

Quick Start

Advanced Tools

Get to know WorkDo!



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V220414

1 Must Knows

- 1.1 Tools at Your Disposal
- 1.2 Set Your Tools
- 1.3 Tool Dependency
- 1.4 Know Your Tools

2 Common Features

- 2.1 Tool Activation & Tool Roles
- 2.2 User Guides
- 2.3 Flexibility Caters All Workplaces
- 2.4 Everything Begins with Do
- 2.5 Tool Data input
- 2.6 View Records
- 2.7 Edit
- 2.8 Frequently Used Tools
- 2.9 Streamlined Workflow

3 Collaboration Tools

- 3 Advanced Tools

1. Must Knows

- 1.1 [Tools at Your Disposal](#)
- 1.2 [Set Your Tools](#)
- 1.3 [Tool Dependency](#)
- 1.4 [Know Your Tools](#)

1.1 Tools at Your Disposal

WorkDo integrates tools that effectively improve workflow and productivity!

1.1 Tools at Your Disposal



Workflow Management

Dashboard, Wall,
Calendar, Workflow



Approval Sign off

Expenses
Approvals



HR Management

HR
Attendance
Check-In
Leave, Leave Pro
Overtime, Shift
Payroll



CRM

CRM
Phonebook



Digital Management

Conf. Rm,
Cashbook
We Buy, IOU

1.2 Set Your Tools

Use WorkDo across different devices.

App - Simple and intuitive to use.

Web - Easy setting & data management.

1.2 Set Your Tools : Preferred Setting Device

Advanced Tool	Web	App	Preferred Device
HR, Payroll	●		Web - Supports all functions and is used for initial setup.
Attendance		●	App - Essential for initial setup. A Tablet is required for a facial recognition clock in/out.
Check In, Leave		●	App - Can be setup using the app alone.
Leave Pro	●		Web - Supports all functions and is used for initial setup.
Shift, Timesheet	●		Web - Supports all functions and is used for initial setup.
Overtime		●	App - Can be setup using the app alone.
Expenses Approvals		●	App - Can be setup using the app alone.
Conf. Rm	●		Web - Supports all functions and is used for initial setup.
CRM, Cashbook		●	App - Can be setup using the app alone.
Phonebook, We Buy		●	App - Can be setup using the app alone.

1.3 Tool Dependency

A dedicated tool box for your workplace, groups, and buddies.

Different tools for different settings and purposes.

Tool dependency is crucial to achieving semi-auto processing.

1.3 Tool Dependency

Advanced Tool	Workplace	Groups	Buddies	Dependency
HR	●			
Payroll	●			HR Dependent
Attendance, Check In	●			HR Dependent
Leave, Leave Pro	●			HR Dependent
Shift	●			HR Dependent
Overtime	●			HR Dependent
Timesheet	●			HR Dependent
Approvals, Expenses	●			HR Dependent
CRM, Conf. Rm	●			
Phonebook, Cashbook	●	●	●	
We Buy, IOU	●	●		

1.4 Know Your Tools

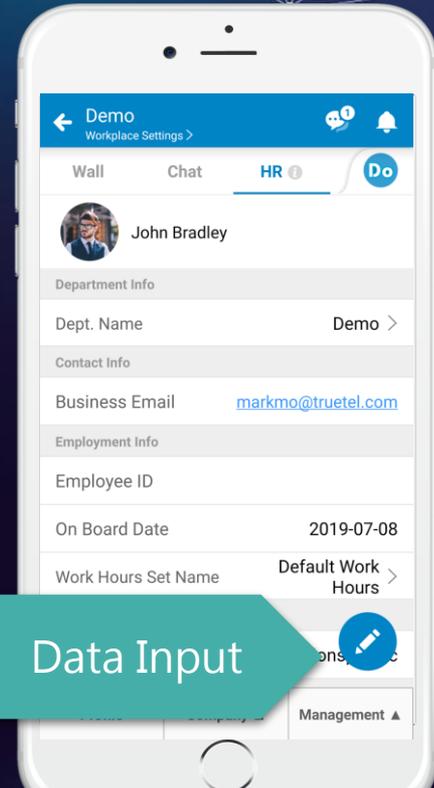
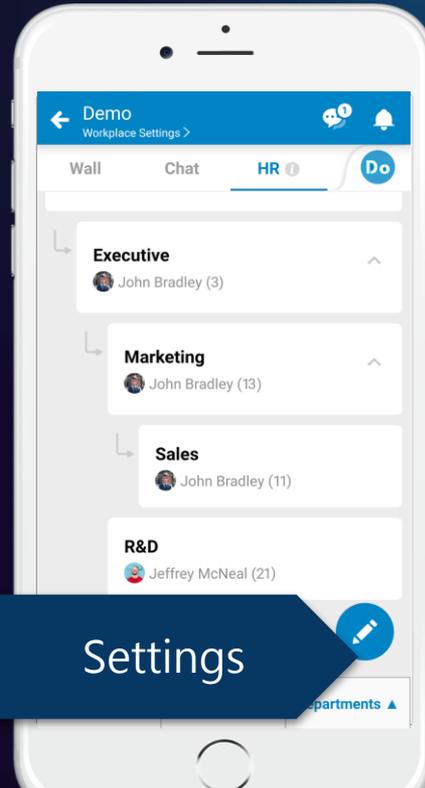
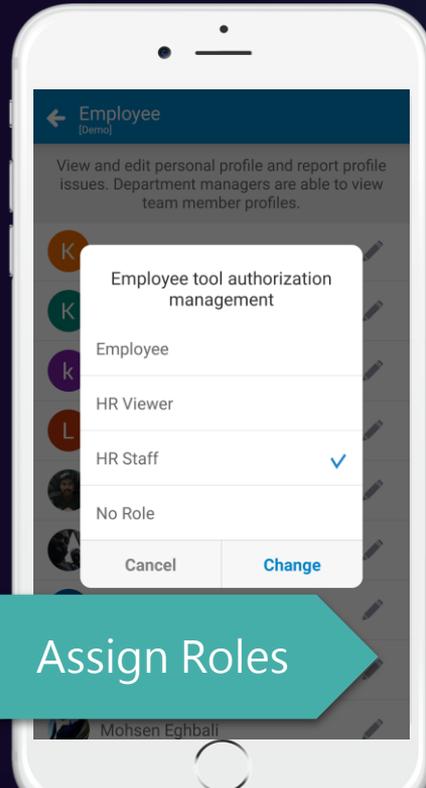
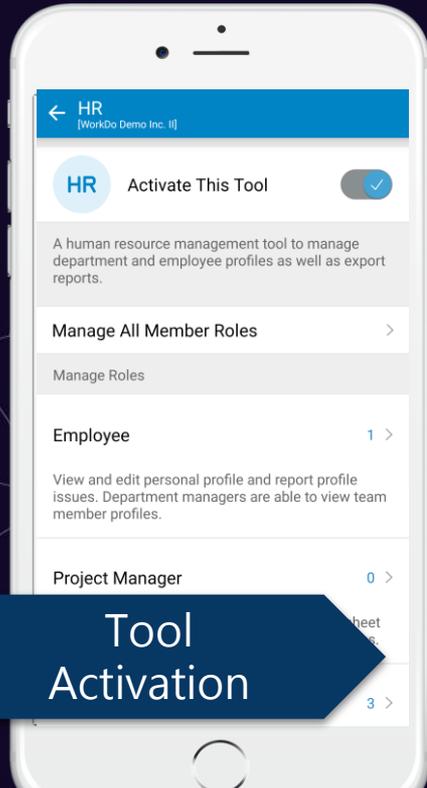
Activate the tools.

Set tool roles.

Set tool settings.

Input data.

1.4 Know Your Tools



2. Common Features

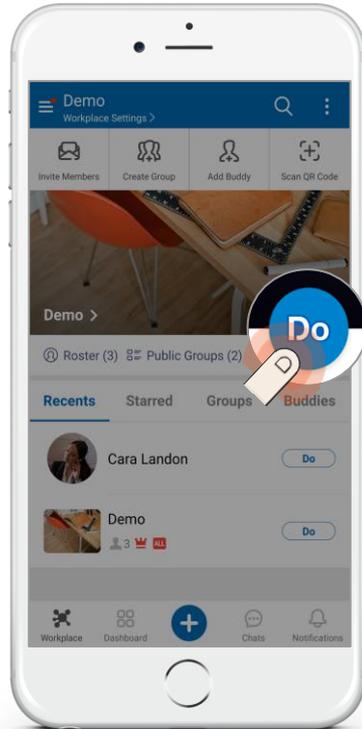
- 2.1 [Tool Activation & Tool Roles](#)
- 2.2 [User Guides](#)
- 2.3 [Flexibility Caters All Workplaces](#)
- 2.4 [Everything Begins with Do](#)
- 2.5 [Tool Data Input](#)
- 2.6 [View Records](#)
- 2.7 [Edit](#)
- 2.8 [Frequently Used Tools](#)
- 2.9 [Streamlined Workflow](#)

2.1 Tool Activation & Tool Roles

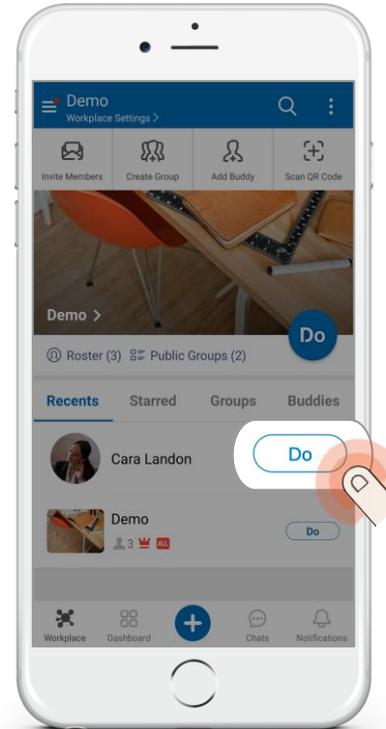
Assign tool roles for access control.

Compartmentalize information without hindering productivity.

2.1 Tool Activation & Tool Roles



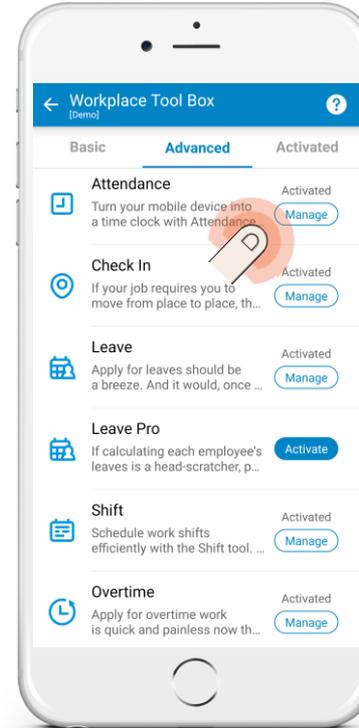
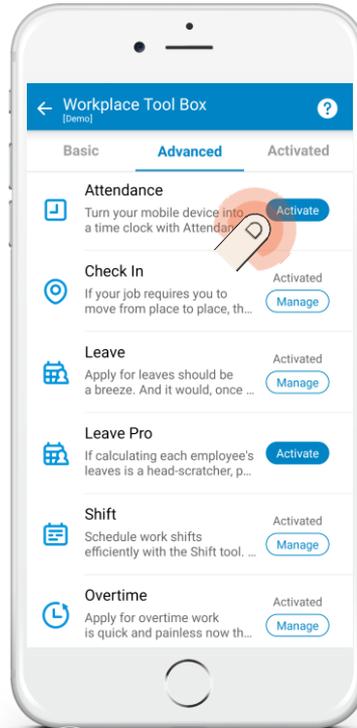
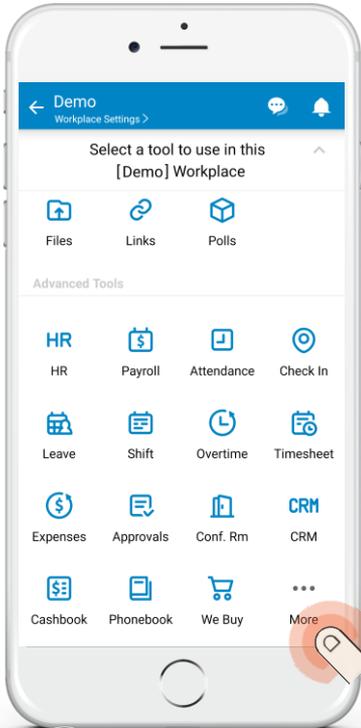
There is a tool box for workplace, groups, buddies



01_a Workplace > Do

01_b Workplace > Groups / Buddies > Do

2.1 Tool Activation & Tool Roles

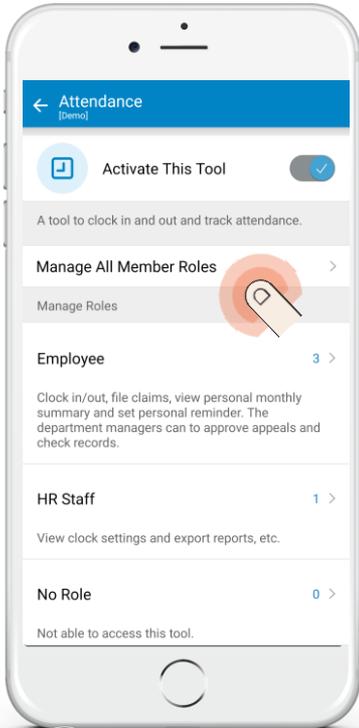


02 Workplace Toolbox

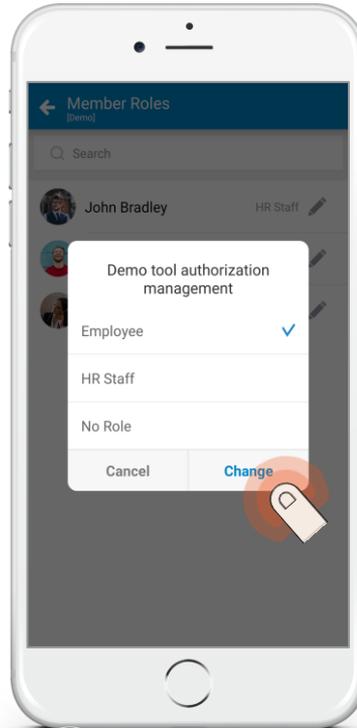
03 Advanced > Activate

04 Manage

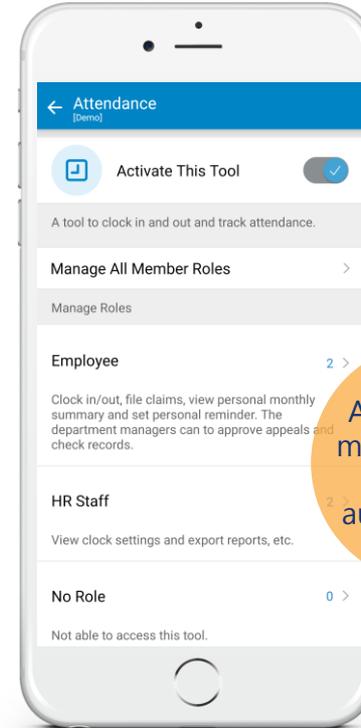
2.1 Tool Activation & Tool Roles



05 Manage All Member Roles



06 Select a New Role > Change



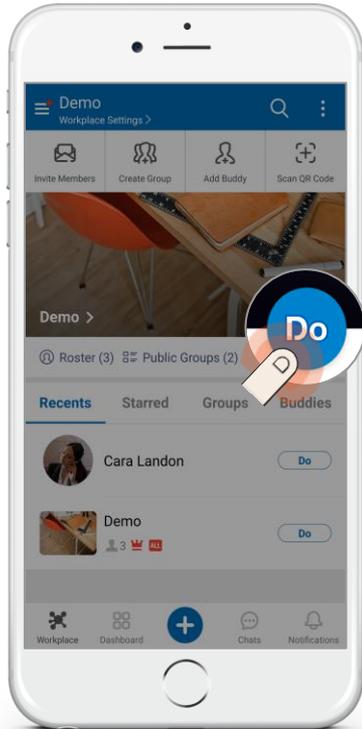
07 Done!

A list view of members with each authorization

2.2 User Guides

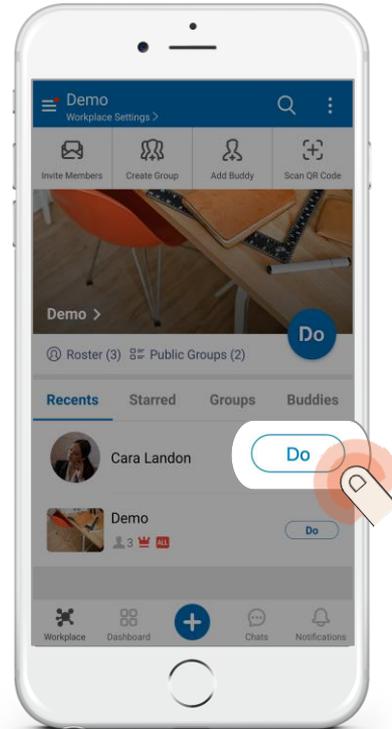
The User Guides Contains Everything You Need to Know!

