Imperium Employee Management

Dashboard Documentation

Table of Contents

Overview

Employee Management is an end-to-end solution to manage the leave cycle of employees in a systematic way that helps track employee attendance. The package is a composition of a Model-driven app – with real-time dashboards to view leave statistics and a Canvas App – enabling employees to time in and time out for marking attendance regularly.

Imperium Employee Management

The Model-driven Application is used to configure employee settings by the Manager while the employee can submit leave requests.

Requests

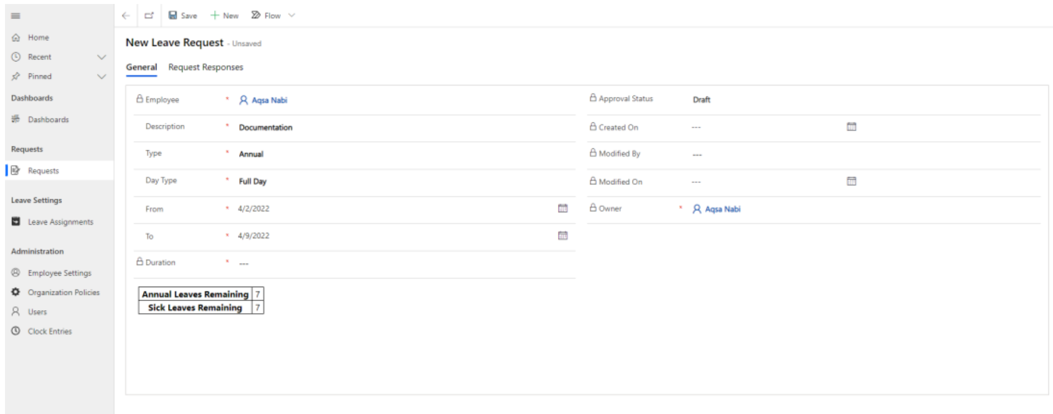
The section consists of one entity, used by the Users to submit the leave requests in the system.

Requests

To create a leave request in the system, click 'Requests' in the left navigation pane.

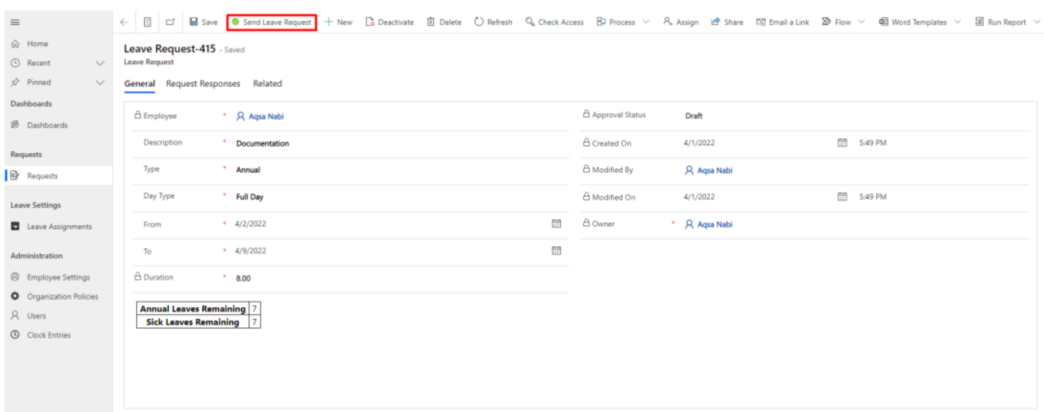
- Click 'New' on the command bar.
- The 'New Leave Request' form opens with the following details
    - Employee: This is a locked field. The system defaults the name of the user in the field which cannot be changed.
    - Description: This is a required, text-based field. The user is required to provide the reason of leave in the description.
    - Type: This is a required field. The system defaults to' Annual' as the leave type, however, there are other options available to select too:
        - Sick
        - Unpaid
        - Work from home
    - Day Type: This is a required field. Select an option from 'Full Day' and 'Half Day'.
    - From: This is a required date selector field. Provide the starting date of the leave.
    - To: This is a required date selector field. Provide the ending date of the leave.
    - Duration: This is a system-calculated field. The system calculates the number of leave days based on the date selected in the 'From' and 'To' fields.
    - Approval Status: The initial leave status is 'Draft' until the leave is sent or approved.
    - Created On: This is a system-generated field that shows the creation date of the leave.
    - Modified By: The username who last modified the leave request.
    - Modified On: The date when the last modification was made.

o Owner: The username of the record owner.

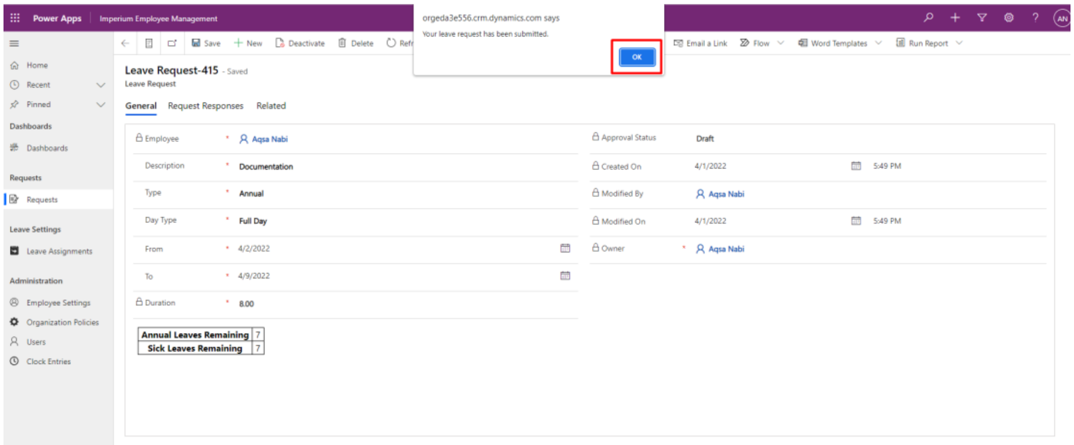


The main form has the ‘Annual Leaves Remaining’ and ‘Sick Leaves Remaining’ shown at the bottom. The system calculates the remaining leaves based on the previously availed leaves, so the user is aware of the remaining number of leaves while creating the leave request.

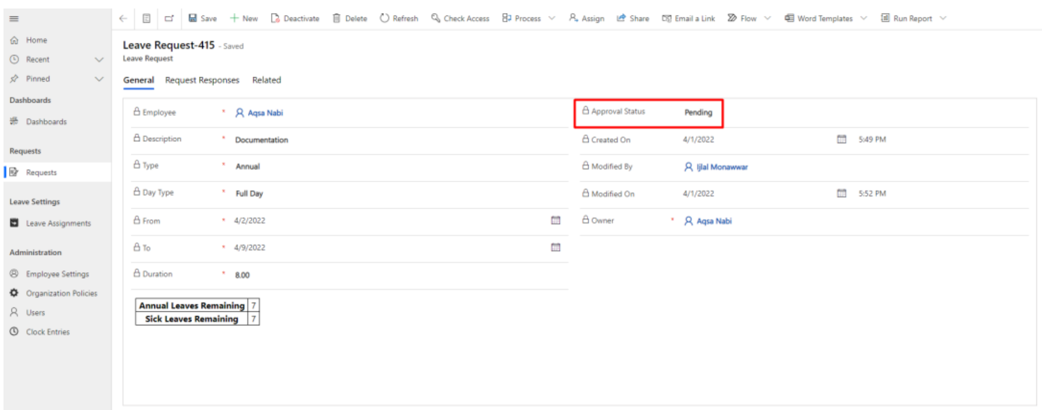
Click ‘Save’ on the command bar to save the leave request. The system saves the leave request and unhides the button ‘Send Leave Request’.



