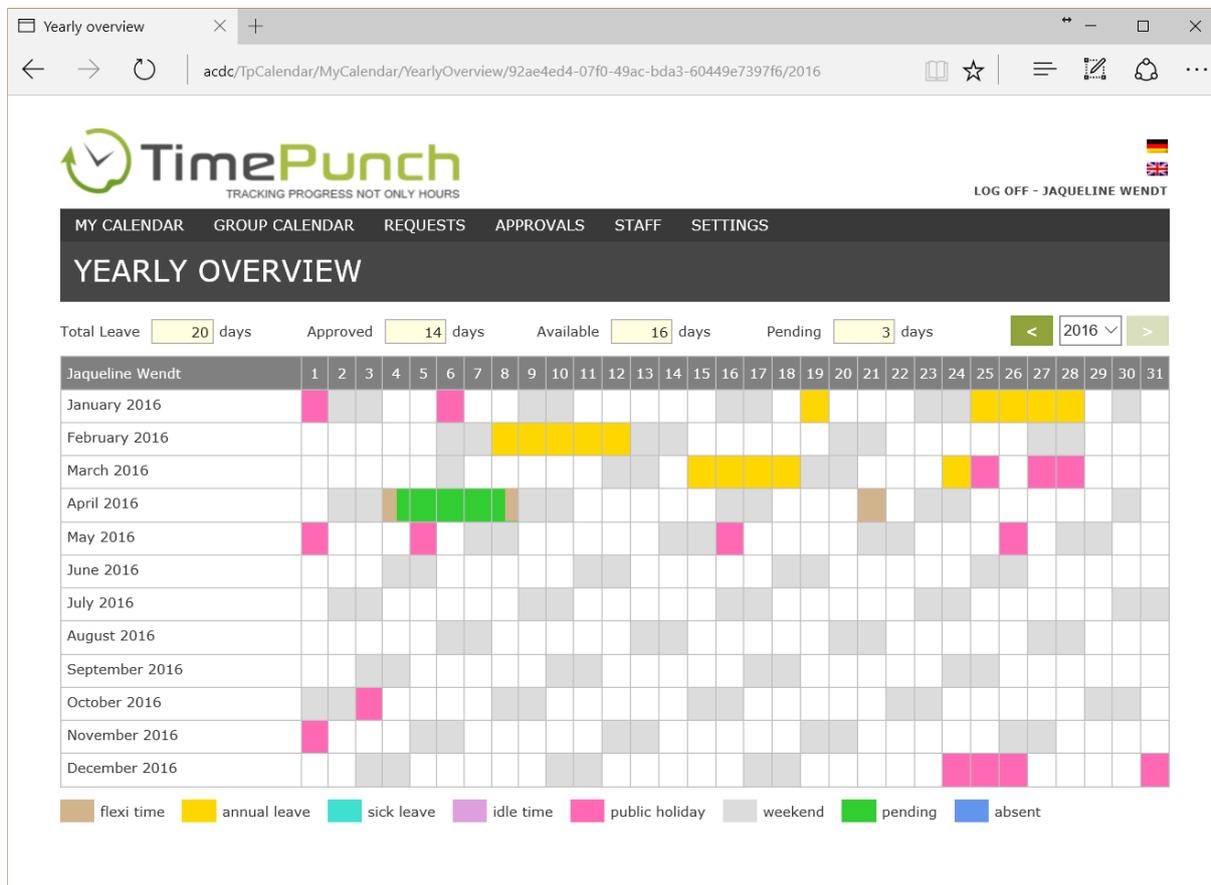
- flexi time
- annual leave
- sick leave
- idle time
- public holiday
- weekend
- pending
- absent

This makes it easy to plan the own leave and offers transparency to the employees.

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## Yearly overview

Independent of the personal calendar or the group calendar, there is another feature. If a staff member is clicked the yearly overview for the employee will be shown.



The yearly calendar offers a detailed overview of the leave- and absence times for the whole year.

## Customizations

The following section describes which parts of the application can be customized.

### Colors of calendar overview

It is possible to define different colors for the leave types (flexi time, annual leave, sickness etc.) To do this you need an additional .css-file, which can be created with any text editor. This file must be named: **Calendar.custom.css** and saved in the folder c:\Program Files\TimePunch\TimePunch Calendar\Content.

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You can copy the following css classes to this file:

```
.FlexiTime {
    background: orange;
}

.AnualLeave {
    background: gold;
}

.Sickness {
    background: turquoise;
}

.SicknessNotPaid {
    background: cadetblue;
}

.IdleTime {
    background: plum;
}

.PublicHoliday {
    background: hotpink;
}

.Weekend {
    background: gainsboro;
}

.Pending {
    background: limegreen;
}

.Absent {
    background: cornflowerblue;
}

.BusinessTrip {
    background: purple;
}

.Cancelled {
    background: url("../images/cancelled.png");
}

.Default {
    background: #FFFFFF;
}

.Worktime {
    background: #FFFFFF;
}

.Placeholder{
    background: url("../images/placeholder.png");
}
```

To change a color you have to assign the hex value of the color to the background property of the appropriate .css class.

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Example: If you like to change the color for flexi time to black you need to amend the class `.FlexiTime` like this:

```
.FlexiTime {  
    background: #000000;  
}
```

In the following table you can see which leave type belongs to which `.css` class:

Antragstyp	Css-Klasse
<b>Flexi time</b>	<code>.FlexiTime</code>
<b>Annual leave</b>	<code>.AnnualLeave</code>
<b>Sick leave</b>	<code>.Sickness</code>
<b>Sick leave (not paid)</b>	<code>.SicknessNotPaid</code>
<b>Idle time</b>	<code>.IdleTime</code>
<b>Public holiday</b>	<code>.PublicHoliday</code>
<b>weekend</b>	<code>.Weekend</code>
<b>pending</b>	<code>.Pending</code>
<b>absent</b>	<code>.Absent</code>
<b>Business trip</b>	<code>.BusinessTrip</code>
<b>cancelled</b>	<code>.Cancelled</code>

If you would like to change the color for working time too, you have to amend the class `.WorkTime`.

You don't have to update all `.css` classes. If you only want to change the color for flex time than you just copy this class to the file `Calendar.custom.css`.

# End of the Document