2.2 User Guide Download



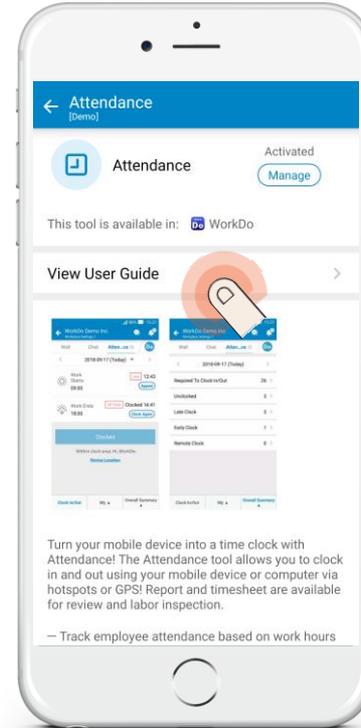
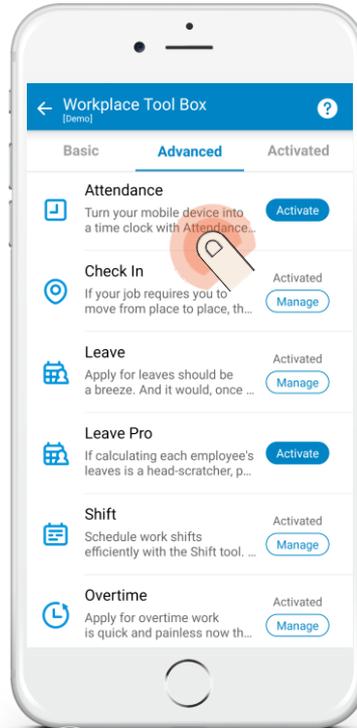
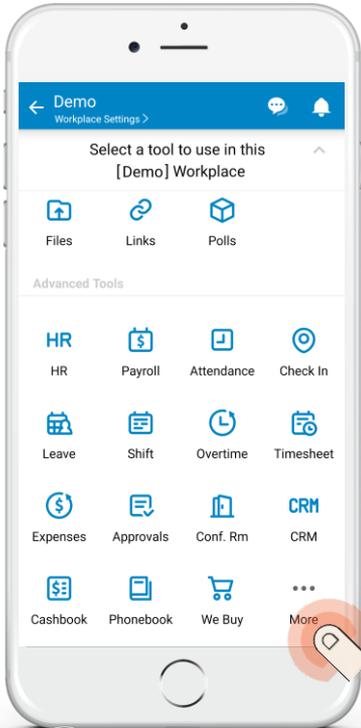
01_a Workplace > Do

Same rule applies to the workplace, groups & buddies



01_b Workplace > Groups / Buddies > Do

2.2 User Guide Download



02 Workplace Toolbox

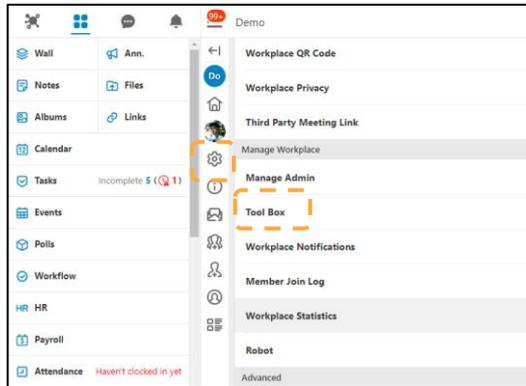
03 Select a Tool

04 View User Guide

2.2 User Guide Download - Web

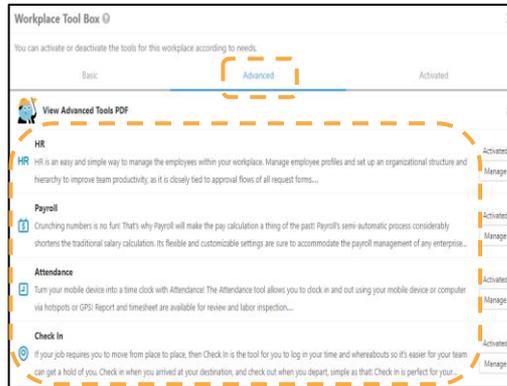
01

Click Workplace Settings > Tool Box



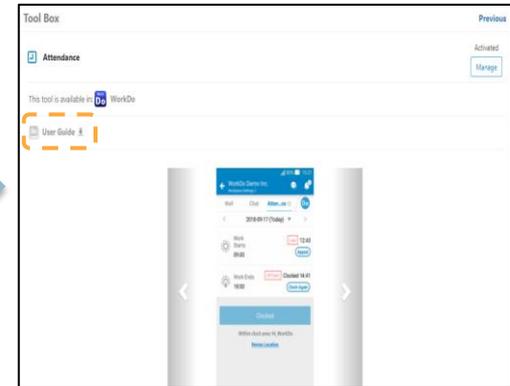
02

Click Advanced Tab > Select a Tool



03

Click User Guide to Begin Download

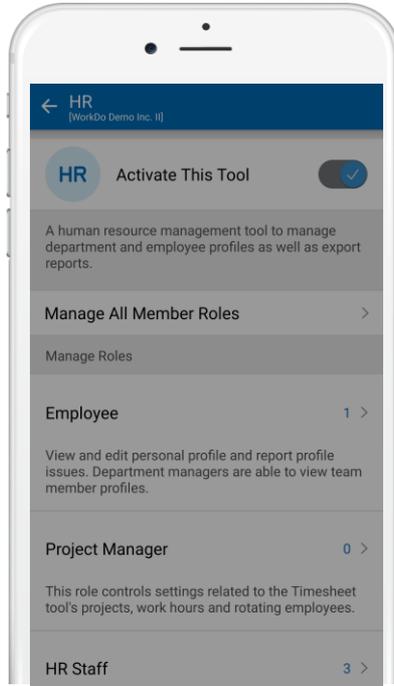


2.3 Flexibility Caters All Workplaces

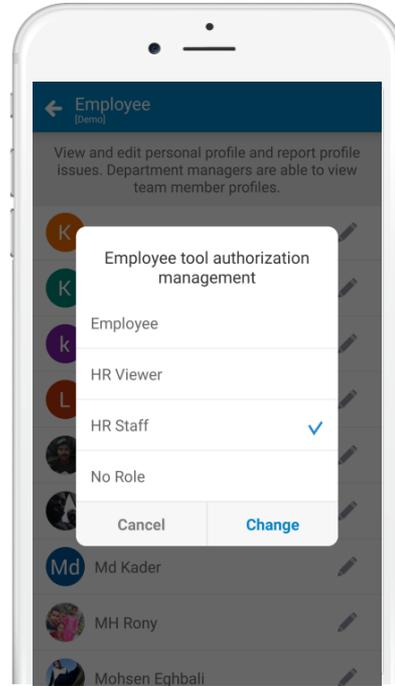
Customize the settings to reflect
how your workplace actually functions!

2.3 Flexibility Caters All Workplaces

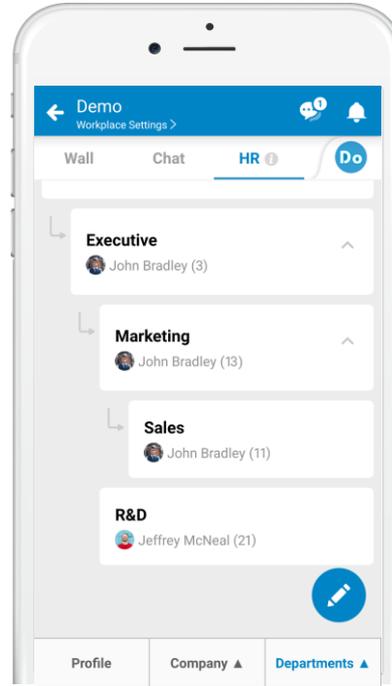
Tool activation



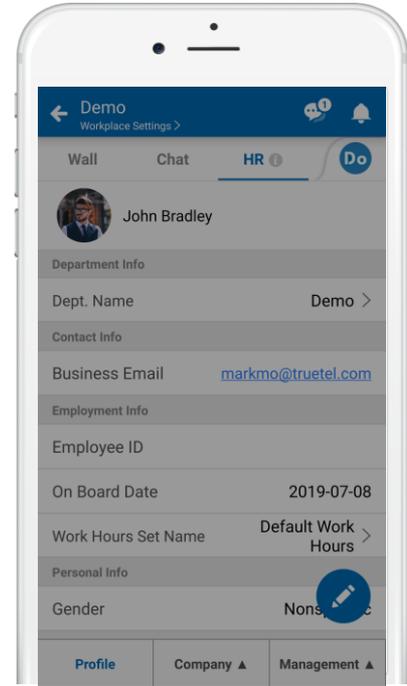
Set tool roles



Basic settings



Data input



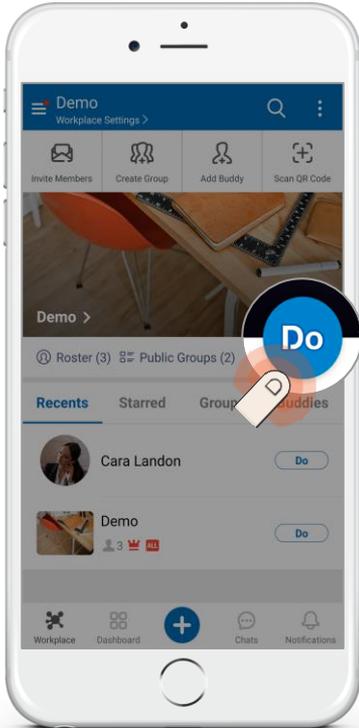
2.4 Everything Begins with Do

Workplace, Groups, Buddies

Different tools at each level

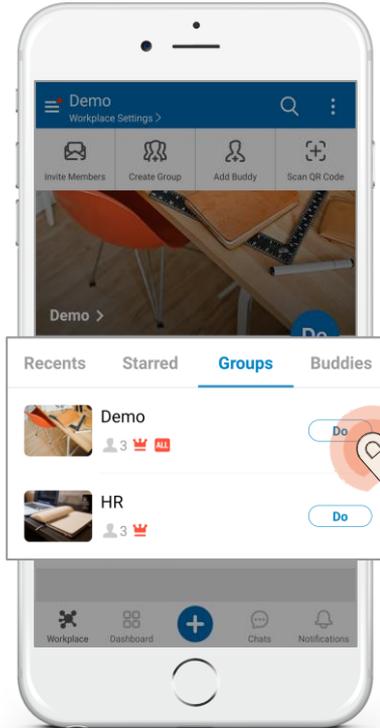
Just click Do!

2.4 Everything Begins with Do



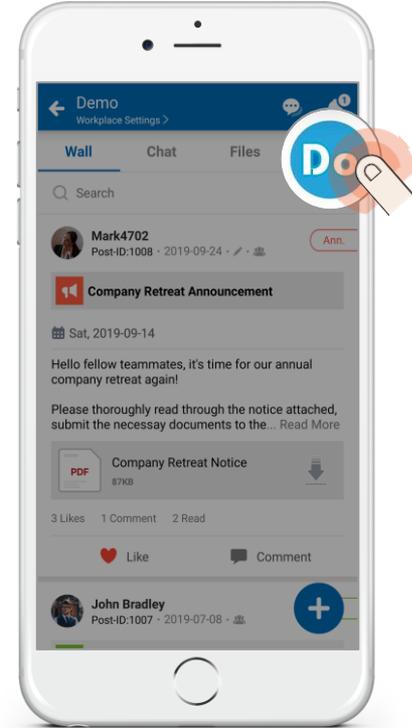
01a Workplace > Do

Or



01b Workplace > Groups, Buddies > Do

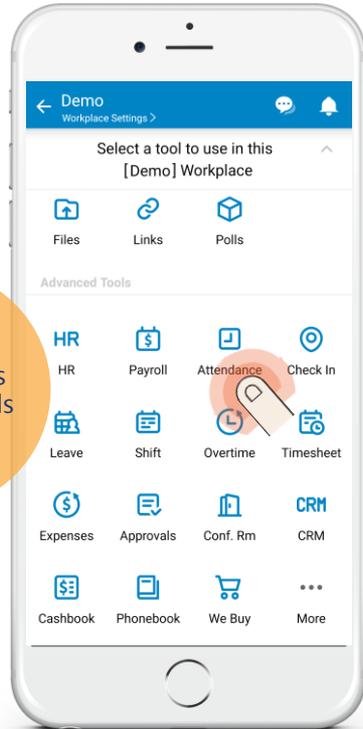
Or



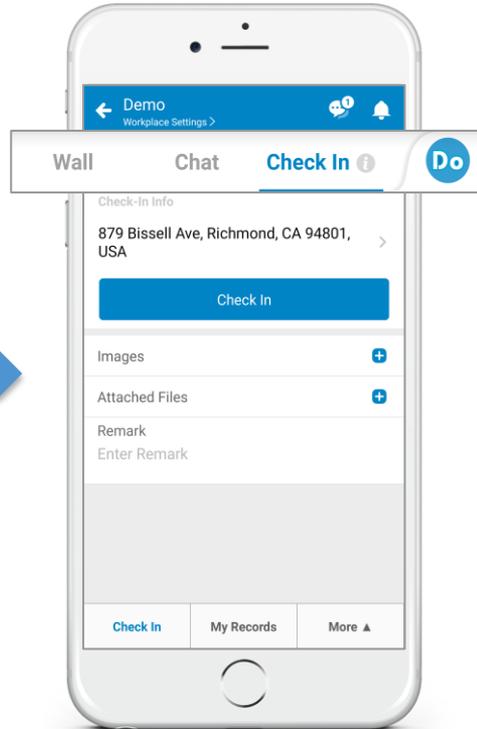
01c Workplace > Groups, Buddies > Do

2.4 Everything Begins with Do

Only displays
activated tools



02 Tool select

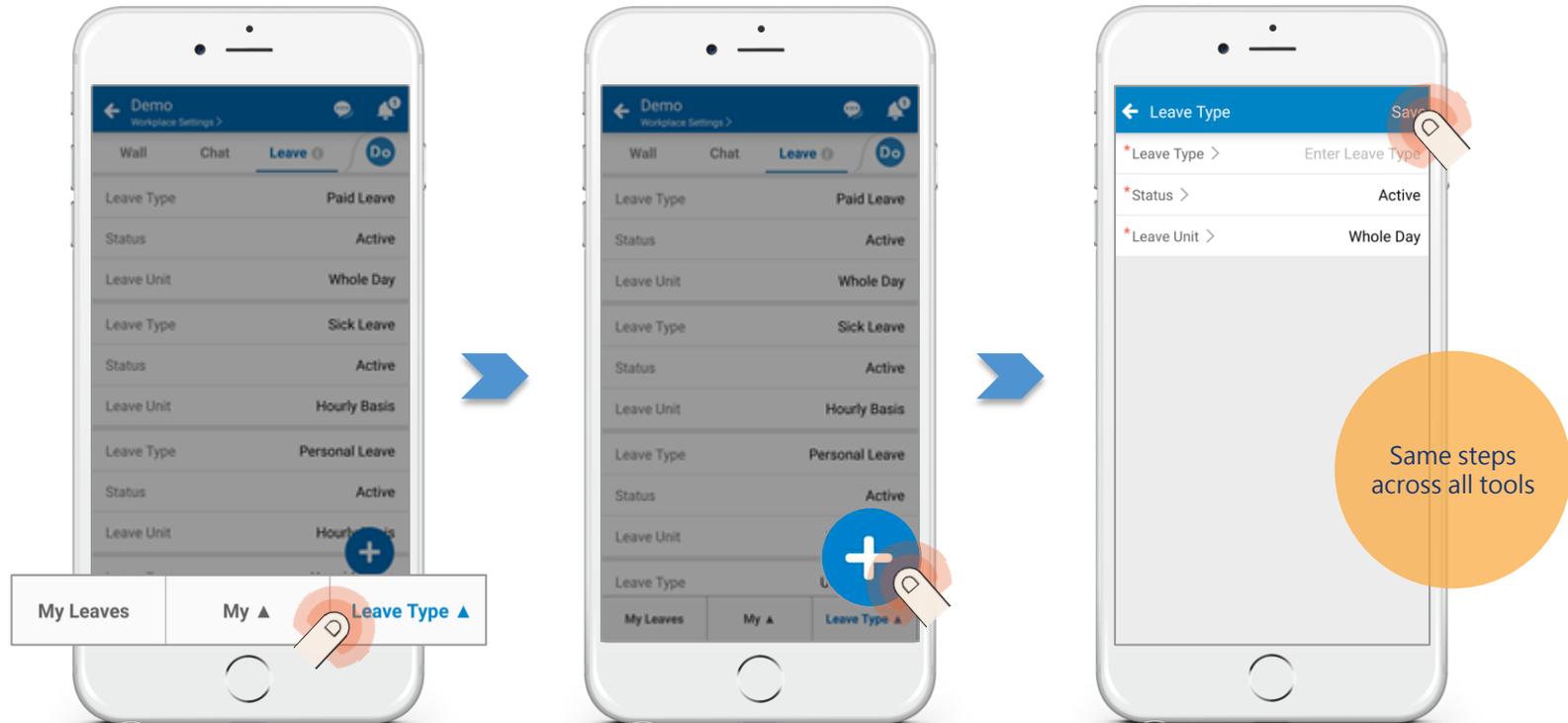


03 Tool tab is displayed at the top

2.5 Tool Data Input

Select the desired tool and function
Use + to create, it is that simple!