The system shows a pop-up on the screen for the confirmation of the leave request submission. Click ‘OK’ to close the pop-up box.



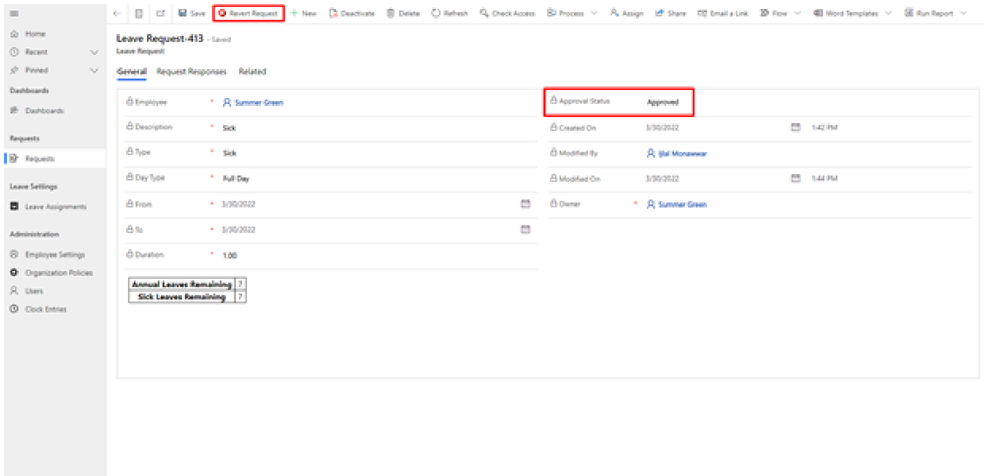
The system changes the Approval Status from ‘Draft’ to ‘Pending’.



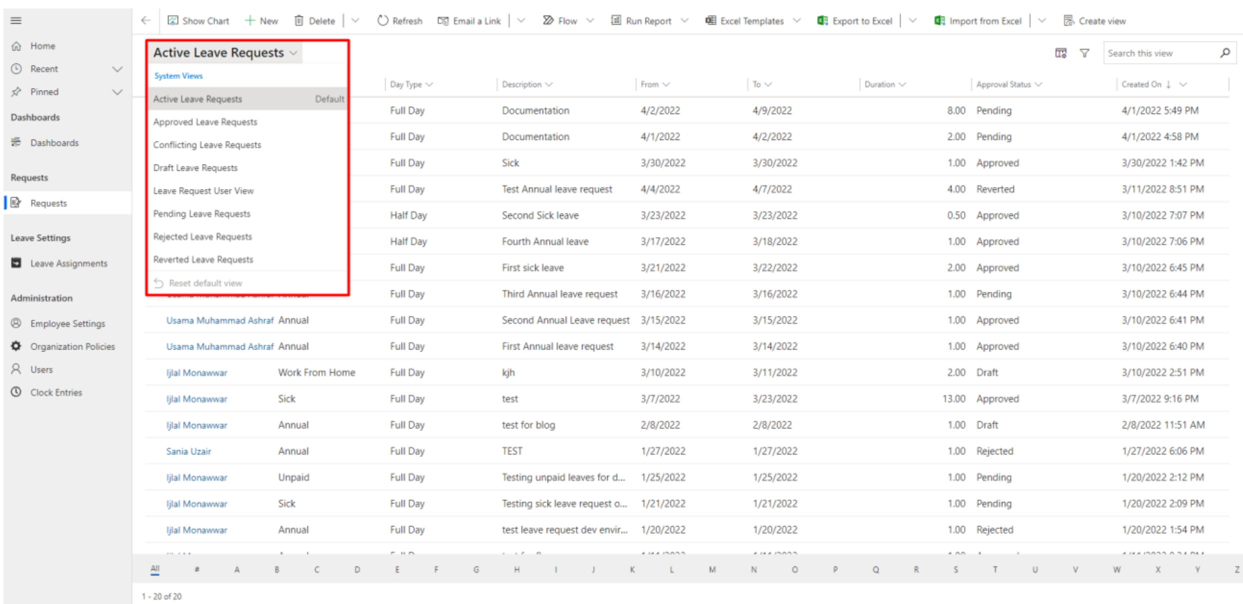
The records can no more be edited until the leave request is accepted or rejected by the manager.

To revert a leave request, click ‘Revert Request’ on the command bar. The system reverts the leave requests and recalculates the remaining number of leaves.

NOTE: Only leaves with ‘Approved’ status can be reverted.



To view the leave requests and their status, open the ‘Leave Requests’ view. The system has multiple views, separate for the status of leave requests.



Leave Settings

Leave Assignment is a setting for individual employees. The Manager/Admin can create multiple leave assignments for different Users/Employees of the system, starting at different dates.

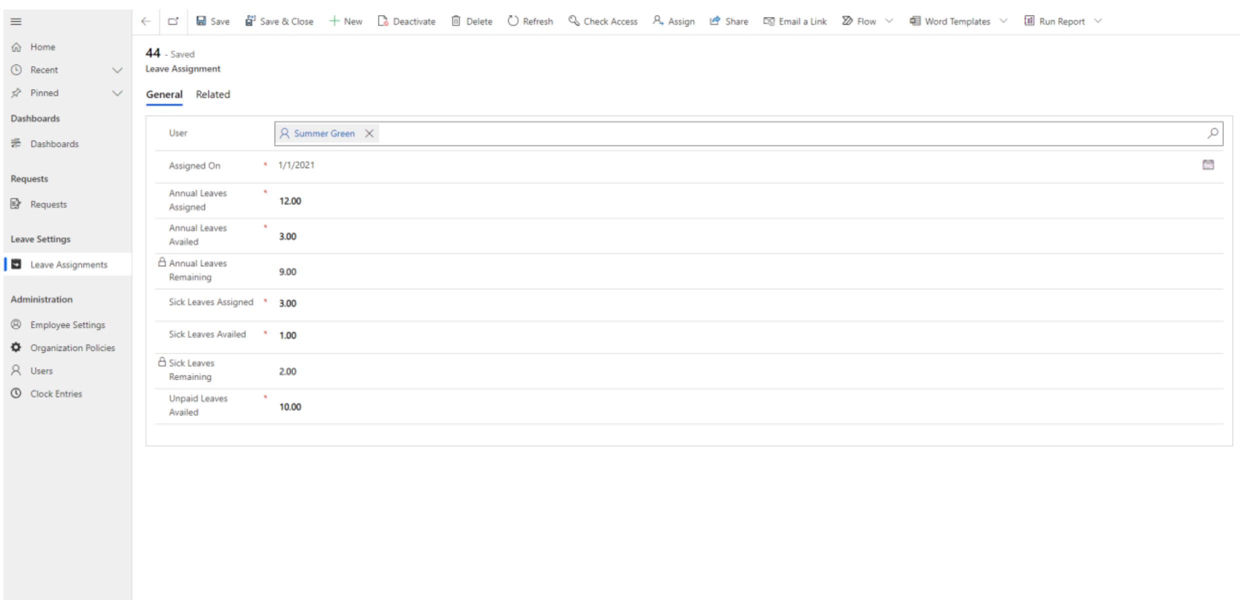
Leave Assignments

and To create a leave assignment for an employee, click ‘Leave Assignments’ on the left pane. On the command bar, click the ‘New button’. The New Leave Assignment form opens with the following fields:

- User: This is a required, lookup field of the Users saved in the Azure AD.
- Assigned On: Provide the date from the date selector from which the assigned leaves will take effect.
- Annual Leaves Assigned: Type the number of annual leaves assigned to the user.