2.5 Tool Data Input : e.g. Leave Type



01 Function Select

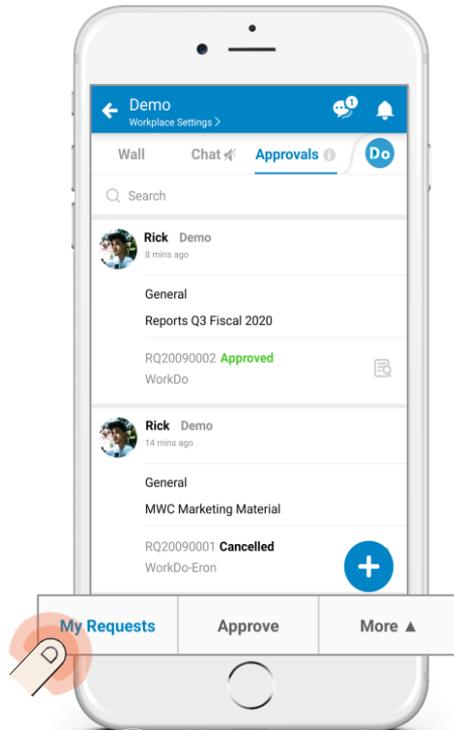
02 Click +

03 Data input > Save

2.6 View Records

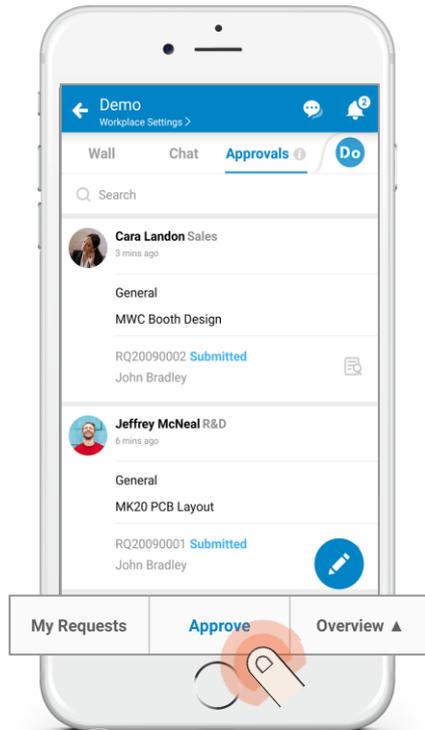
Same simple record viewing steps across all tools!

2.6 View Records : e.g. Approvals



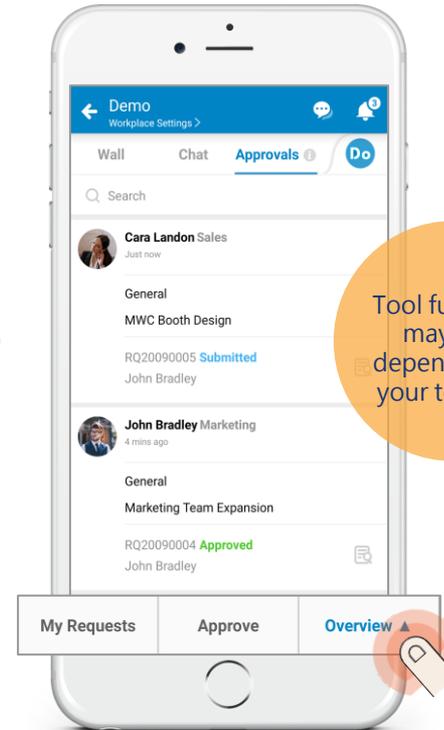
01a My Requests

Or



01b Approval

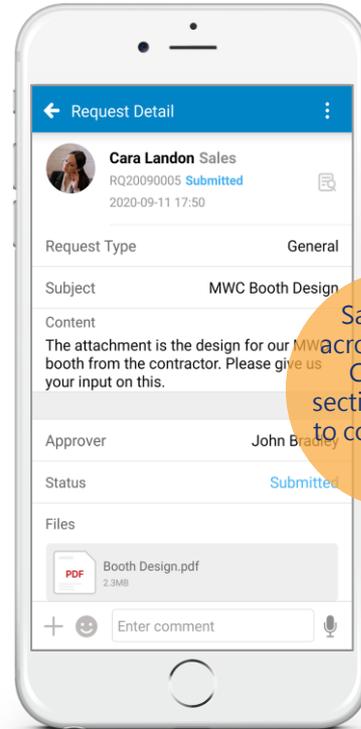
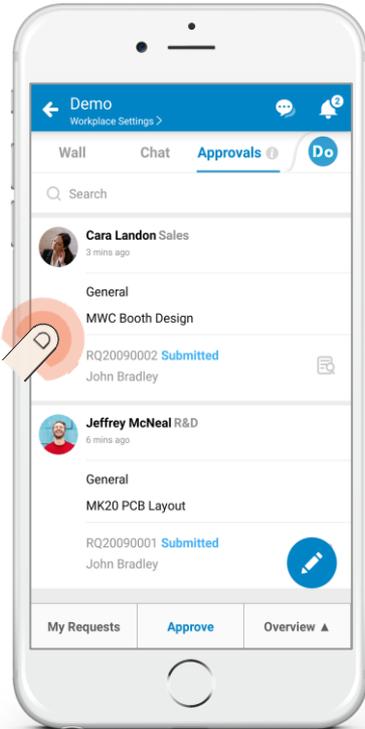
Or



01c Processed

Tool functions may vary depending on your tool role

2.6 View Records : e.g. Approvals



Same steps across all tools. Comment section available to communicate details.

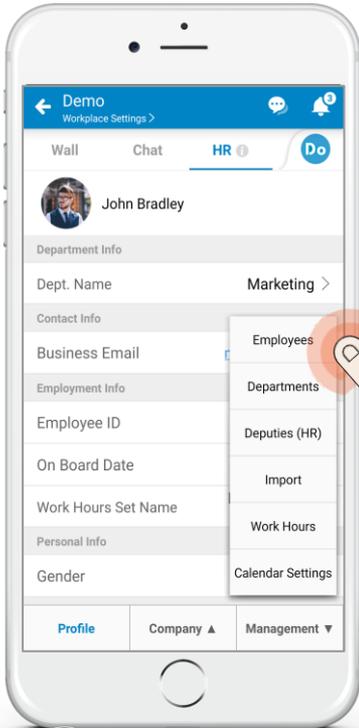
02 Select a record

03 View record detail

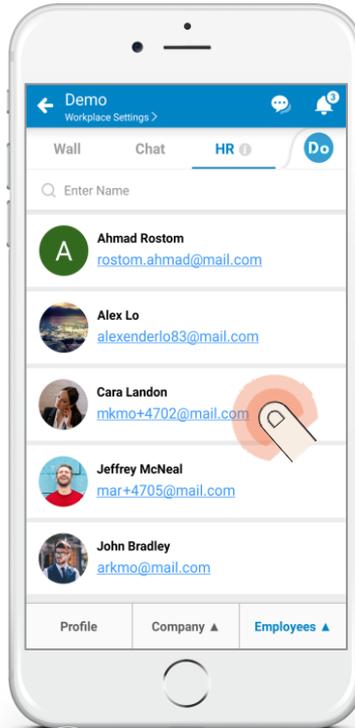
2.7 Edit

Made a mistake? Worry not!

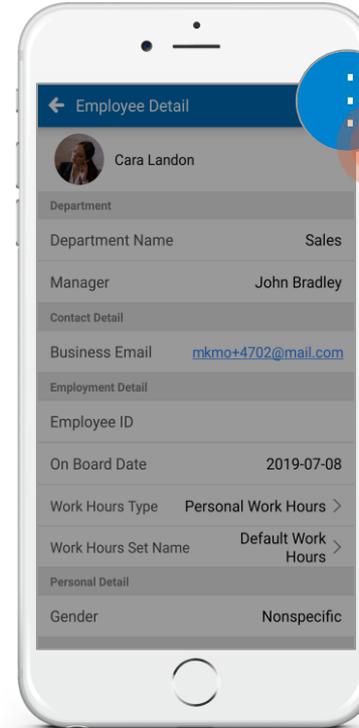
2.7 Edit : e.g. HR



01 Management > Employees

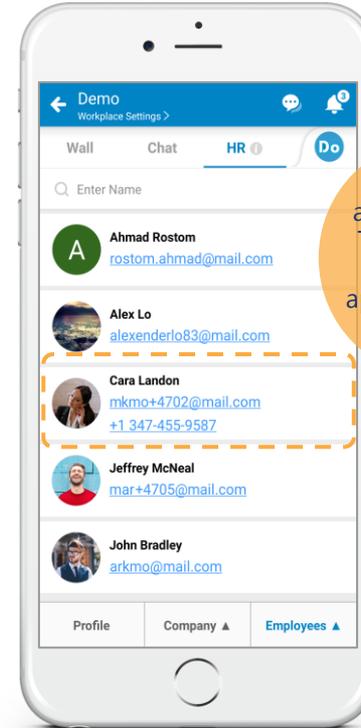
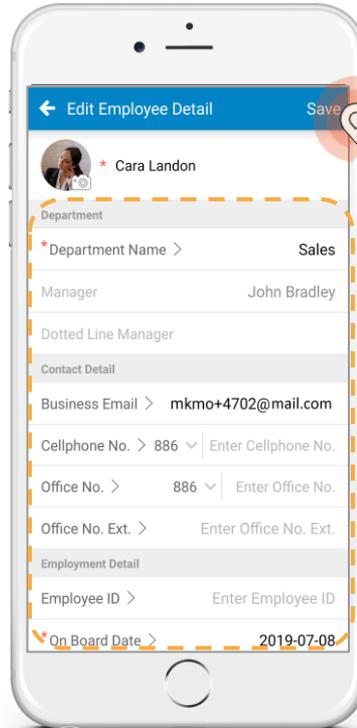
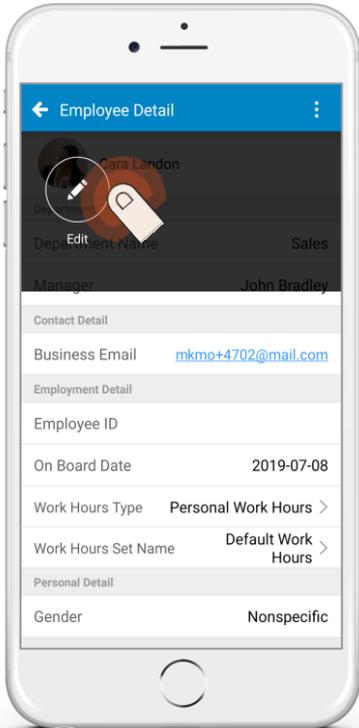


02 Select an employee



03 Function button

2.7 Edit : e.g. HR



Same steps across all tools. Those that are depending approval cannot be edited.

04 Edit

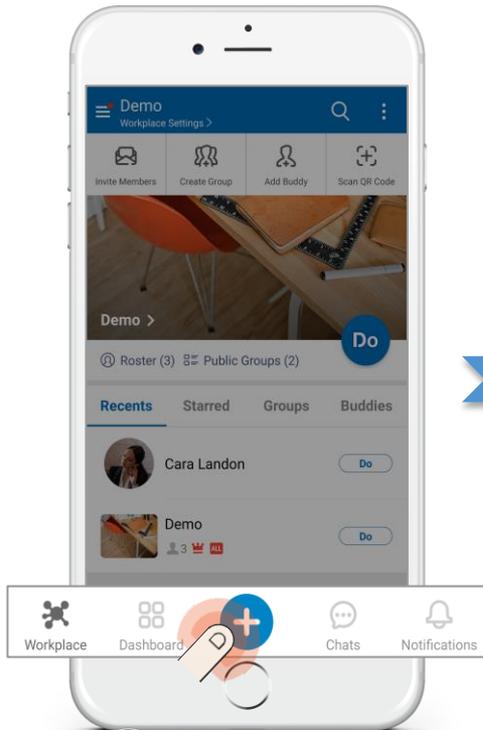
05 Info edit > Save

06 Info edited

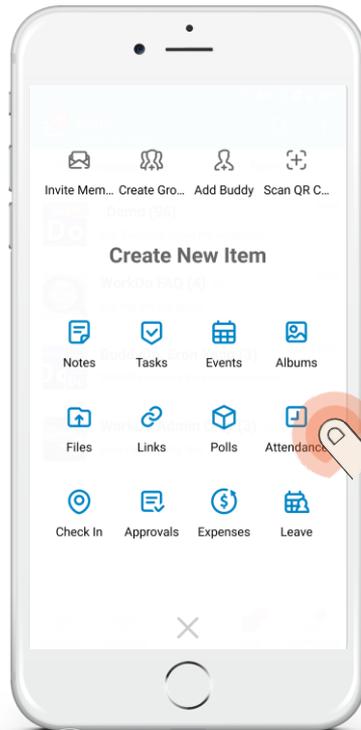
2.8 Frequently Used Tools

Quickly access tools you frequently use with one button!

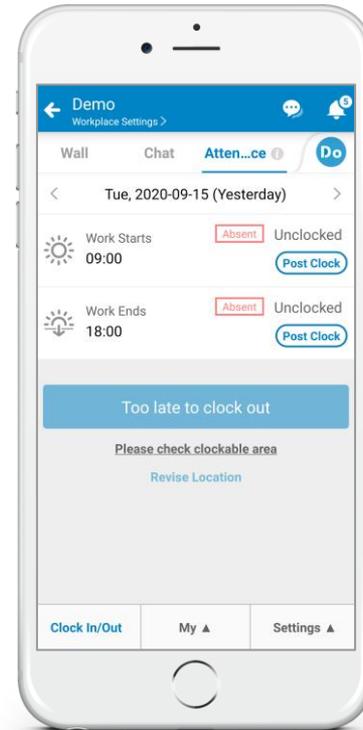
2.8 Quicker Tool Access with +



01 + Create



02 Select a tool from your frequently used tool list

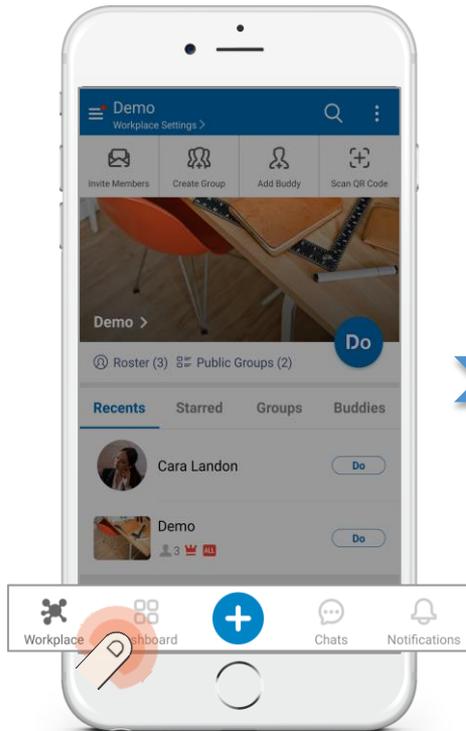


03 Quick tool access

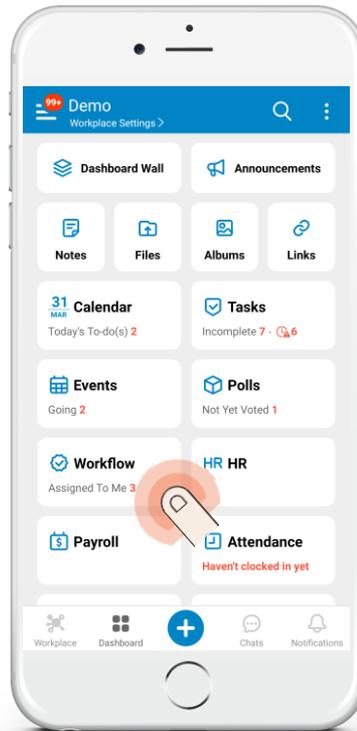
2.9 Streamlined Workflow

Attendance, Overtime, Leave, Expenses, Approvals
Make use of Workflow in the dashboard
and save yourself valuable time!

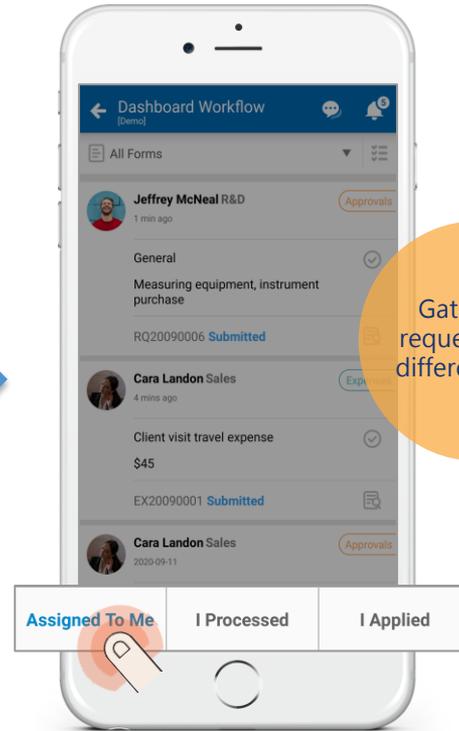
2.9 Streamlined Workflow



01 Dashboard



02 Workflow

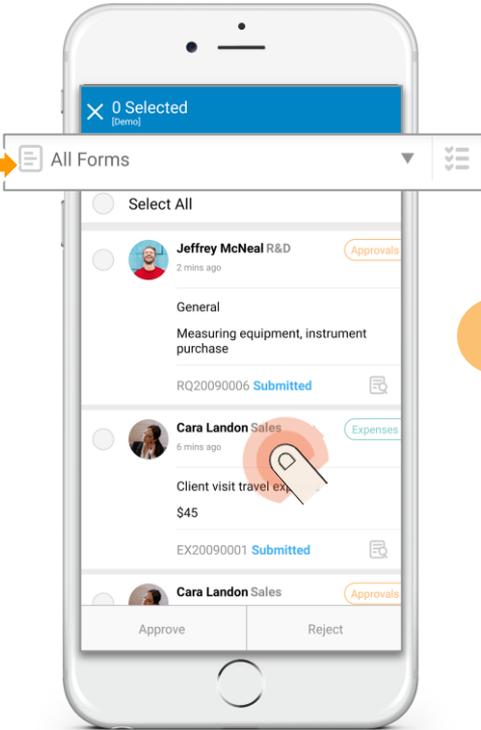


03 Assigned to Me

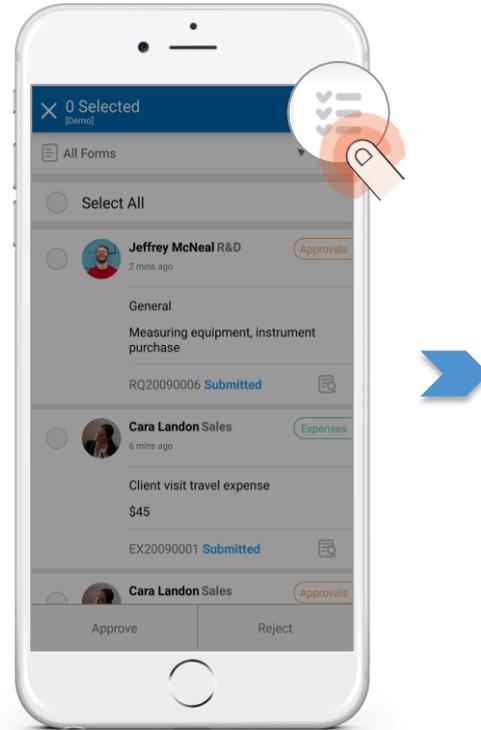
Gathers all requests from different tools.

2.9 Streamlined Workflow

Filter the types of requests



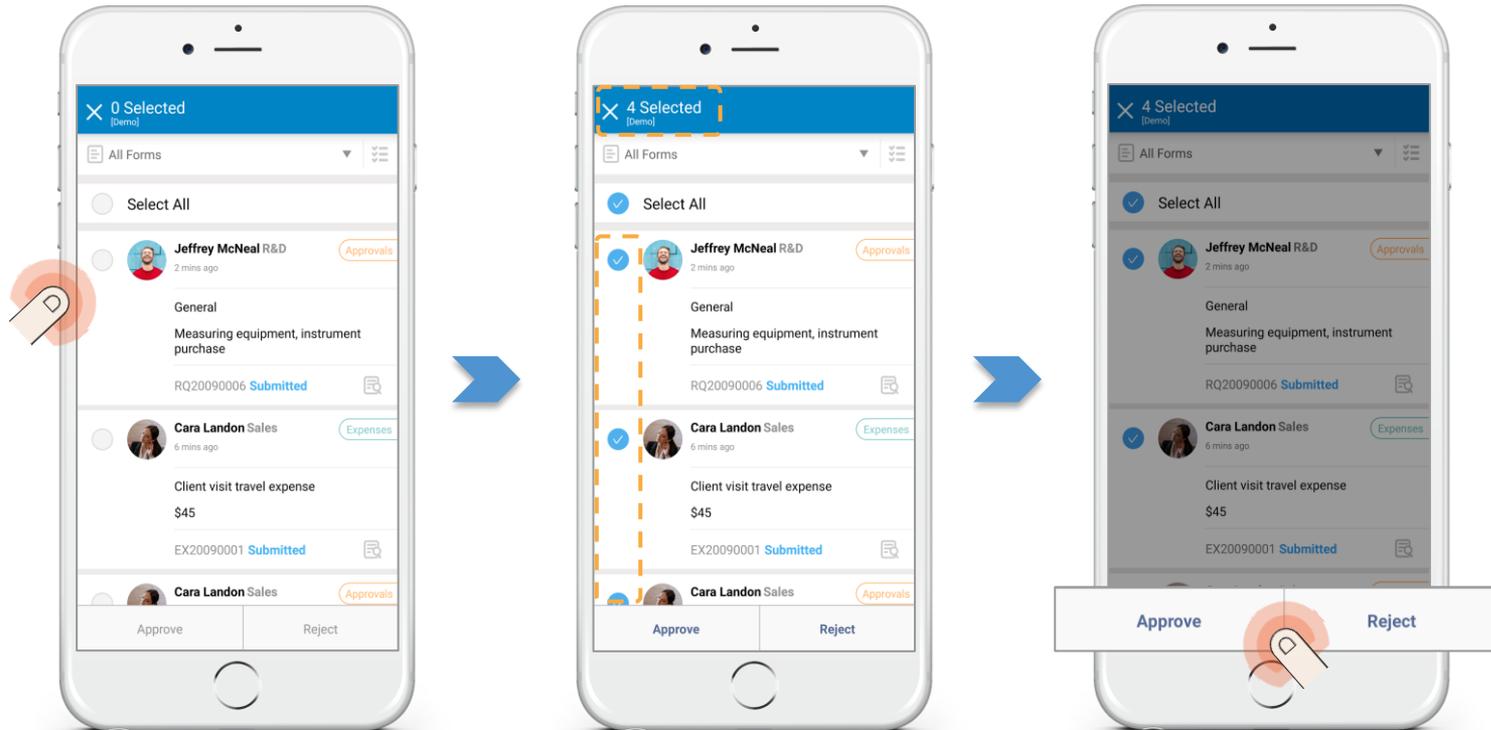
Or



04a Single request sign off

04b Batch process

2.9 Streamlined Workflow : Batch Process

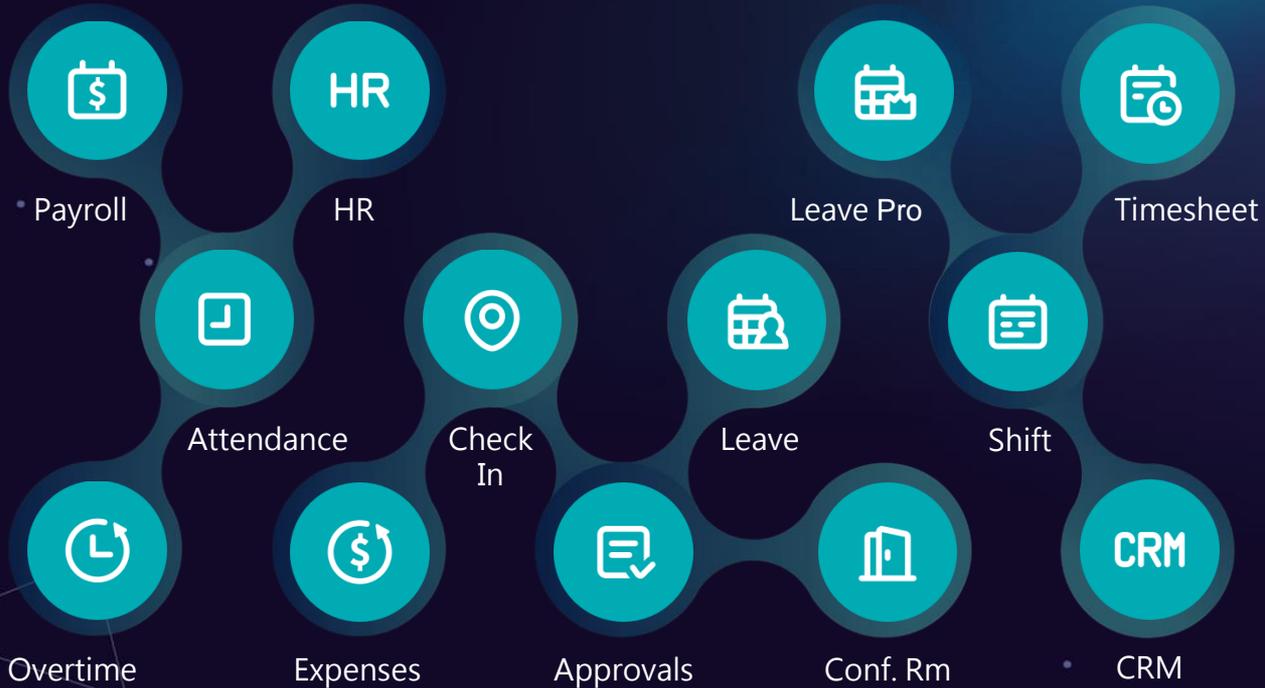


05 Select requests

06 Marked by blue checks

07 Approve or reject

3 Advanced Tools



3.1 HR

The impost integral part of all the tools!



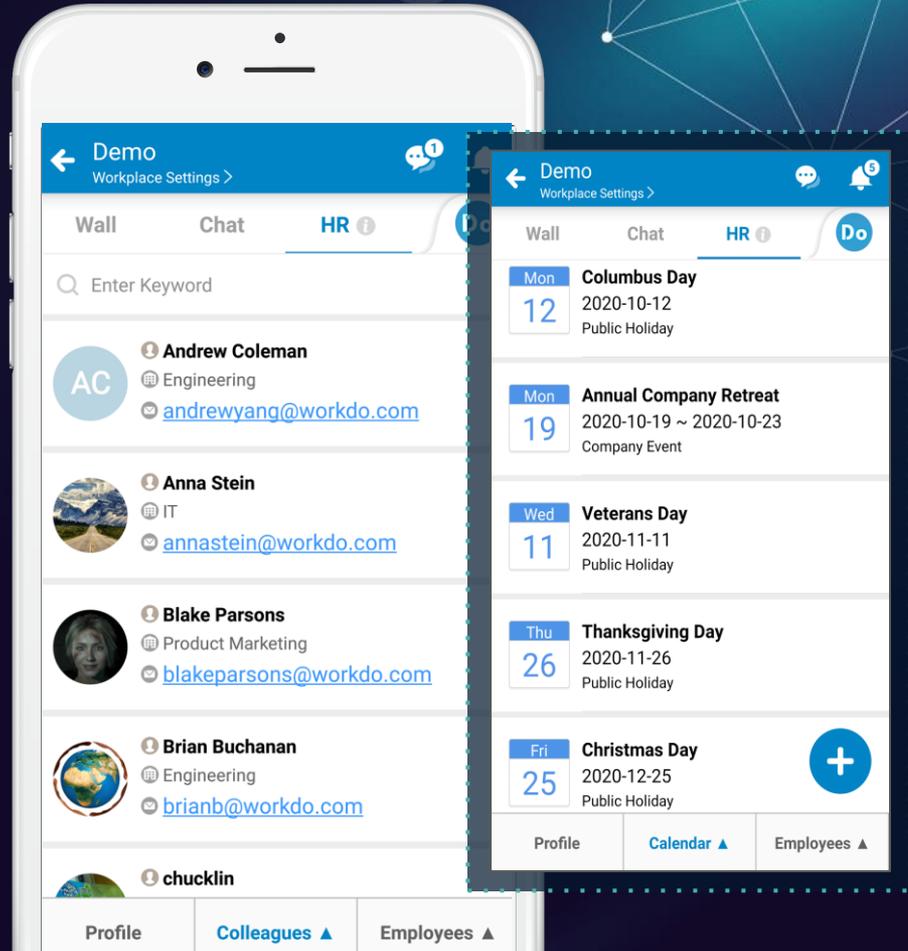
Download
User Guide

[Back to Tool List](#)

HR

Set organizational structure & hierarchy
Easily manage your team!

- Linked to Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses & Approvals.
- Set your organizational structure and internal directory.
- Maintains the employee profiles.
- Set work hours and clock-in/out times.
- Create your company calendar.
- Set deputies, approvers and dotted-line managers.

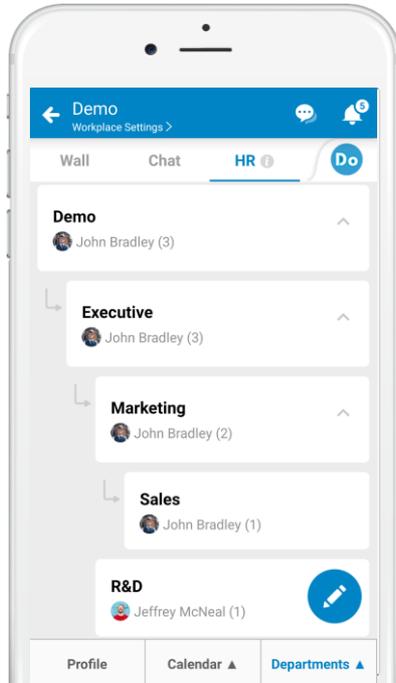


3.1 HR : The Pillar of WorkDo

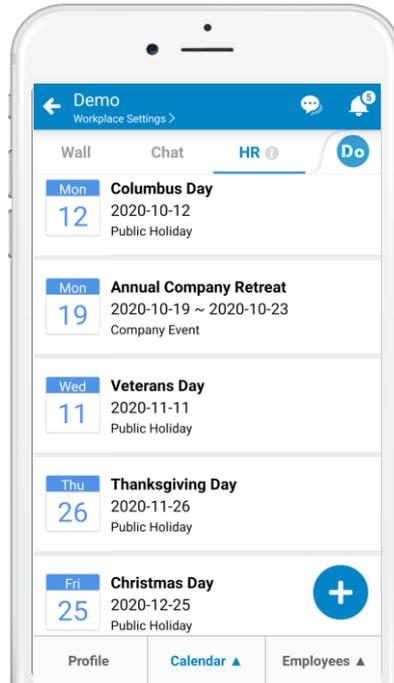
Function	Payroll	Attendance	Check In	Leave	Leave Pro	Shift	Overtime	Timesheet	Expenses	Approvals
System Settings		●		●	●	●	●		●	●
Work Hours		●			●	●	●			
Departments		●	●	●	●	●	●		●	●
Employment Types					●		●			
HR Calendar		●			●		●			
Employee Profiles	●	●	●	●	●	●	●	●	●	●
Deputy Assignment				●	●					
Approver Assignment									●	●
Shift Manager Assignment		●				●				
Projects								●		

3.1 Features (Available functions are dependent on member tool role)

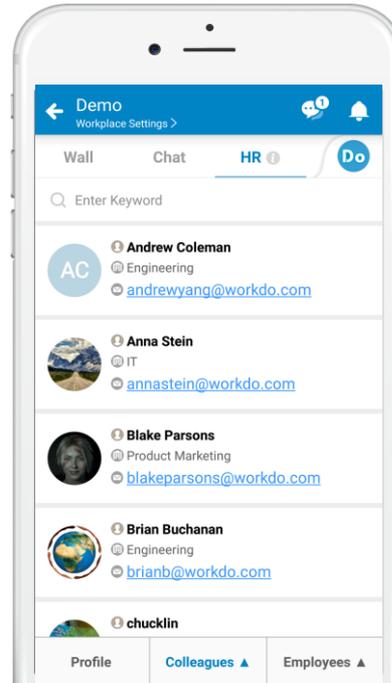
Department Management



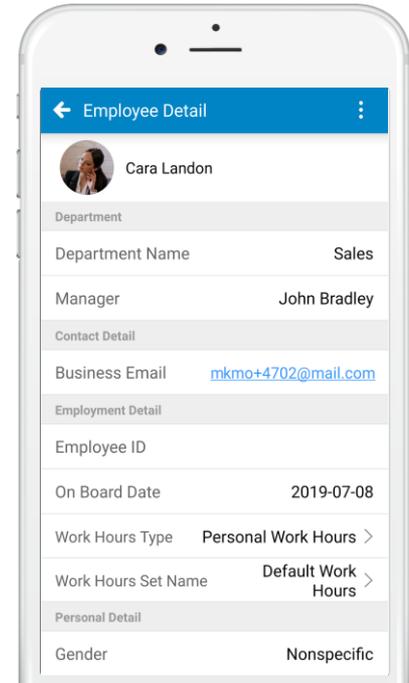
Company Calendar



Internal Directory



Profile Update



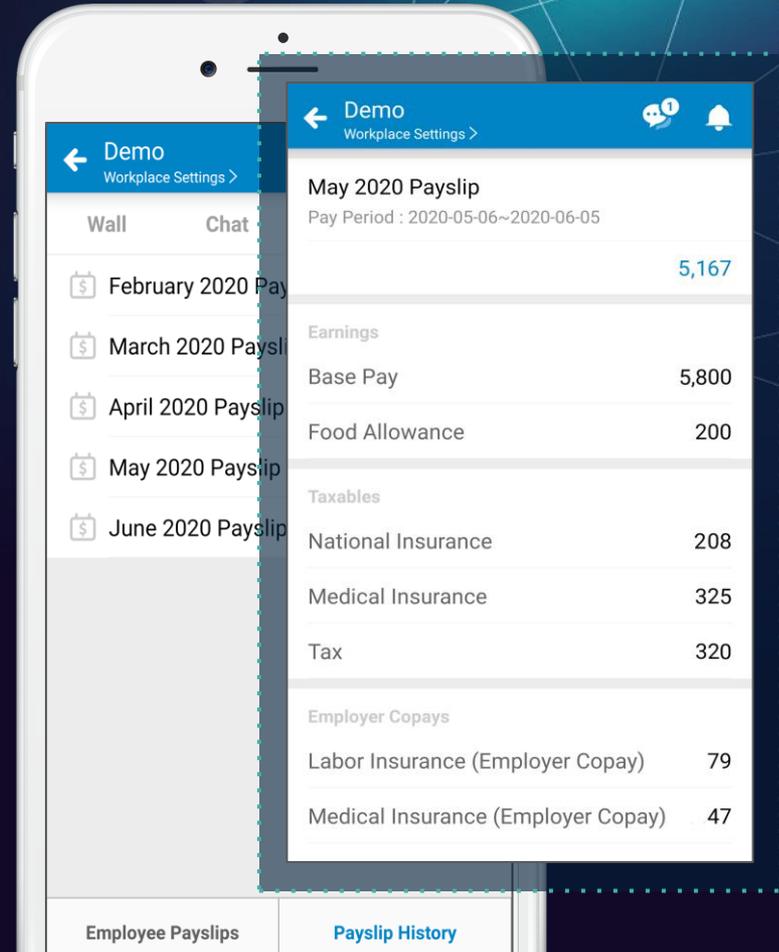
3.2 Payroll

Customizable to fit all businesses!
Minimize effort spent on payroll management.
Send payslips with a click of a button.