- Annual Leaves Availed: This is a system-calculated manual field, where the admin can input the availed leaves or provide 0 if no leaves have been availed yet, the system counts the number of annual leaves availed when leave assignments are made by the user.
- Annual Leaved Remaining: This is a system-calculated field, that counts the remaining number of annual leaves in the system.
- Sick Leaves Assigned: Type the number of sick leaves assigned to the user.
- Sick Leaves Availed: This is a system-calculated manual field, where the admin can input the availed leaves or provide 0 if no leaves have been availed yet, the system counts the number of sick leaves availed when leave assignments are made by the user.
- Sick Leaves Remaining: This is a system-calculated field, that counts the remaining number of sick leaves in the system.
- Unpaid Leaves Availed: This is a manual input field; the admin can provide a number to save the availed unpaid leaves. The admin can provide 0 if no leaves have been availed.

Click 'Save' on the command bar, the system calculated fields are also refreshed and show the accurate number of leaves in the related fields.



Administration

The admin area is accessed by the Manager. The entities in the area include the policies of the organization, employee information, and the time-in/time-out entries by employees submitted regularly.

Employee Settings

This entity is used to create a record for an employee's pin that is used for time-in and time-out on the Clocky App.

To create a new record, click ‘New’ on the command bar. The New Employee Setting form opens with the following fields:

- User: This is a required, lookup field of the Users saved in the system. Select the user to create a pin for.
- PIN: Provide a unique 4-digit PIN that will be used by the employee in the Clocky app for time-in and time out.

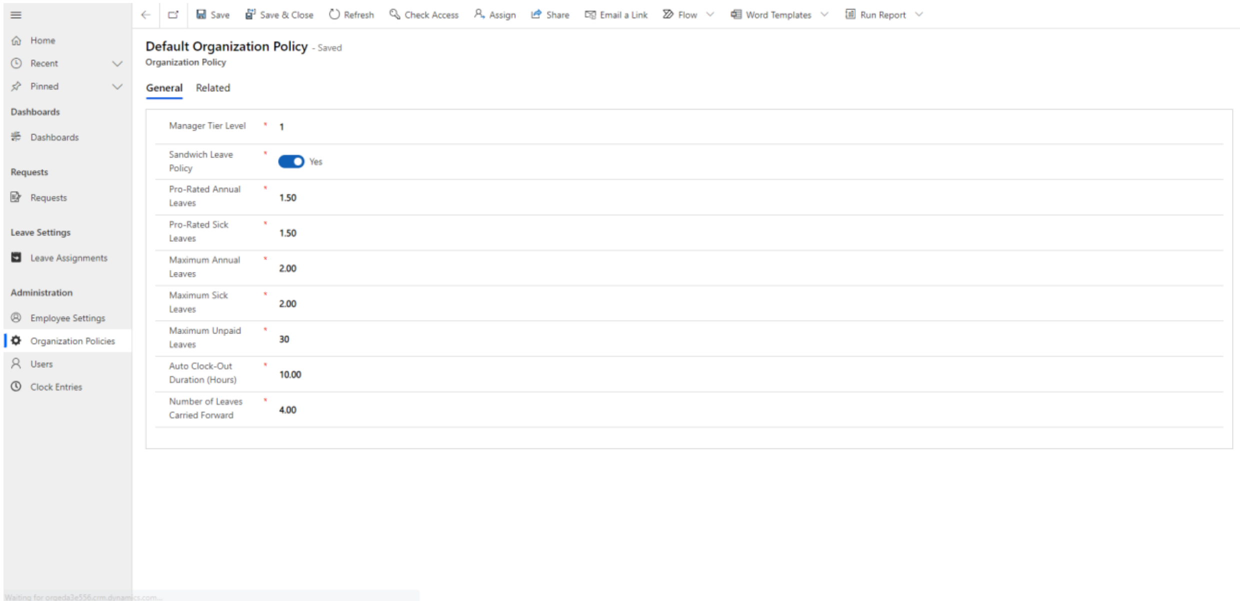
Click Save & Close on the command bar to save the settings.

Organization Policies

Only one policy can be created and effective at a time for all the users in the system. Click ‘New’ on the command bar to create a policy. The New Organization Policy form opens with the following fields:

- Manager Tier Level: Provide the Tier level in this field.
- Sandwich Leave Policy: This is a toggle-based field, set the toggle to yes to enable the sandwich leave policy, set the toggle to no to disable the sandwich leave policy.
- Pro-rated Annual Leaves: Type the number of annual leaves that should be added in the user’s monthly annual leave. An automated flow carries out the process of adding leaves to the user’s remaining annual leaves each month.
- Pro-rated Sick Leaves: Type the number of sick leaves that should be added in the user’s monthly sick leave. An automated flow carries out the process of adding leaves to the user’s remaining sick leaves each month.
- Maximum Advanced Annual Leaves: Type the number of leaves that the user can apply for as advanced leaves. Advanced leaves are applicable if pro-rated annual leaves are utilized. The system calculates the advanced annual leaves in a negative balance.
- Maximum Advanced Sick Leaves: Type the number of leaves that the user can apply for as advanced leaves. Advanced leaves are applicable if pro-rated sick leaves are utilized. The system calculates the advanced sick leaves in a negative balance.
- Auto Clock-Out Duration (Hours): Provide the number of hours that the system should record if a clock-out entry is missing on the Clocky App.
- Number of Leaves Carried Forward: Provide the number of leaves that will be carried forward each year irrespective of the number of leaves remaining in the user system.

Click Save & Close on the command bar to save the policy and let It take effect.



Users

The entity has a list view of all the Users created in the Azure AD. Click the User to open the user information.

Summary

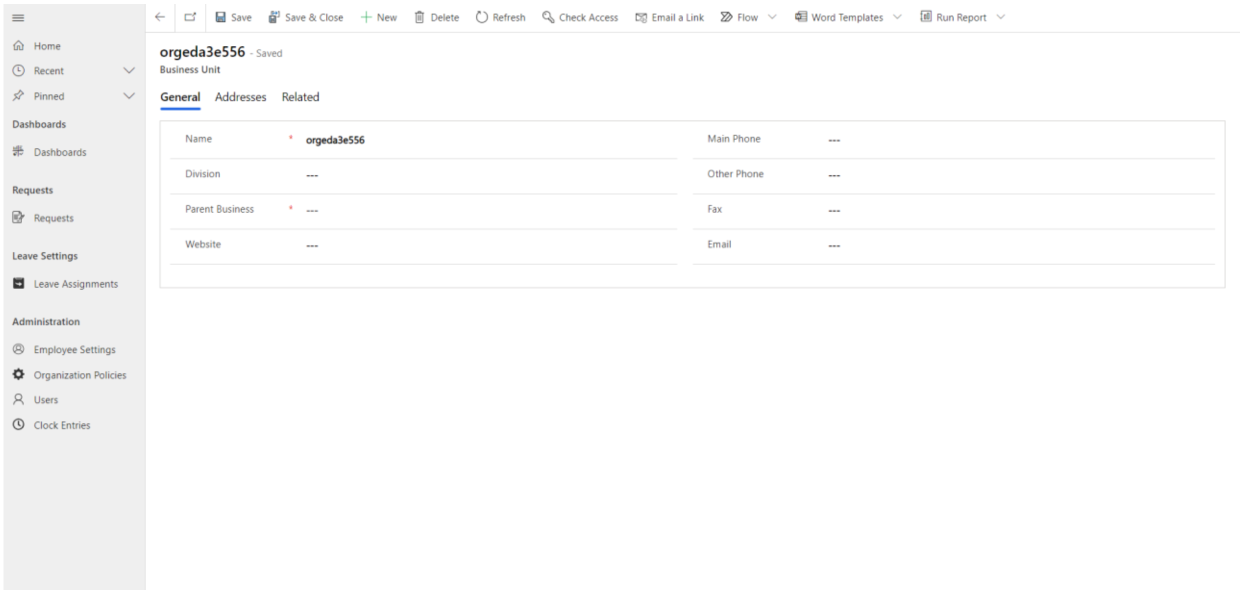
In the 'Summary' tab the main user information is mentioned below:

- Account Information:
    - User Name: This is a default field, containing the username of the employee.
- User Information:
    - First Name: Type the first name of the User to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns.
    - Last Name: Type the last name of the User to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns.
    - Title: Type the job title of the User to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns.
    - Mobile Phone: Type the mobile phone number for the User.
    - Main Phone: Type the mobile phone number for the User.
    - Clock-in Enabled: This is a toggle-based field. Set the toggle to enable or disable time in and time out on the Clocky App.
    - User Location: Provide the User location.