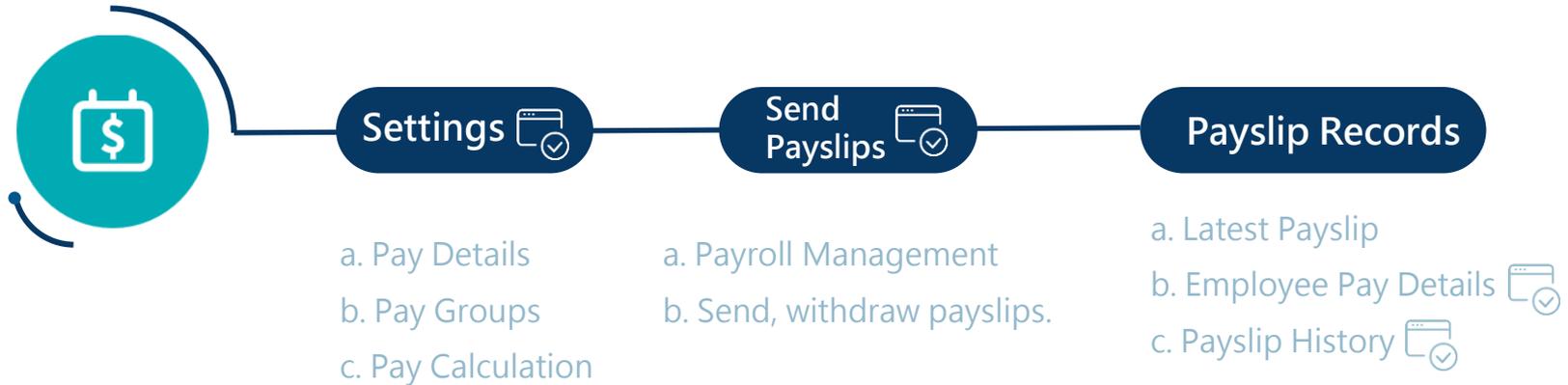
Payroll

A payroll management system that satisfies all businesses!

- Customize equations for salary calculations.
- Create reference tables that abide by local labor laws.
- Expand and customize fields as required.
- Set pay groups, items and details for calculations.
- Linked with Leave Pro and Overtime for compensation pay.
- Automated salary calculations based on set equations.
- Use past salary equations when no changes are needed.
- Send employee payslips with a click of a button.



3.2 Payroll : Functions & Procedures



Web version only

3.2 Features (Available functions are dependent on member tool role)

Settings - Web

 Payroll [HR Staff](#)

Payslip

- Latest Payslip
- Payslip History

Payroll Management

- Pay Calculation
- Pay Details
- EMPL Pay Details
- Pay Groups
- Expand EMPL Pay Details
- Reference Tables
- Leave Requests
- Overtime Requests

Payslip History

Demo Workplace Settings >

Wall Chat **Payroll** Do

- February 2020 Payslip >
- March 2020 Payslip >
- April 2020 Payslip >
- May 2020 Payslip >
- June 2020 Payslip >

Employee Payslips Payslip History

Password

Demo Workplace Settings >

Wall Chat **Payroll** Do

Password

For privacy reasons, please enter your login password before viewing your payslip.

Confirm

Employee Payslips Payslip History

Payslip Details

Demo Workplace Settings >

May 2020 Payslip
Pay Period : 2020-05-06~2020-06-05

5,167

Earnings

Base Pay	5,800
Food Allowance	200

Taxables

National Insurance	208
Medical Insurance	325
Tax	320

Employer Copays

Labor Insurance (Employer Copay)	79
Medical Insurance (Employer Copay)	47

3.3 Attendance

Wi-Fi, GPS clock-in/out using PC or smartphone.



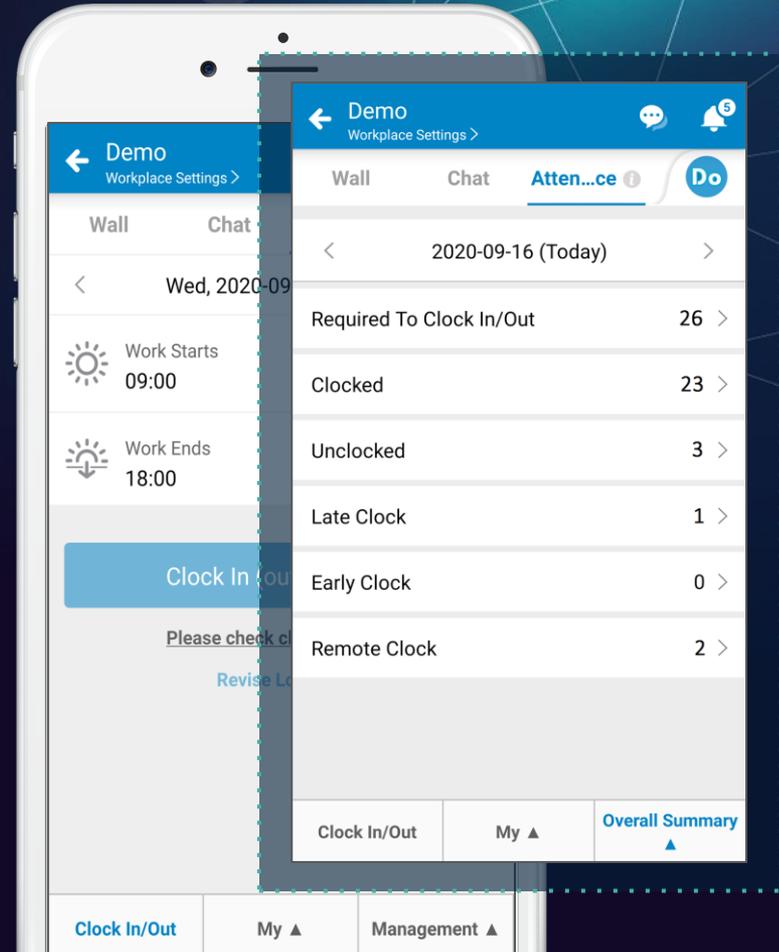
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User Guide

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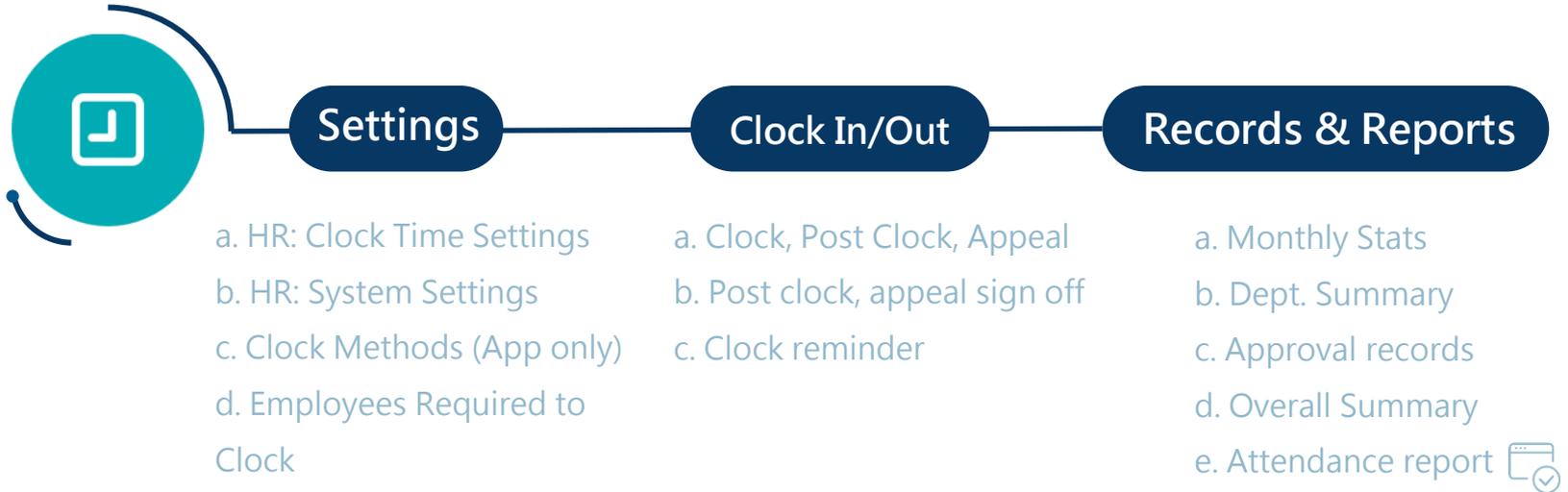
Attendance

Clock in/out with PC or smartphone and make time clock a thing of the past!

- Clock in/out via PC, smartphone or tablet.
- Linked to HR and Shifts tools.
- Works for employees with flexible work hours, shifts, etc.
- Post clock or appeal when needed.
- HR Staff or Department Managers sign off on post clocks.
- Daily, monthly report available.
- Set clock in/out reminder.
- Export and view attendance report.



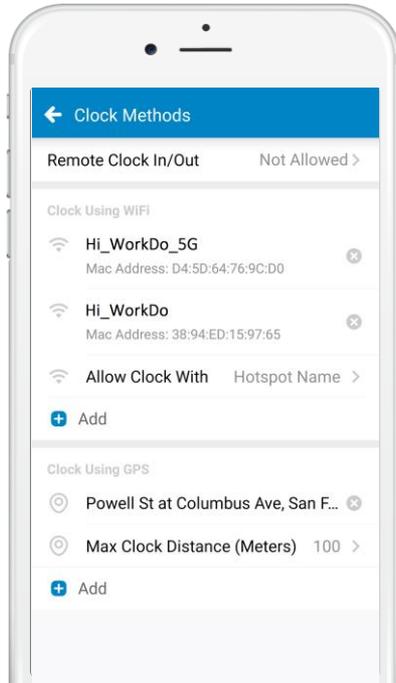
3.3 Attendance : Functions & Procedures



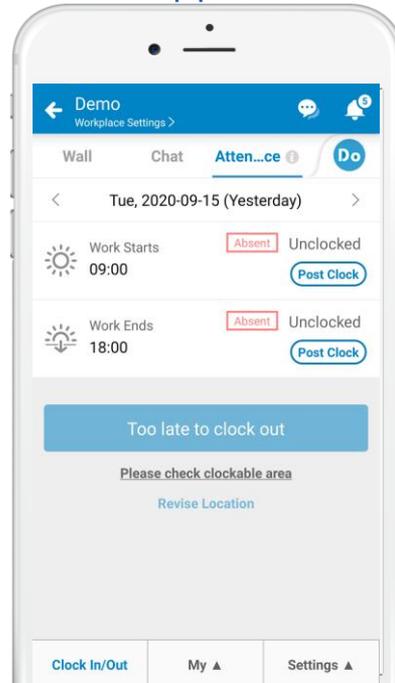
Web version only

3.3 Features (Available functions are dependent on member tool role)

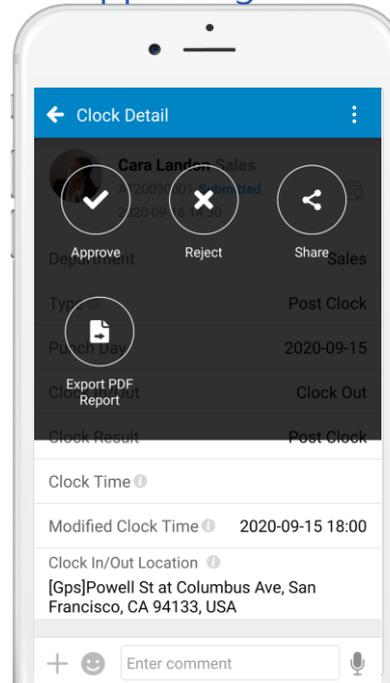
Settings



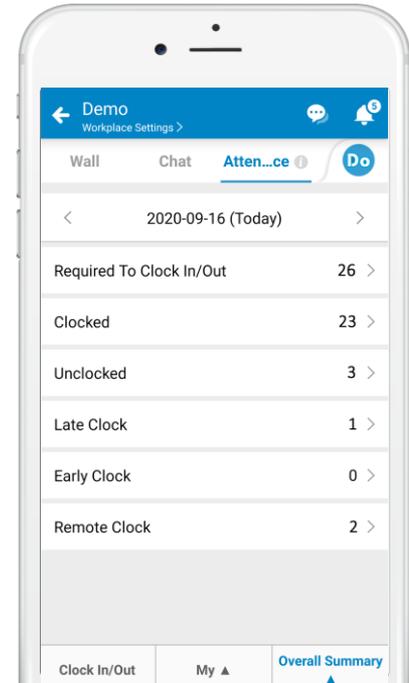
Clock, Post Clock, Appeal



Post clock, appeal sign off



Stats



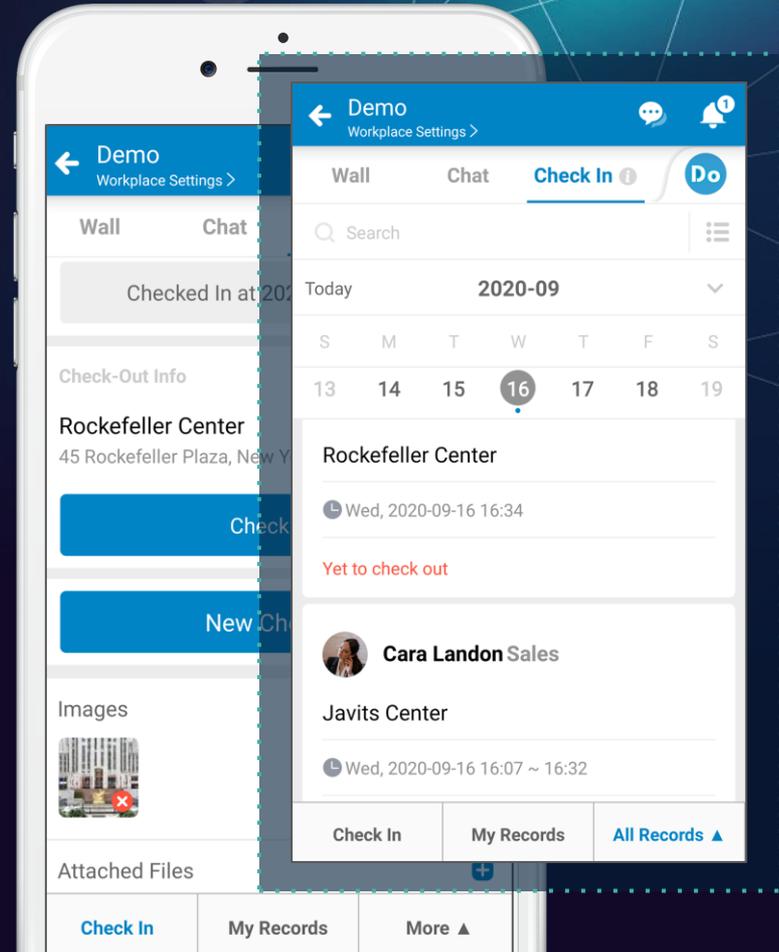
3.4 Check In

• Location check in for the field staff.
Perfect for the remote staff to record their progress.

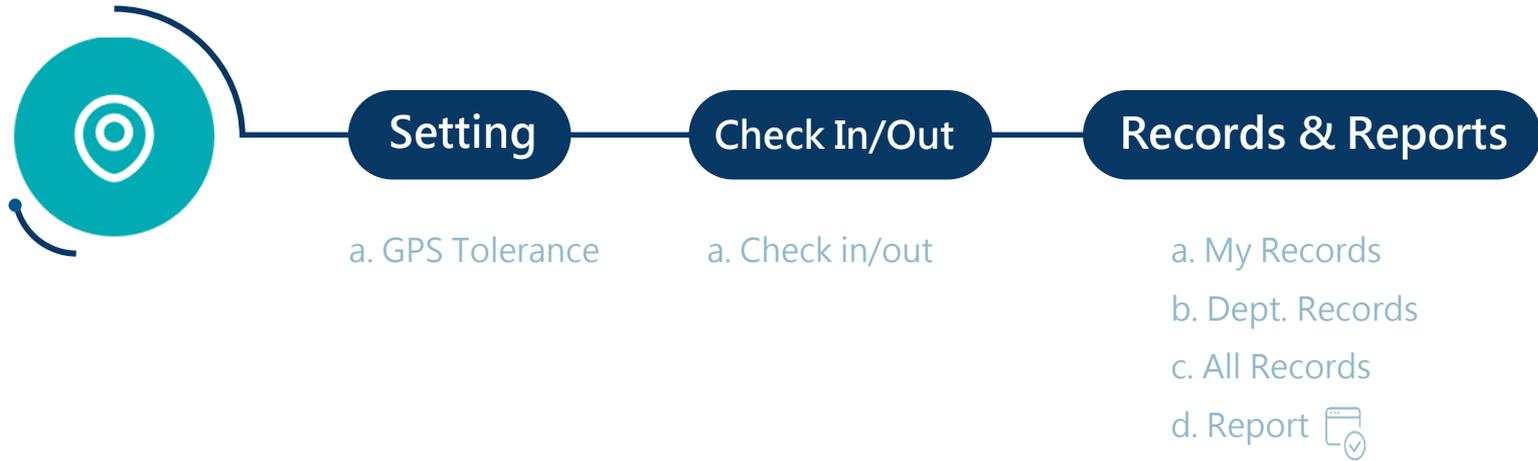
Check In

A location check in tool designed for field staff management.

- Location check in/out, anytime, anywhere!
- Supports photo and file upload.
- Records the length of time at check in/out locations.
- Set the GPS distance tolerance.
- Check in/out records available.
- List view and calendar view available.
- Report export.