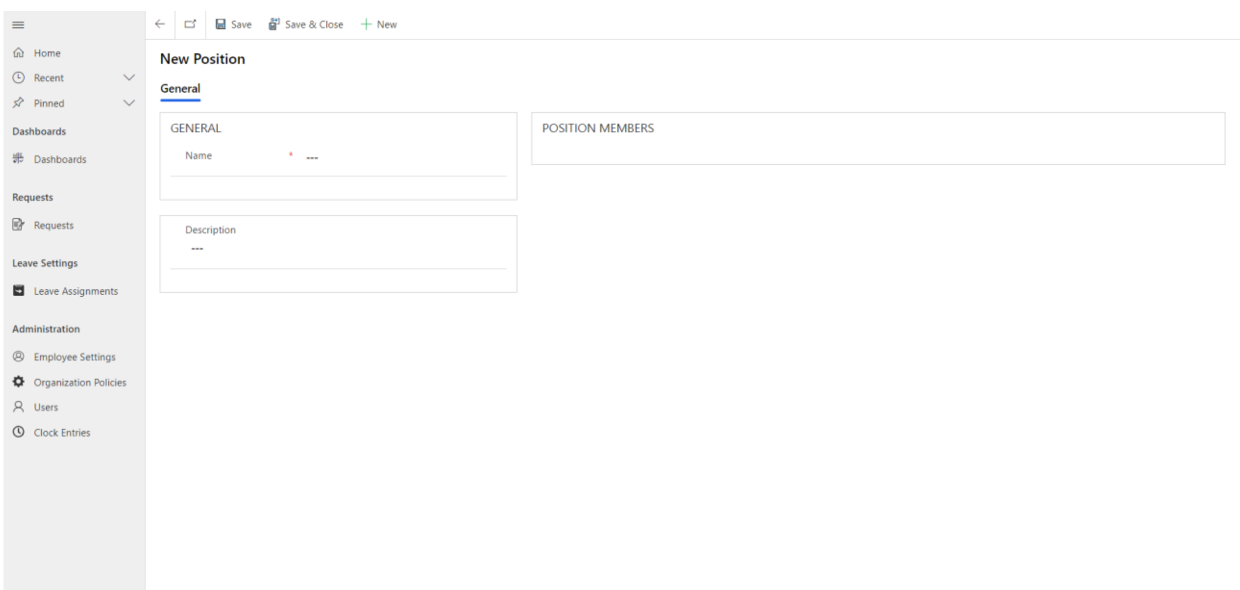
- Team Members:
    - The list of Teams the User is added to.

- Organization Information:

- Business Unit: Business units are mapped to an organization's departments or divisions. Lookup the existing Business Units or create new and define the Name, Division, and other basic details.

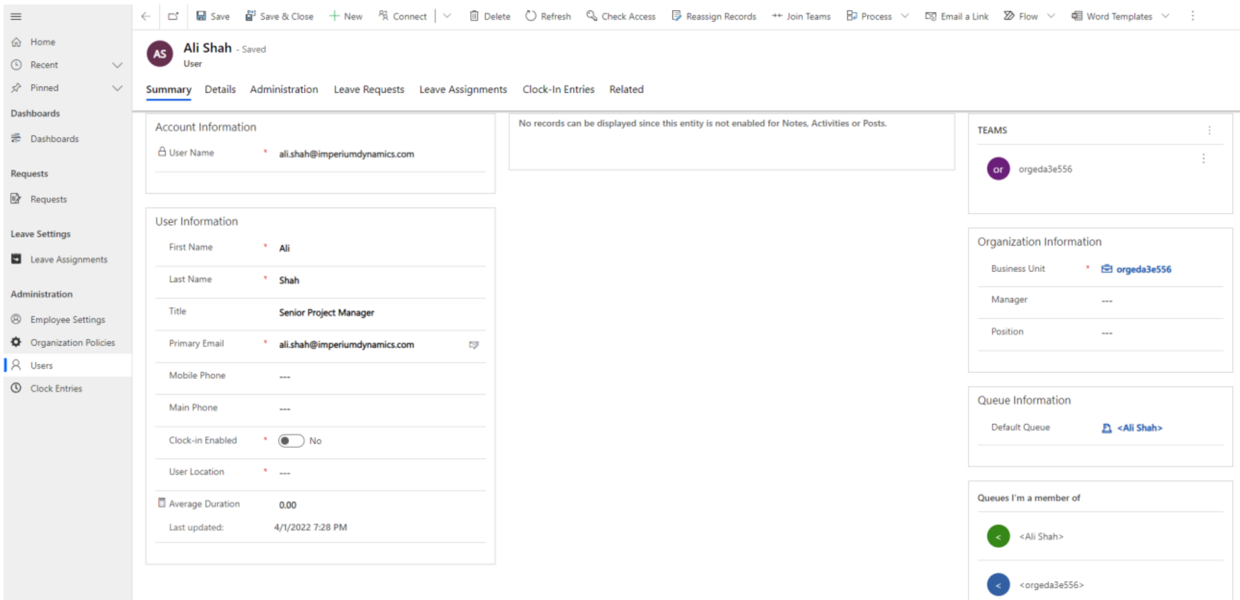


- Manager: The lookup of Users – the manager is the user set as the reporting manager in the Microsoft Office 365 hierarchy.
- Position: This is a lookup of Positions existing in the system or create a new position with the Name and Description of the Position.



- Queue Information
    - Default Queue: This is the lookup of the default system Queue – each user has an individual queue which can be selected here. This is mostly used in the Dynamics 365 customer service module where the agents have the cases assigned to queues.

- Queues I Am Member Of: The list of Queues in which the User is added.



Click Save on the command bar to save the user information.

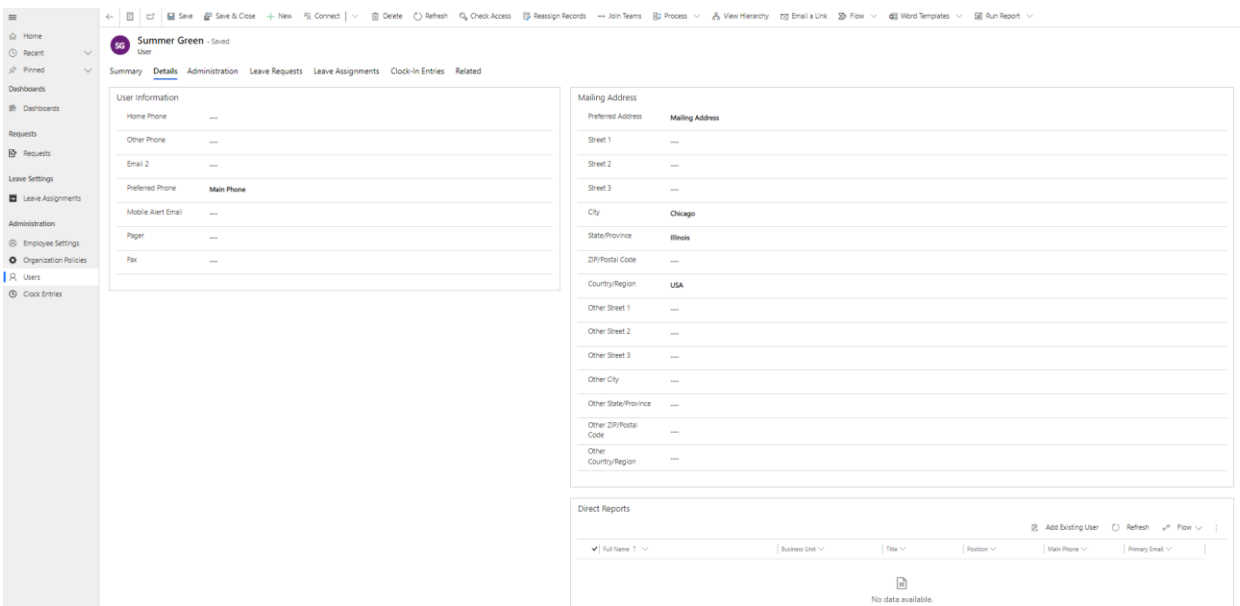
Details

Navigate to the 'Details' tab to enter user specific personal information.

- User Information: The section consists of the basic user information as explained below:
    - Home Phone: The home phone number of the user.
    - Other Phone: Any other phone number of the user.
    - Email 2: Provide a secondary email address of the user to the system.
    - Preferred Phone: Select the phone number that is preferable for the user from the given options based on the number given in each option.
    - Mobile Alert Email: The email address configured for the phone.
    - Pager: Provide pager number if any.
    - Fax: Provide fax number if any.
- Mailing Address:
    - Preferred Address: Select the address that should be preferred for the mail.
    - Street 1: Type the first line of the mailing address.
    - Street 2: Type the second line of the mailing address.
    - Street 3: Type the third line of the mailing address.
    - City: Type the city of the mailing address.

- State/ Province: Type the state or province of the mailing address.
    - ZIP/Postal Code: Type the ZIP Code or postal code for the mailing address.
    - Country/Region: Type the country or region for the primary address.
    - Other Street 1: Type the first line of the other mailing address.
    - Other Street 2: Type the second line of the other mailing address.
    - Other Street 3: Type the third line of the other mailing address.
    - Other City: Type the city of the other mailing address.
    - Other State/ Province: Type the state or province of the other mailing address.
    - Other ZIP/Postal Code: Type the ZIP Code or postal code for the other mailing address.
    - Other Country/Region: Type the country or region for the other primary address.
- Direct Reports: A sub grid to add users to whom the user directly reports to.

Click Save on the command bar to save the form.

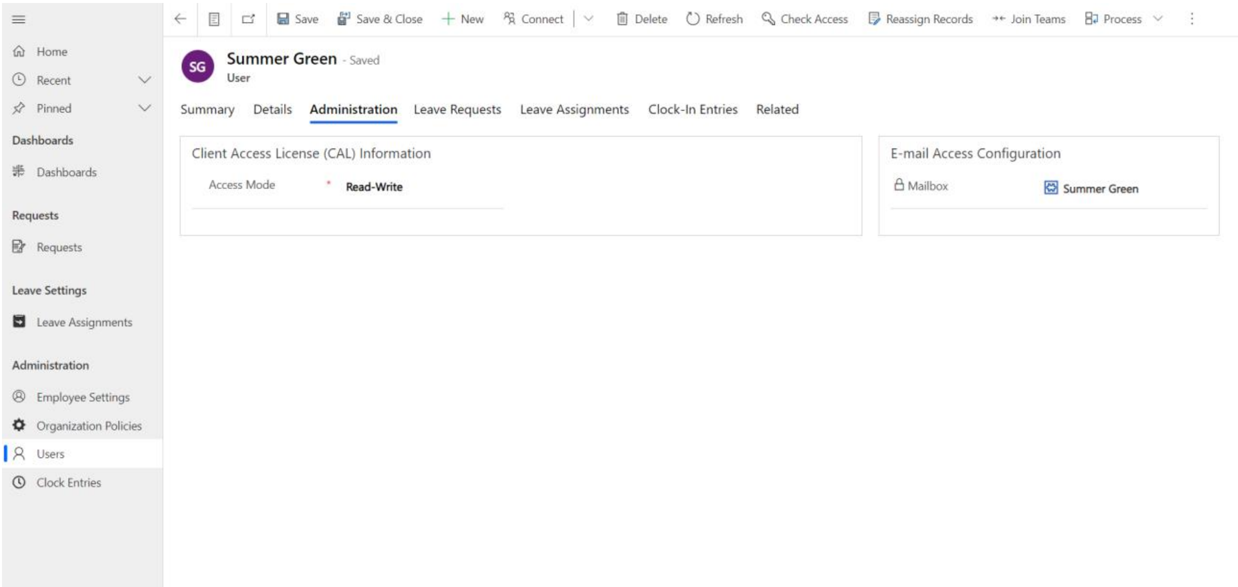


Administration

The Administration tab has the display of the permission level given to the user. This can be modified by the user having Admin access only.

- Client Access License (CAL) Information: The section has one field only:
    - Access Mode: There are three options available to choose:
        - Read-Write: This allows the user to read and write data in the tables.
        - Administrative: Allows admin rights over all tables in the system.
        - Non-interactive: Allows the user to be able to access and authenticate customer engagement apps without requiring a license.
- E-mail Access Configuration:
    - Mailbox: This is a locked field with the email of the user defaulted.

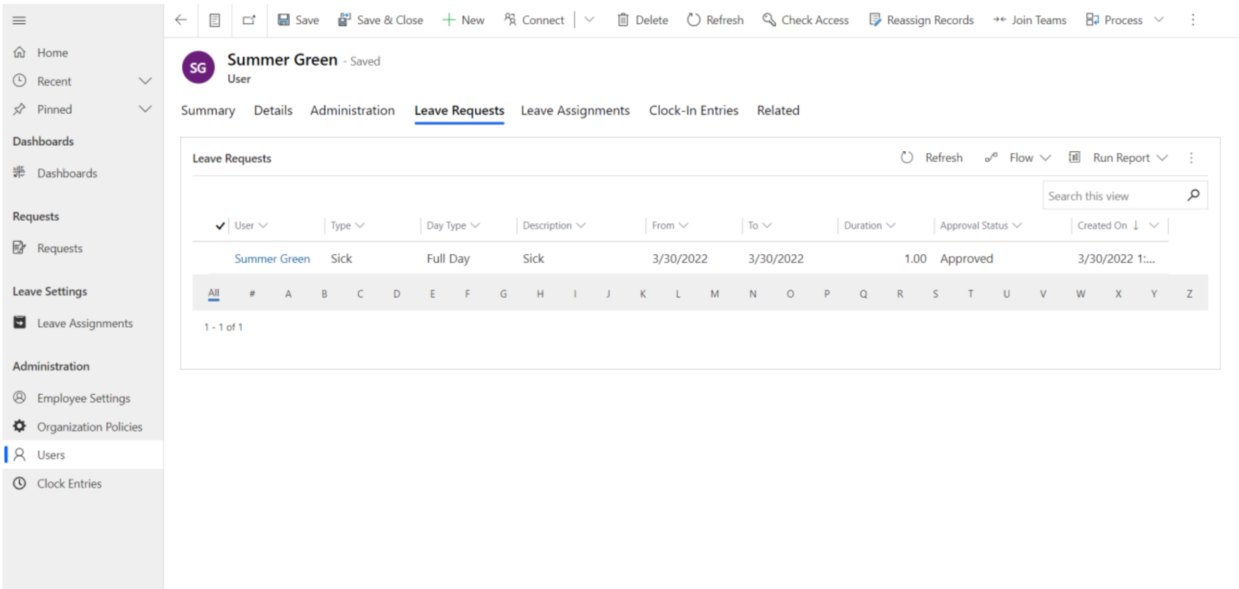
Click Save on the command bar to save changes.