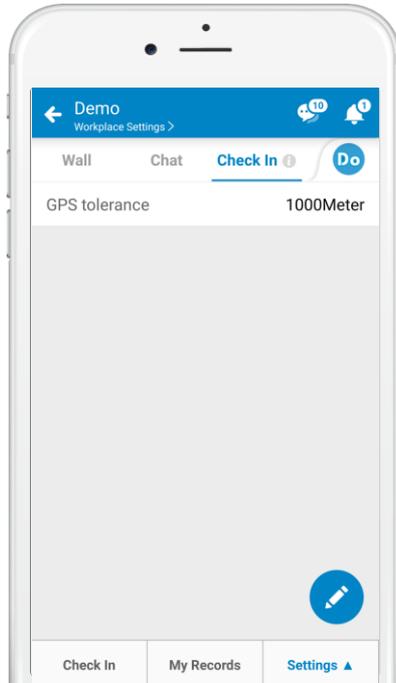
3.4 Check-In : Functions & Procedures



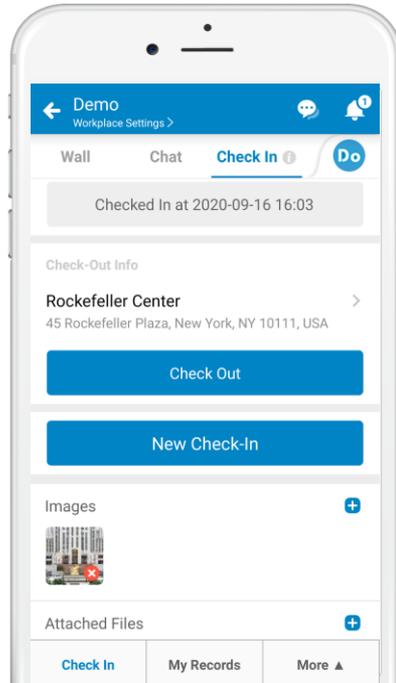
Web version only

3.4 Features (Available functions are dependent on member tool role)

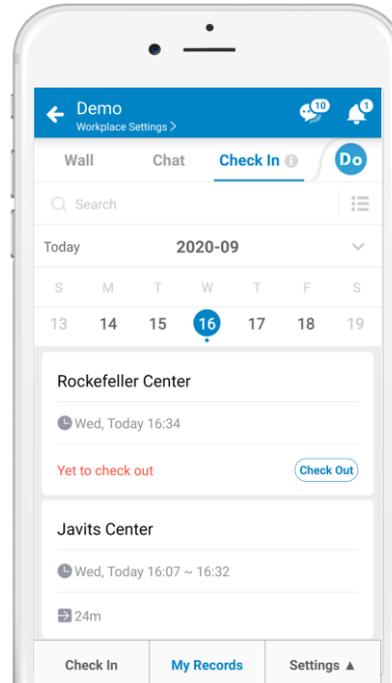
GPS Tolerance



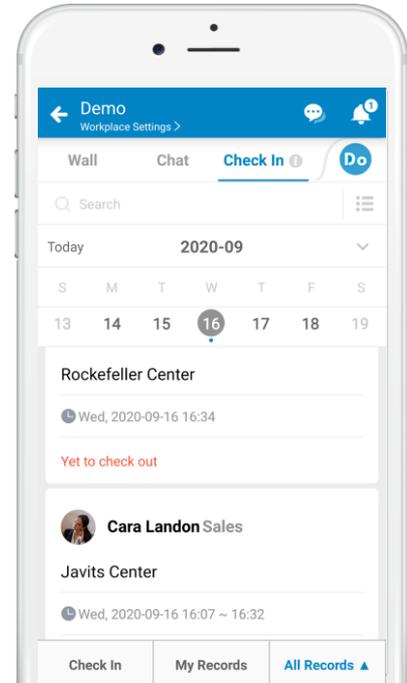
Check In/Out



My Records



All Records



3.5 Leave

Real-time online leave application and approval.
An overview displays employees that are on leave.



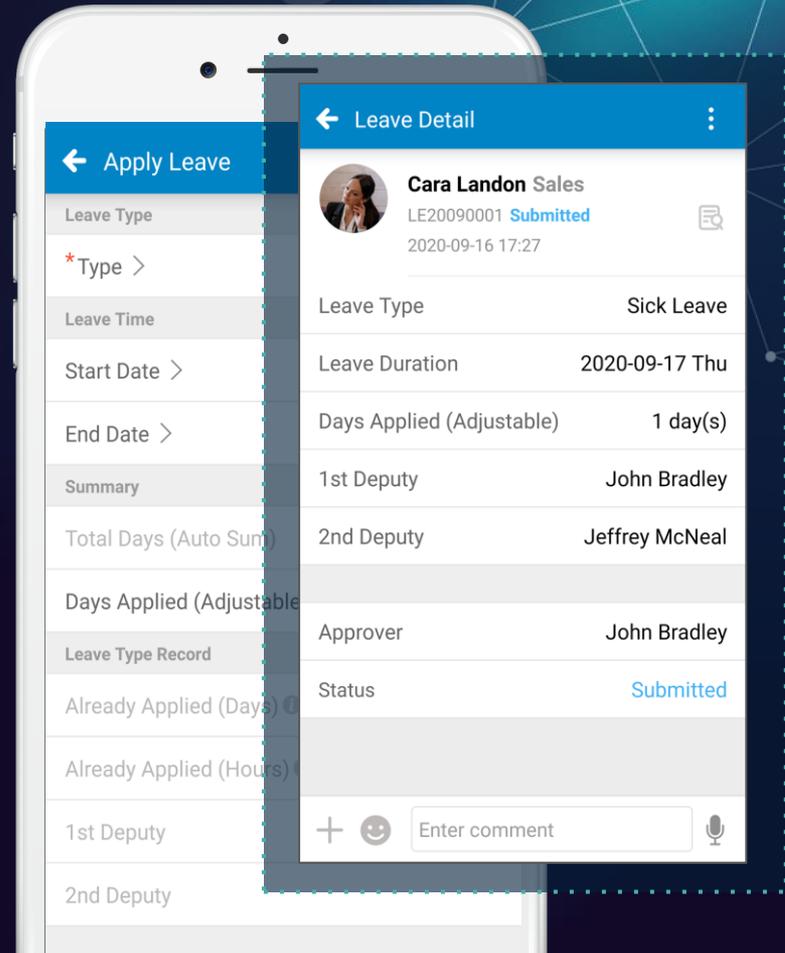
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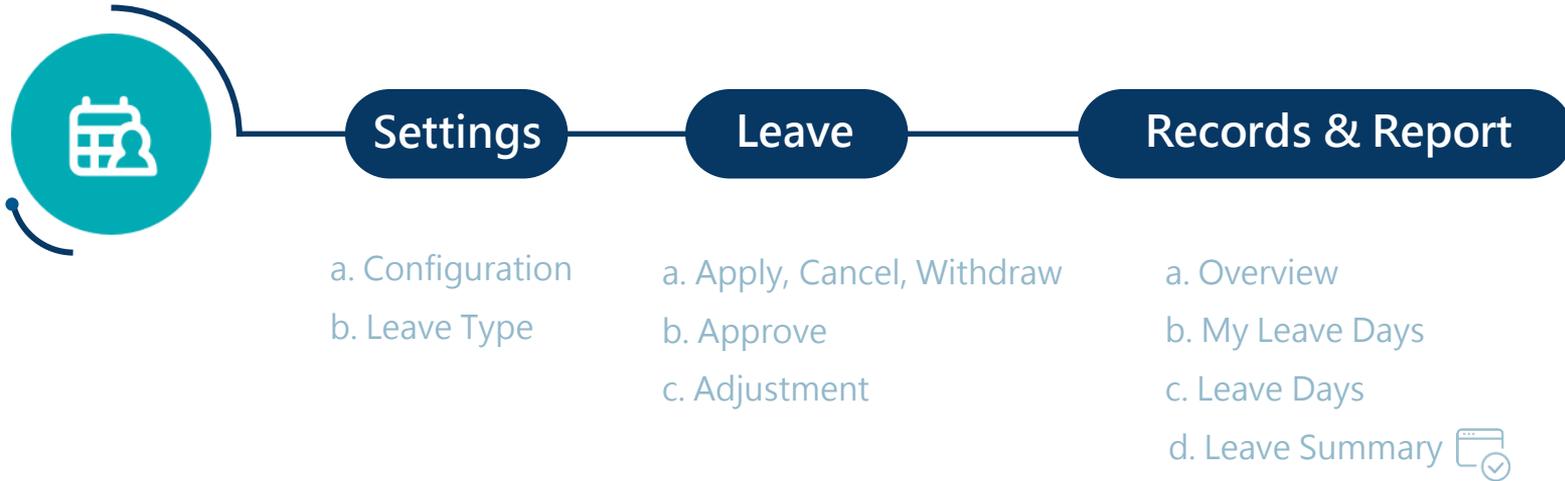
Leave

A leave management tool that produces leave reports for easy resource management!

- Perfect for teams that need to record employee leaves.
- Department Managers sign off on leaves.
- Supports multi-level approval process if needed.
- Set and customize different types of leaves.
- Comment section available for communication.
- Leave Overview displays employees on leave.
- Export and view leave report.



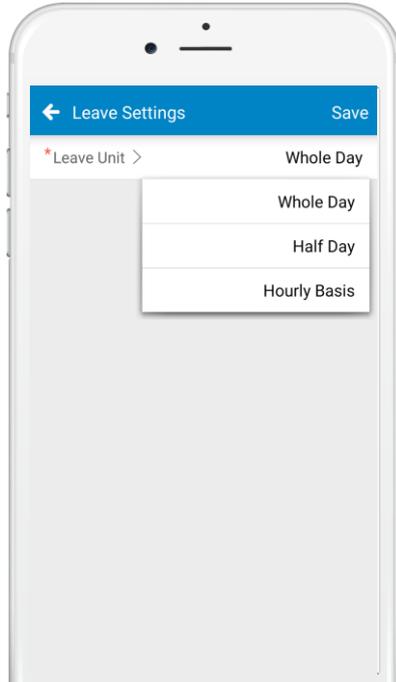
3.5 Leave : Functions & Procedures



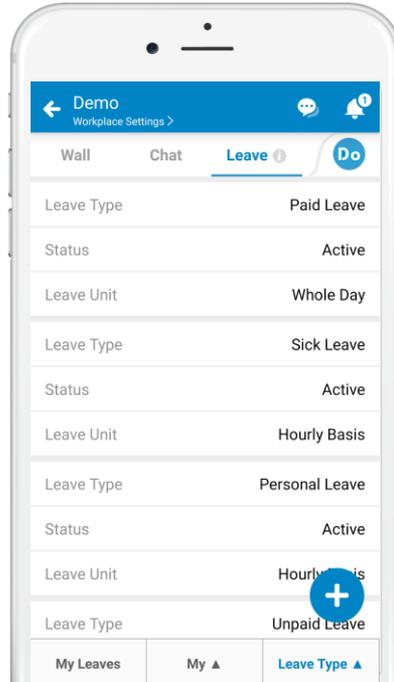
Web version only

3.5 Features (Available functions are dependent on member tool role)

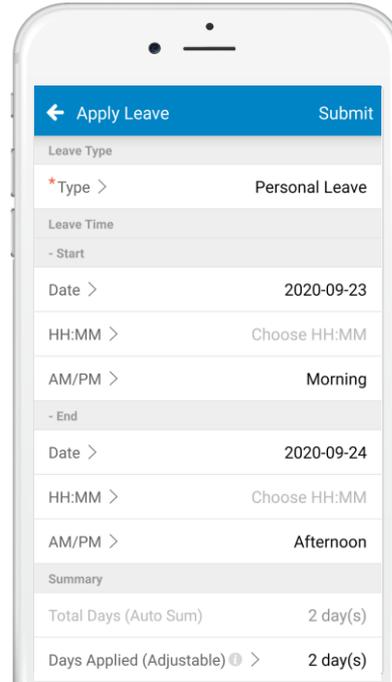
Set leave base units



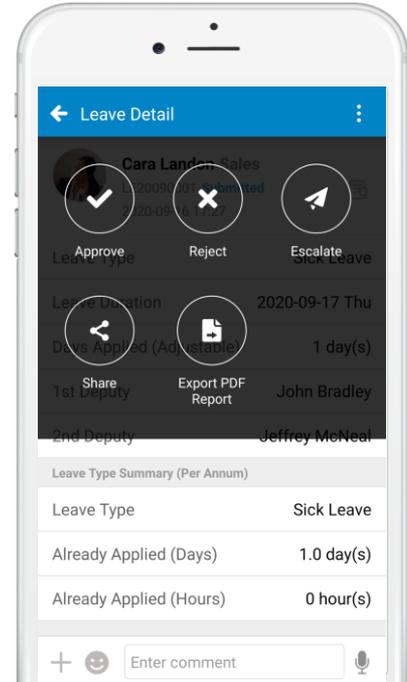
Set leave type



Apply

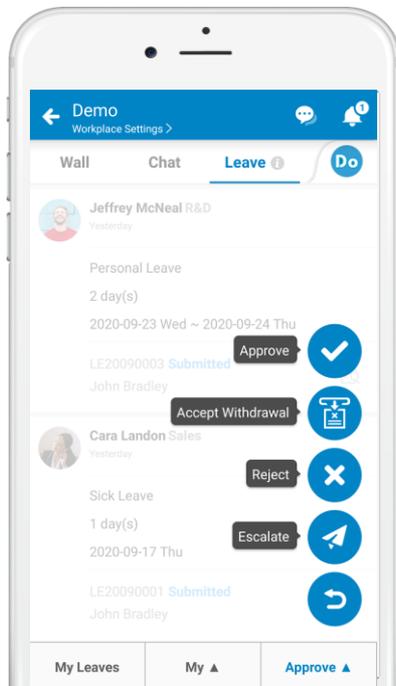


Approve

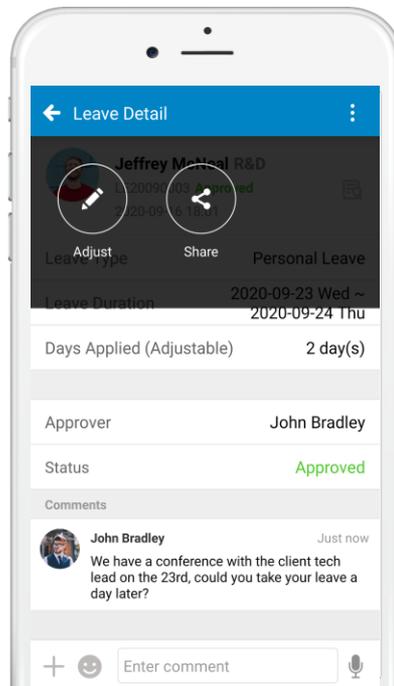


3.5 Features (Available functions are dependent on member tool role)

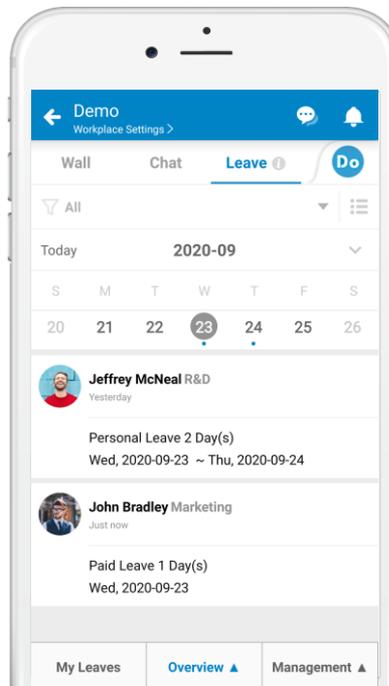
Batch approve



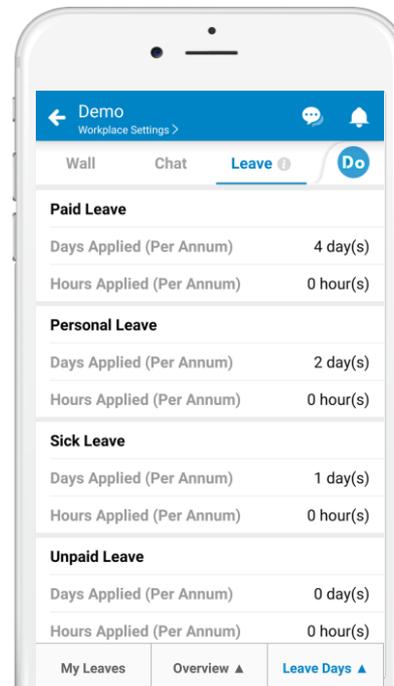
Adjust leave time



Leave Overview



Available leaves



3.6 Leave Pro

An improved automated leave system that automatically takes care of employee leave quotas, grant dates, carry over date, etc.