Leave Requests

A sub-grid that displays the list view of the leave requests submitted by the user. The sub-grid columns include:

- User
- Type
- Day Type
- Description
- From
- To
- Duration
- Approval Status
- Created On

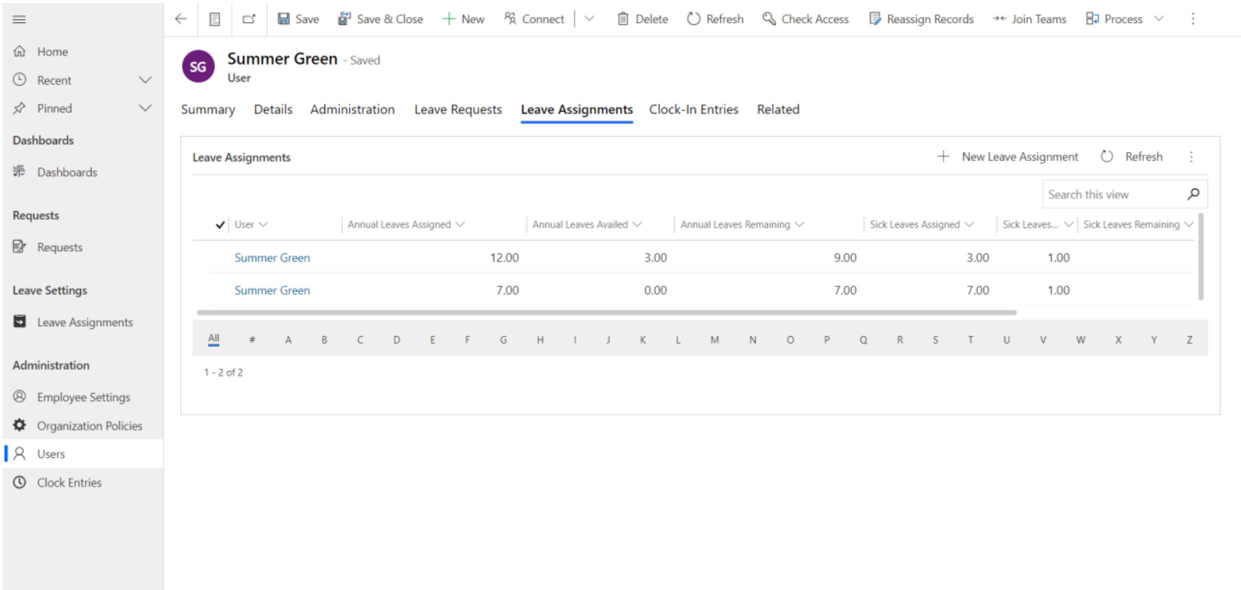


Leave Assignments

The sub-grid has a list view of the leaves assigned to the user by the Manager. The column includes the following fields:

- User
- Annual Leaves Assigned
- Annual Leaves Availed
- Annual Leaves Remaining
- Sick Leaves Assigned
- Sick Leaves Availed
- Sick Leaves Remaining

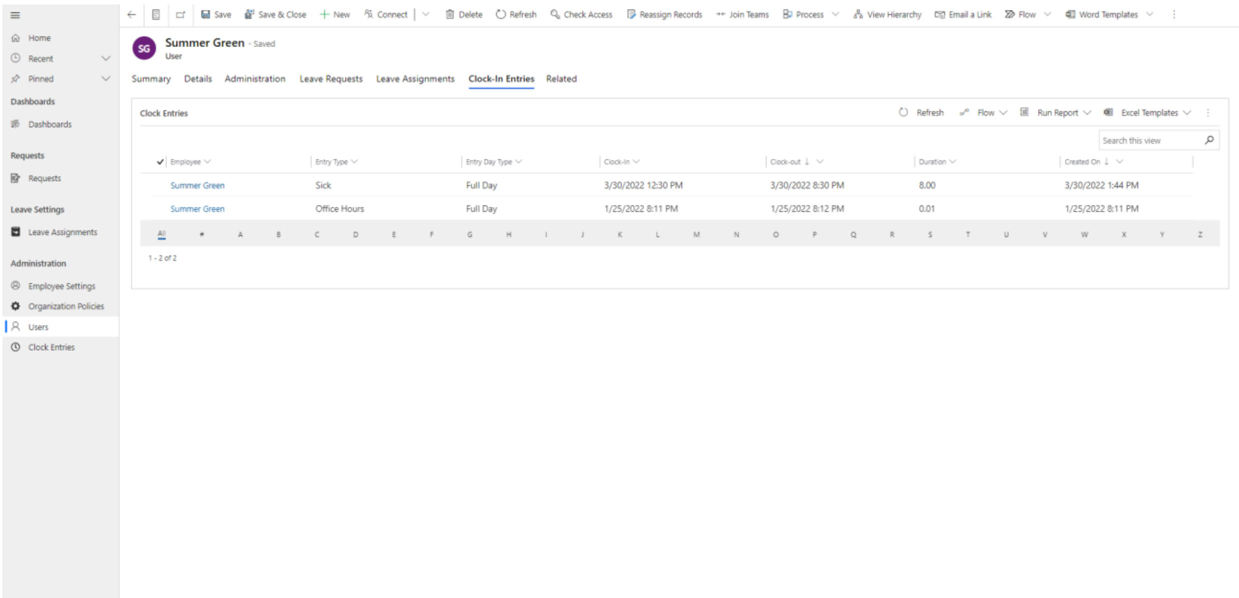
The sub-grid has a button 'New Leave Assignment' from where the Admin can create a new leave assignment for the user.



Clock-In Entries

A sub-grid with the list view of the clock-in and clock-out timings of the users based on the leaves availed and displaying the hours spent each day. The list view has the following data:

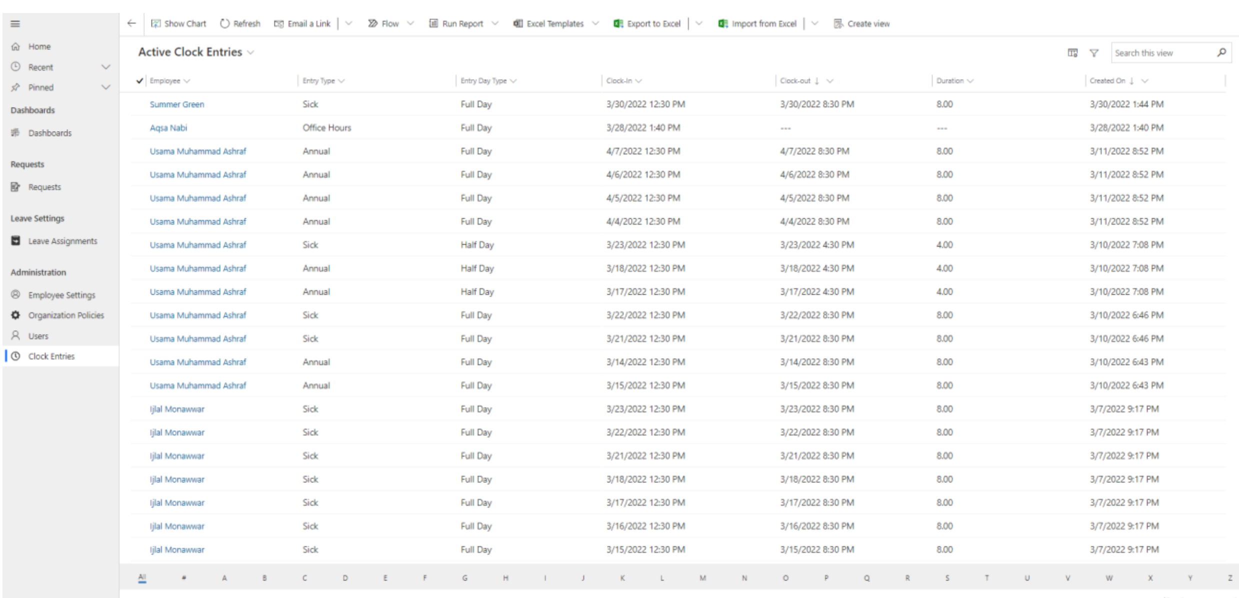
- Employee
- Entry Type: The data shows the leave type when the employee is on leave and displays 'Office Hours' when the employee joins work from the office.
- Entry Data Type: The data shows if the workday was half-day or full-day.
- Clock-In: The clock in time of the employee.
- Clock-Out: The clock out time of the employee.
- Duration: The system calculates the working hours based on the clock-in and clock-out time.
- Created On: The creation date of the clock-in entries.