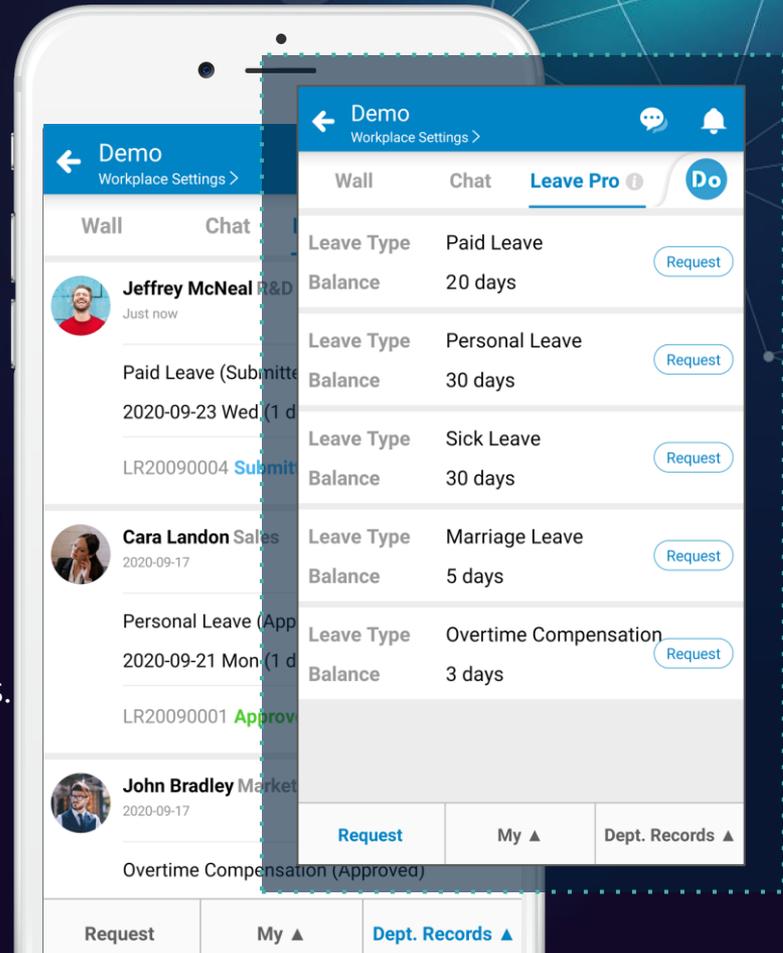
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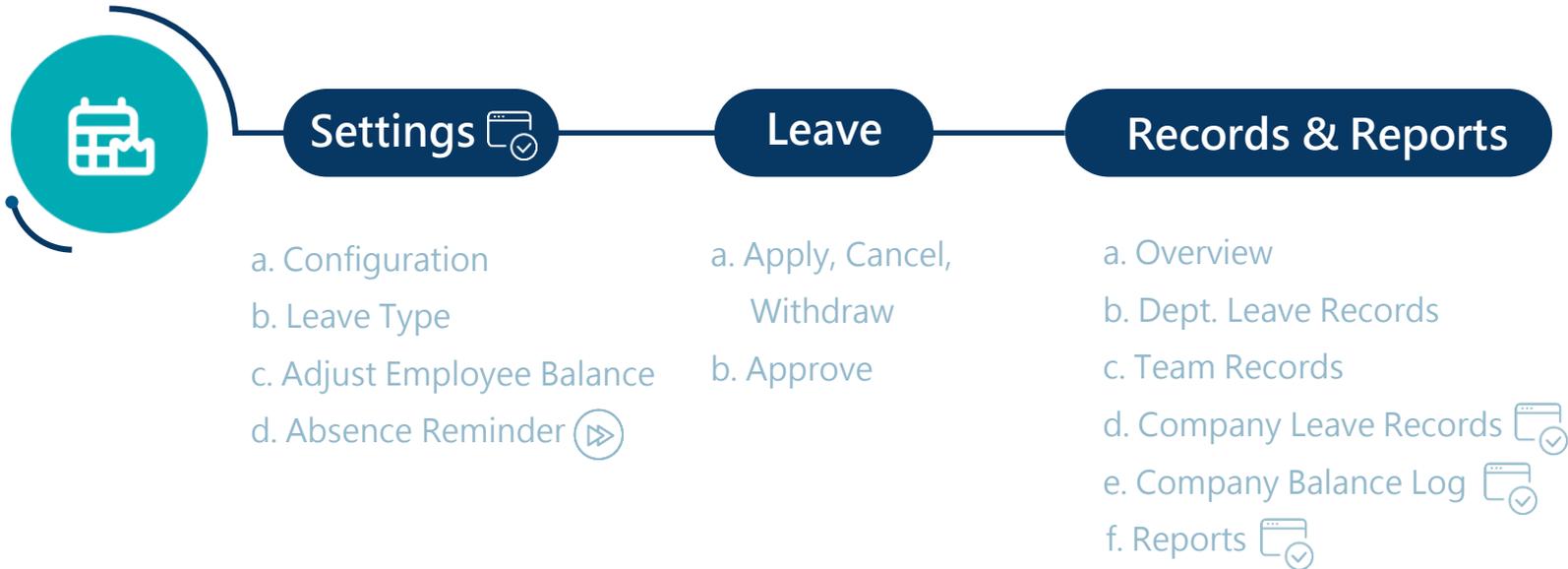
Leave Pro

An souped-up version of Leave!

- An upgraded and more powerful version of Leave.
- Linked to HR for automated leave calculation.
- Set automated leave grant rules.
- Set grant quotas, applicable employees, etc.
- Set leave carry over date and rules.
- Set leave advancement rules, advanced notice rules.
- Adjust leave days individually when needed.



3.6 Leave Pro : Functions & Procedures



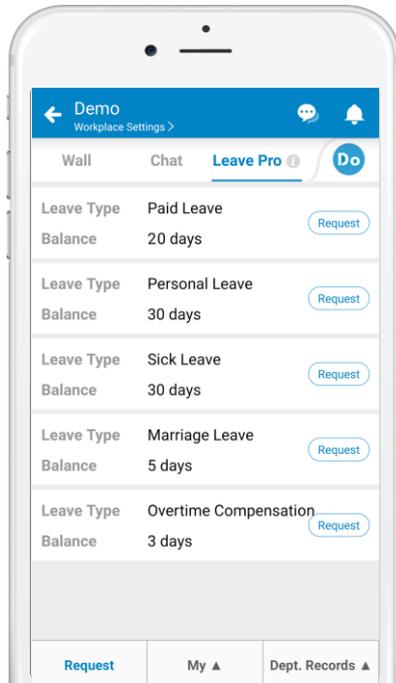
Web version only



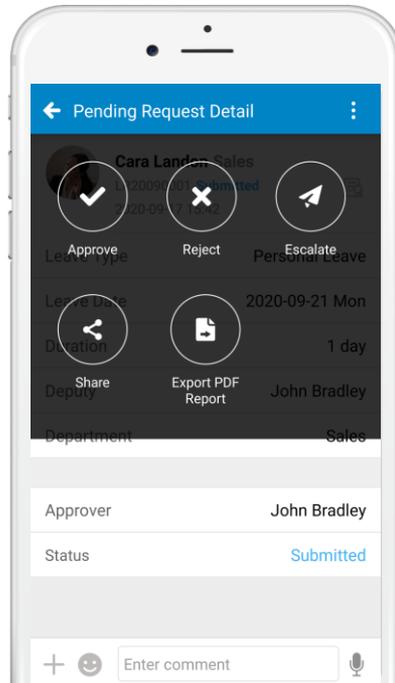
Set to default value, can be skipped for now .

3.6 Features (Available functions are dependent on member tool role)

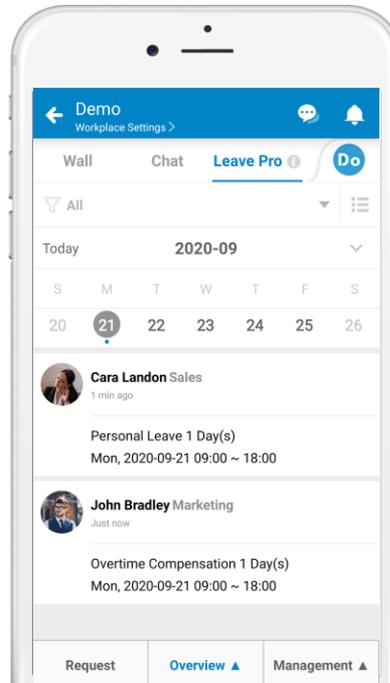
Leave balance & apply



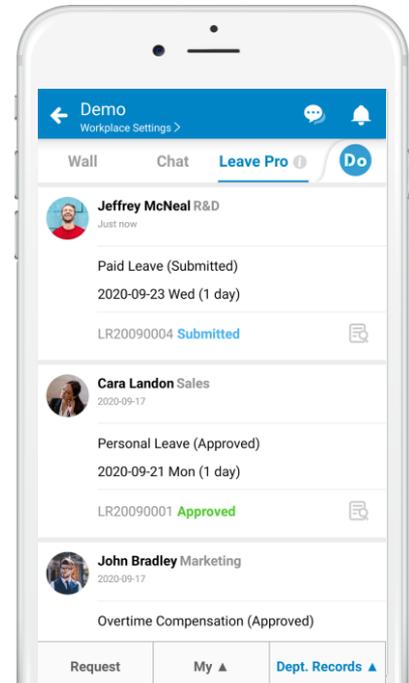
Approve



Overview



Leave records



3.7 Shift

A shift scheduling & management tool that works for shift employees!



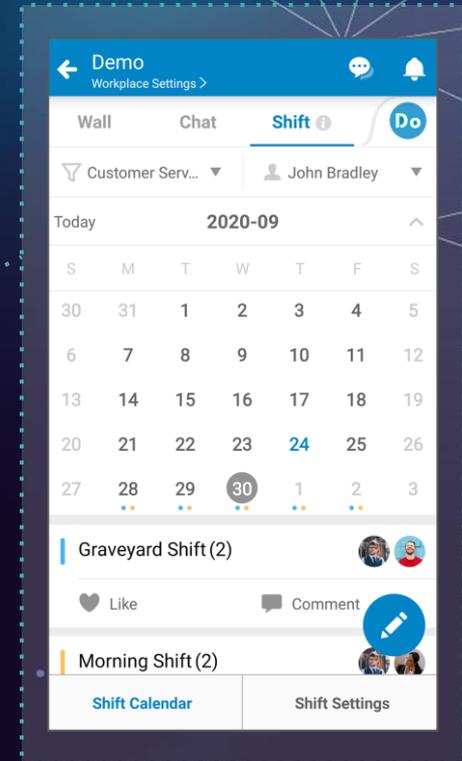
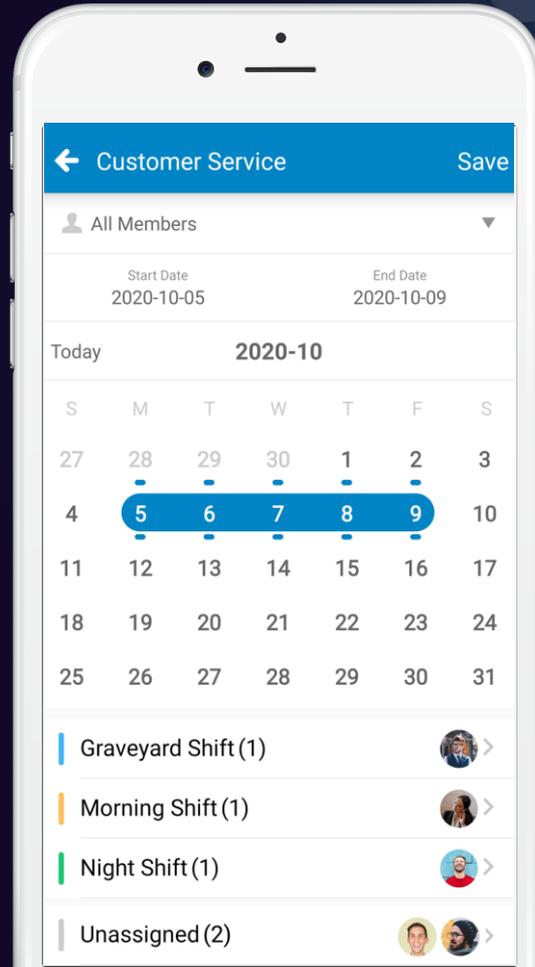
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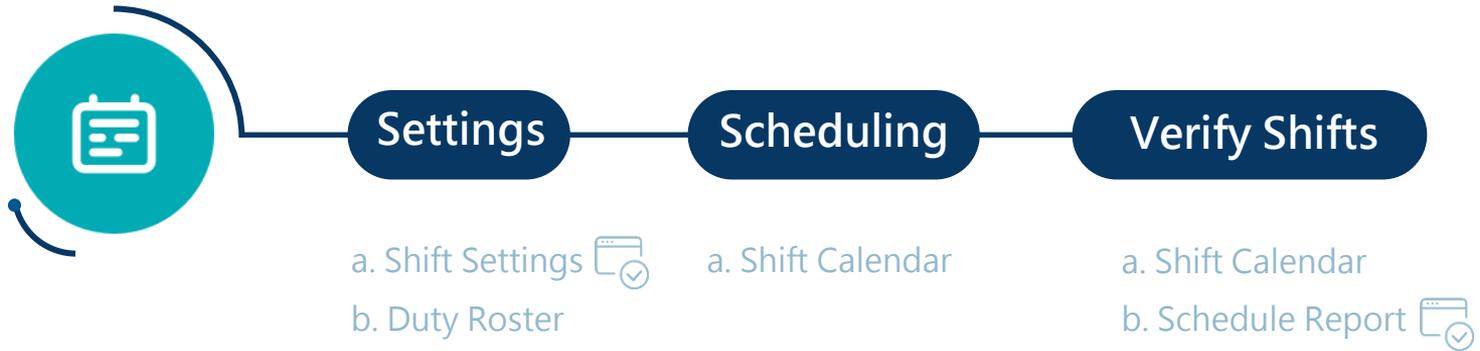
Shift

Easy to use!
Simple to manage!

- Manage multiple shift tables.
- Manage rotating shifts & employees.
- Scheduling by a date or time period.
- Send notifications to shift employees.
- A comment section available for handover details.
- View shifts of specific employees.
- Employees can quickly verify their schedules.



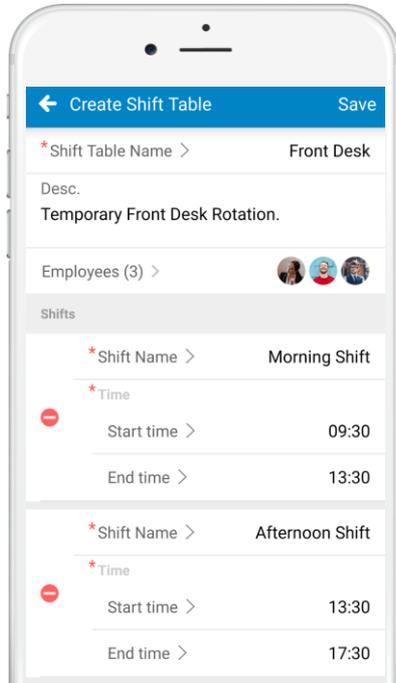
3.7 Shift : Functions & Procedures



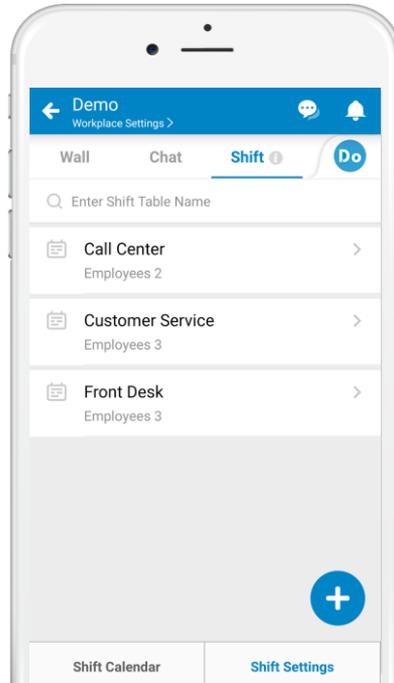
Web version only

3.7 Features (Available functions are dependent on member tool role)

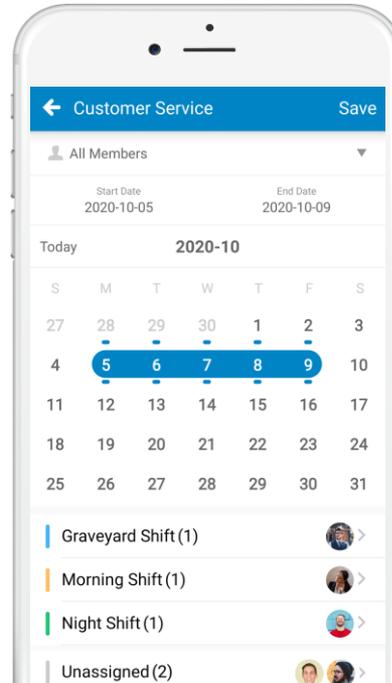
Create shifts



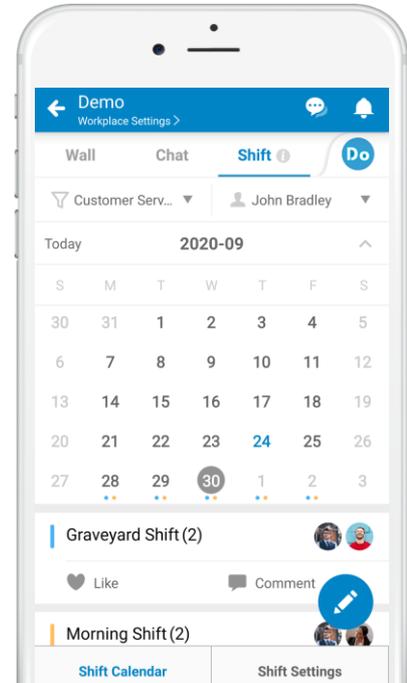
Shift tables



Scheduling



Verify shifts



3.8 Overtime

Manage employee overtime hours to avoid overload.

Online overtime application with compensations.

Achieve a healthy work-life balance!



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Overtime

No more burnouts!
Use Overtime to help employees
achieve a healthy work-life balance.

- Hour or half-hour overtime base unit.
- Select compensatory leave or overtime pay.
- Set request policy.
- Linked to HR for application approval.
- Multi-level approval, if needed.
- Comment section for communication.
- Overtime report available.

← Apply Overtime Submit

*Date (From) >	2020-09-17
*Time (From)	18:00
*Date (To) >	2020-09-17
*Time (To)	20:30
Duration	2.5 hours
*Compensation >	Compensatory Leave

Photos +

Files +

Remark
Preparing marketing materials for print.