Clock Entries

The list view of the time entries of the users. The list view has the following columns:

- Employee: Name of the employee.
- Entry Type: The data shows the leave type when the employee is on leave and displays ‘Office Hours’ when the employee joins work from the office.
- Entry Data Type: The data shows if the workday was half-day or full-day.
- Clock-In: The clock in time of the employee.
- Clock-Out: The clock out time of the employee.
- Duration: The system calculates the working hours based on the clock-in and clock-out time.
- Created On: The creation date of the clock-in entries.



Dashboards

The system has two types of dashboards.

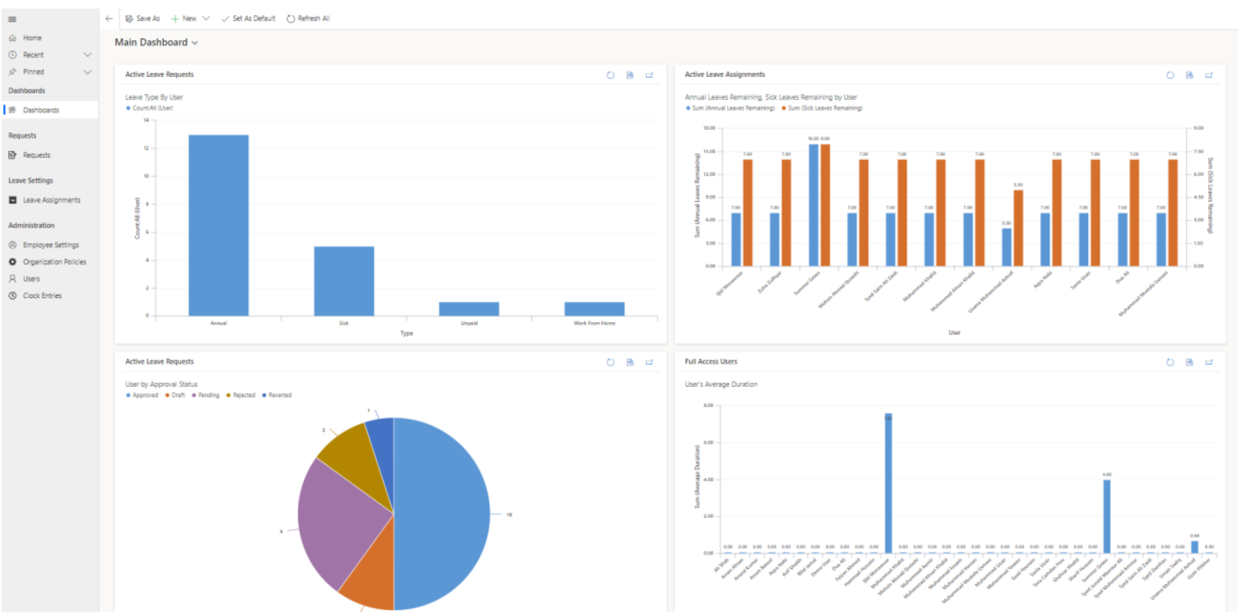
Dashboards

There are two system dashboards to represent real-time data for the employees and managers to track the leave assignments.

Main Dashboard

The dashboard has a representation of charts based on the following KPIs.

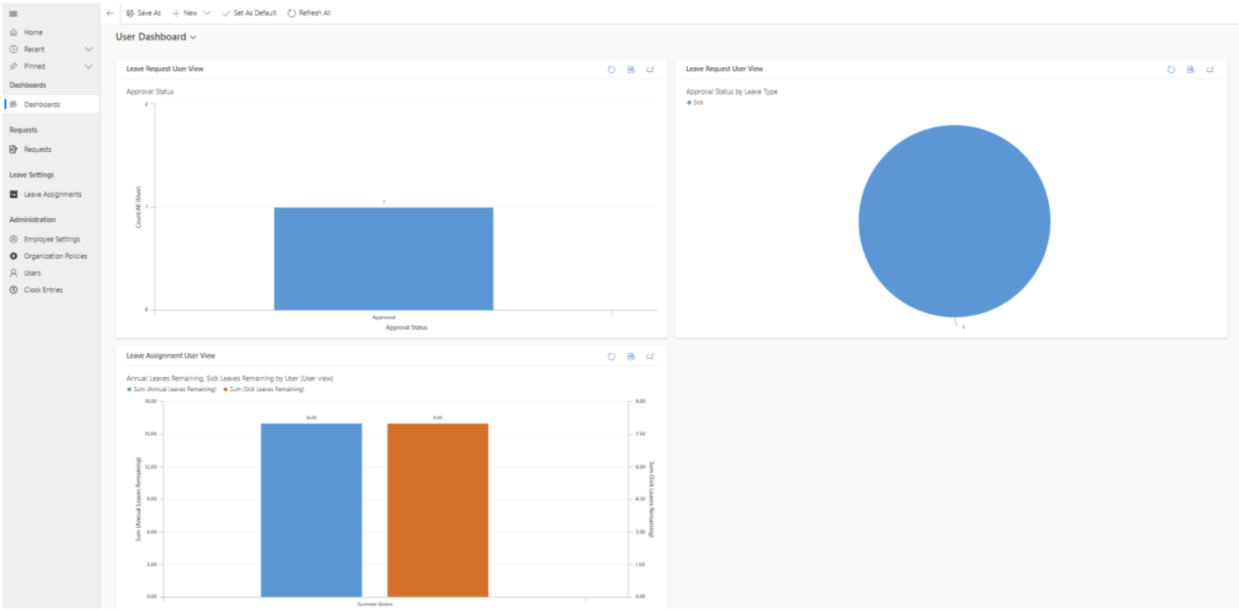
- Active Leave Requests: Leave Type By User. The chart represents real-time data - the number of the type of leaves requested by the employee.
- Active Leave Assignments: Annual Leaves Remaining, Sick Leaves Remaining by User. The chart represents the real-time data – The number of annual leaves and sick leaves remaining by the employees.
- Active Leave Requests: User by Approval Status. The chart represents the real-time data – the number of leave requests of each type by their status.



User Dashboard

The dashboard has a representation of charts for the logged in user based on the following KPIs.

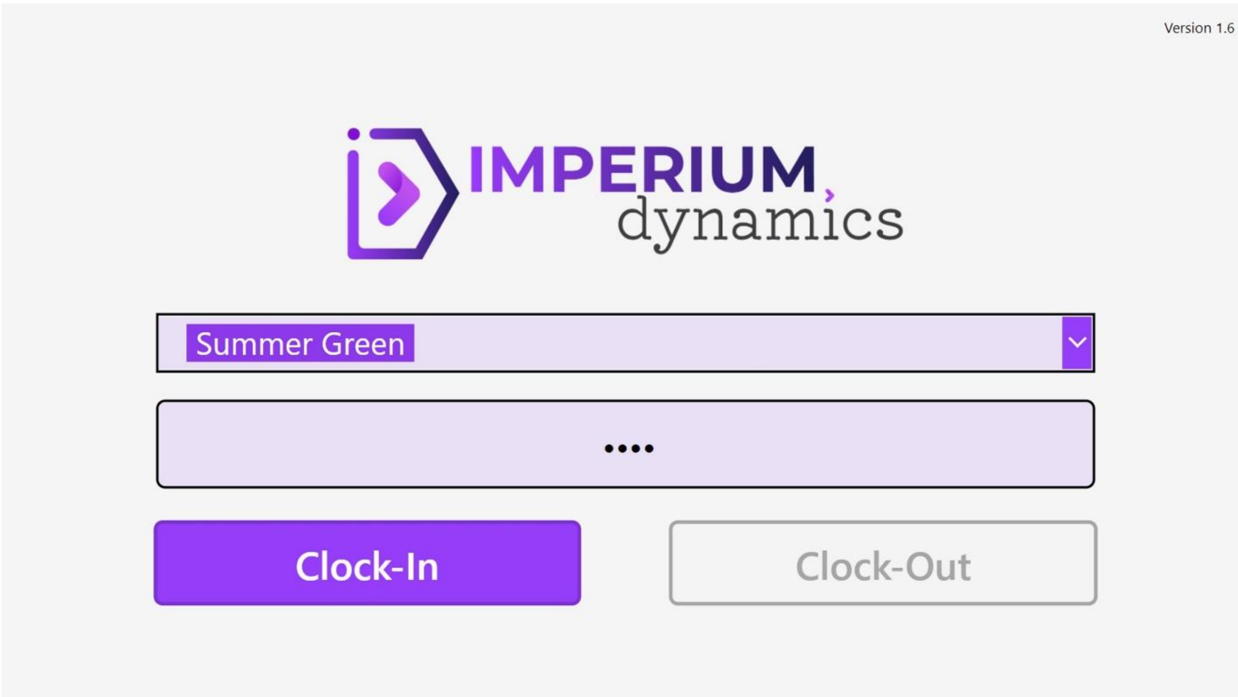
- Leave Request User View: Approval Status. The chart represents real-time data – the number of leaves that are approved and/or reverted.
- Leave Request User View: Approval Status by Leave Type. The chart represents real-time data – the number of leave requests of each type by their status.
- Leave Assignment User View. Annual Leaves Remaining, Sick Leaves Remaining by User. The chart represents the real-time data – The number of annual leaves and sick leaves remaining of the employee.


Save As
New
Set As Default
Refresh All
User Dashboard
Home
Recent
Pinned
Dashboards
Dashboards
Requests
Requests
Leave Settings
Leave Assignments
Administration
Employee Settings
Organization Policies
Users
Clock Entries
Leave Request User View
Approval Status
Approved
Approval Status
Leave Request User View
Approval Status by Leave Type
Sick
Leave Assignment User View
Annual Leaves Remaining, Sick Leaves Remaining by User (User view)
Sum (Annual Leaves Remaining)
Sum (Sick Leaves Remaining)
Summer Green

Imperium Clocky

Imperium Clocky is a Canvas App, used by the employees to clock-in and clock-out. The Canvas App is simple to use with an easy interface. Login using the Clocky app with three steps:

- Select the User name from the lookup
- Enter the 4 digit pin – the system enables the 'Clock-In/Clock-Out' option based on the timings and location set for the user by the manager.
- Click the enabled option 'Clock-In/Clock-Out'



The Clocky app saves the time when the button was entered and displays the time in the Imperium Employee Management 'Clock Entries' table.

Security Roles

There are two security roles for the system users, as defined below.

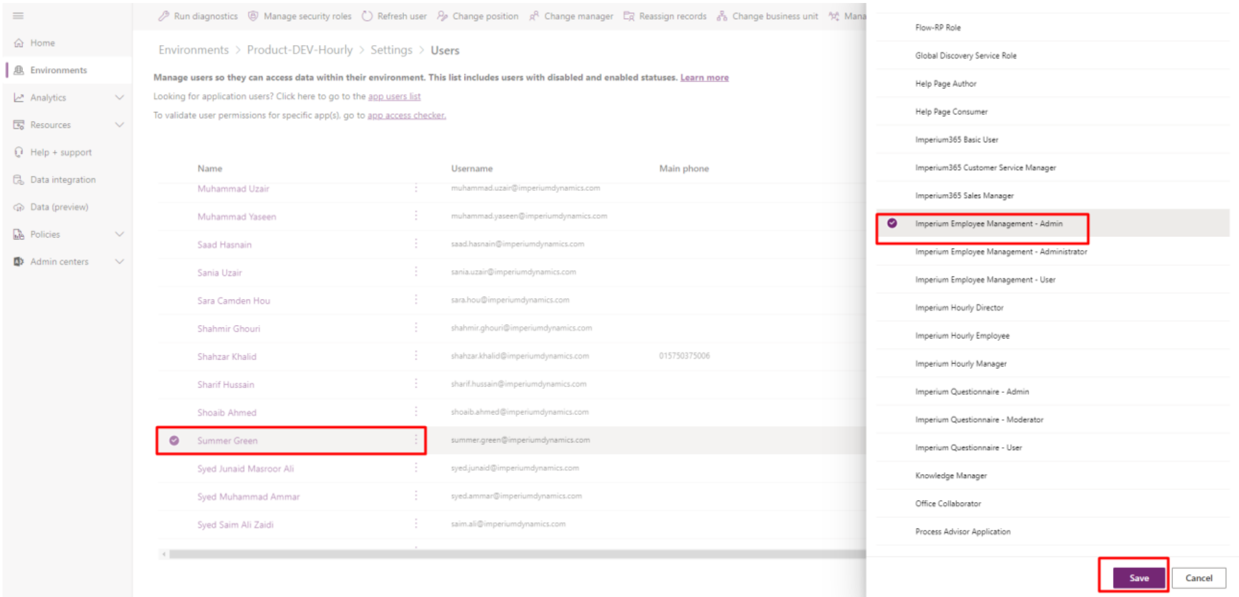
Imperium Leave Management - Admin

The security role provides full access to the system users – the managers. The security role has the following privileges to the system tables

Entities	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Leave Assignments	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Employee Settings	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Organization Policies	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Users	No	Yes	Yes	No	Yes	Yes	Yes	Yes
Clock Entries	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Main Dashboard	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
User Dashboard	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Navigate to https://admin.powerplatform.microsoft.com/ and click 'Environments' on the left pane. Select the environment name to configure the security roles for, and click the 'Settings' button on the command bar. Expand the 'Users + Permissions' section and click 'Users.' The system opens a list of all the system users. Select the username, and click on the ellipsis, click 'Manage Security Roles' in the expanded menu. Select the 'Imperium Employee Management – Admin' role from the list of security roles. Click 'Save' on the tab.

NOTE: The security roles may take a few minutes to take effect on the system. Refresh the window or clear the cache for the changes to take effect.



Imperium Employee Management – User

The security role provides limited access to the system users – the employees. The security role has the following privileges to the system users:

Entities	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Leave Assignments	No	Yes	No	No	No	No	Yes	Yes
Employee Settings	No	Yes	Yes	No	No	Yes	Yes	Yes
Organization Policies	No	Yes	No	No	No	No	No	No
Users	No	Yes	No	No	No	No	No	No
Clock Entries	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Main Dashboard	No	Yes	No	No	No	No	No	No
User Dashboard	No	Yes	No	No	No	No	No	No

Navigate to https://admin.powerplatform.microsoft.com/ and click ‘Environments’ on the left pane. Select the environment name to configure the security roles for, and click the ‘Settings’ button on the command bar. Expand the ‘Users + Permissions’ section and click ‘Users.’ The system opens a list of all the system users. Select the username, and click on the ellipsis, click ‘Manage Security Roles’ in the expanded menu. Select the ‘Imperium Employee Management – User’ role from the list of security roles. Click ‘Save’ on the tab.

NOTE: The security roles may take a few minutes to take effect on the system. Refresh the window or clear the cache for the changes to take effect.