Demo Workplace Settings > Chat Overtime Do

Search

Cara Landon Sales Just now
Compensatory Leave
2020/09/18 Fri 18:00 ~ 22:30
4.5 hours
OT20090006 Submitted John Bradley

John Bradley Marketing 12 mins ago
Compensatory Leave
2020/09/17 Thu 18:00 ~ 20:00
2 hours
OT20090001 Approved

My Overtime Approve Overview ▲

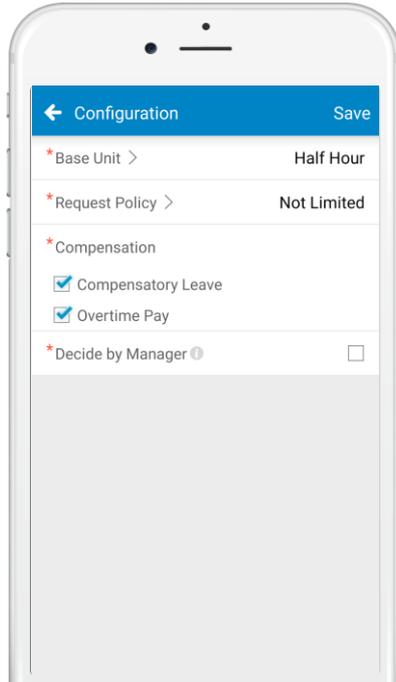
3.8 Overtime : Functions & Procedures



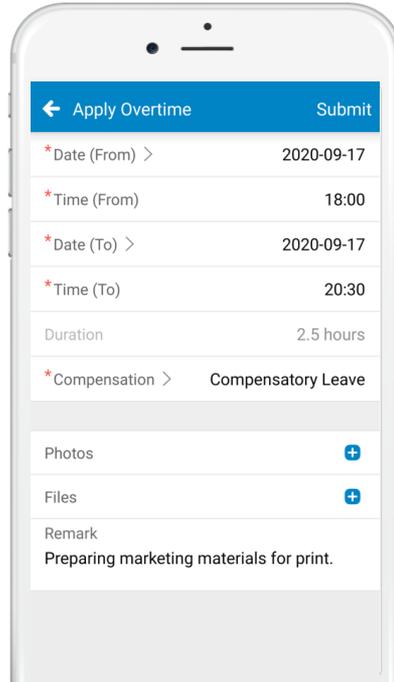
Web version only

3.8 Features (Available functions are dependent on member tool role)

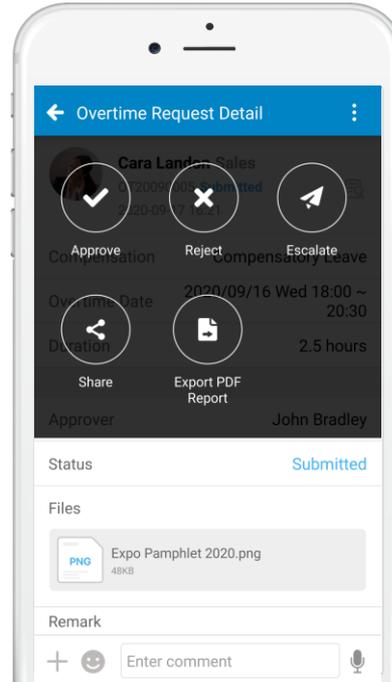
Settings



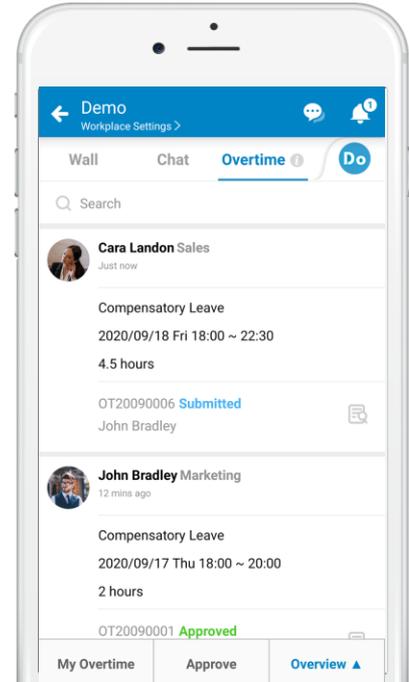
Apply



Approve



Records



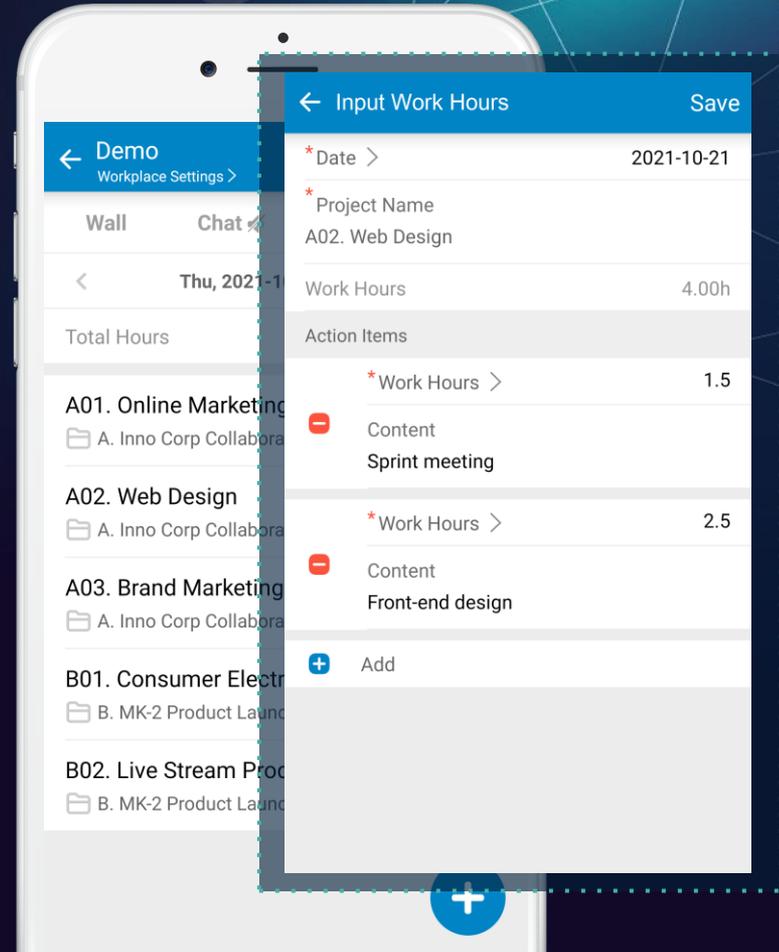
3.9 Timesheet

Efficiently keep track of employee and project work hours.
Timely allocate team resources and improve team productivity.

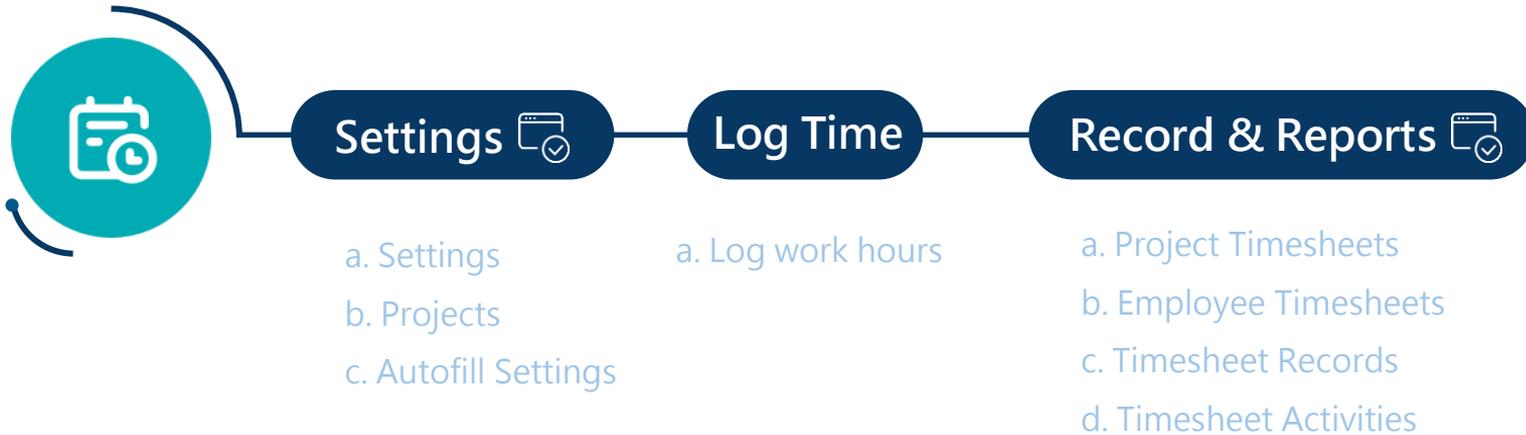
Timesheet

Use Timesheet to track employee work hours and project time tracking with ease!

- Task employees with projects.
- Timesheet allows employees to log their own work hours.
- Track employees' time spent on each task and project.
- Use notifications to remind employees to fill out their work hours.
- Linked to Overtime for overtime application when employees are working overtime.
- Timesheet reports available.
- Employees' activity records available.



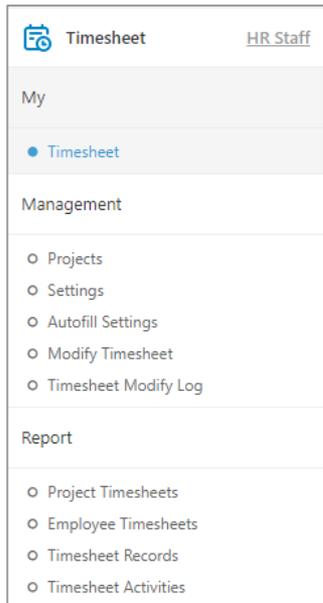
3.9 Timesheet : Functions & Procedures



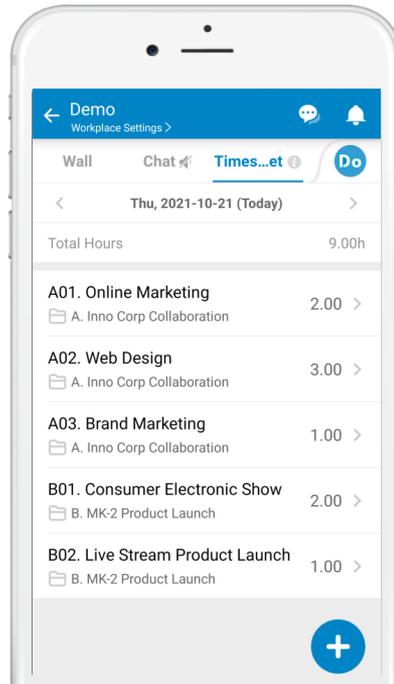
Web version only

3.9 Features (Available functions are dependent on member tool role)

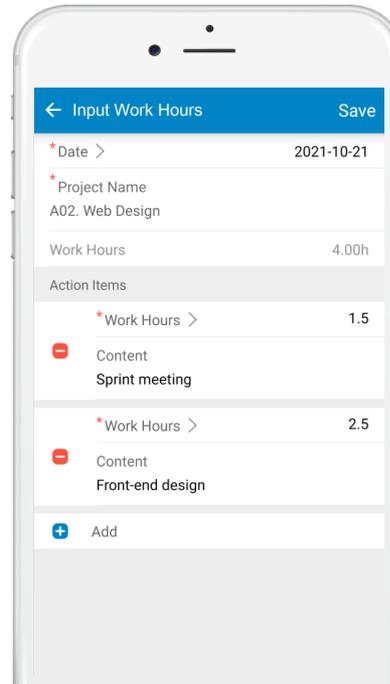
Web version Settings & reports



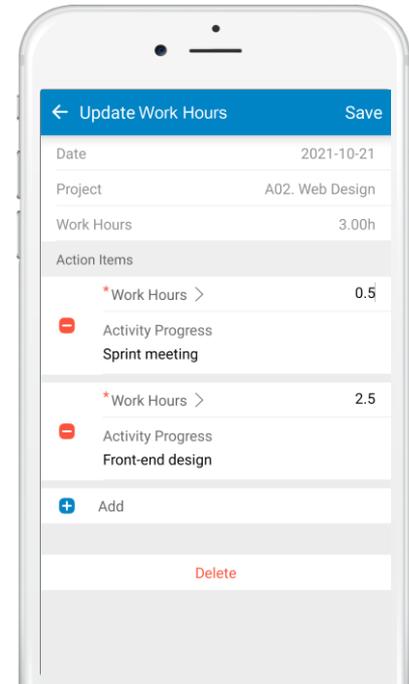
Daily overview



Log time



Edit



3.10 Expenses

Streamlined expense reimbursement workflow with progress tracking.



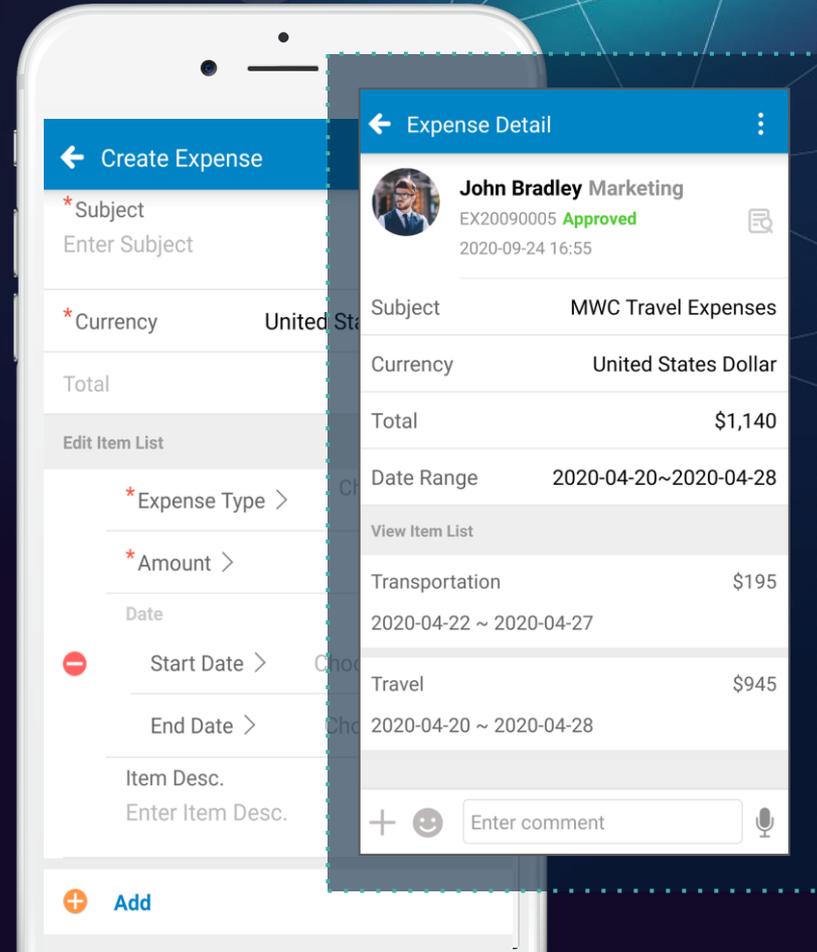
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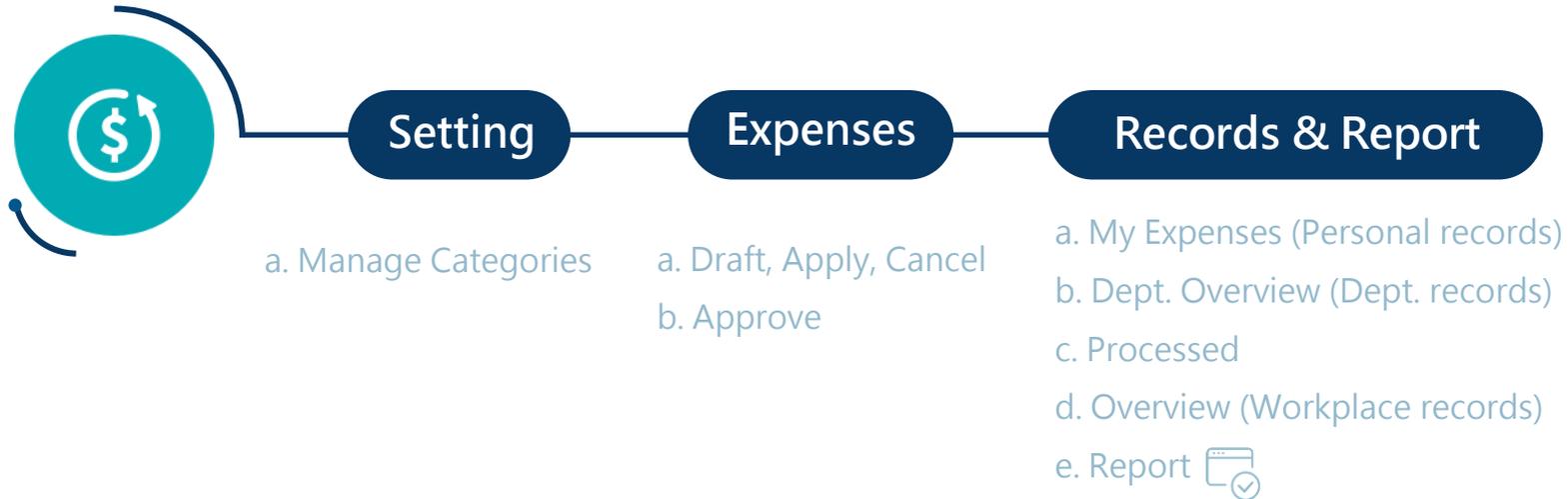
Expenses

Paperless reimbursement process.
Past requests are archived for audit.

- Built-in common expense types, including travel, transportation, communication, meals, etc.
- Create new expense types your workplace uses.
- Drafts can be saved or submitted for approval.
- Attach files or photos as receipts or proof.
- Linked to HR for managers approvals.
- Supports multi-level approval process or select a designated approver.
- Use the comment section to communicate details.



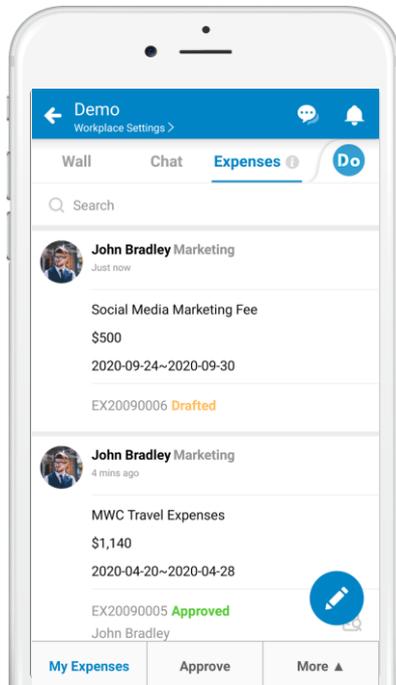
3.10 Expenses : Functions & Procedures



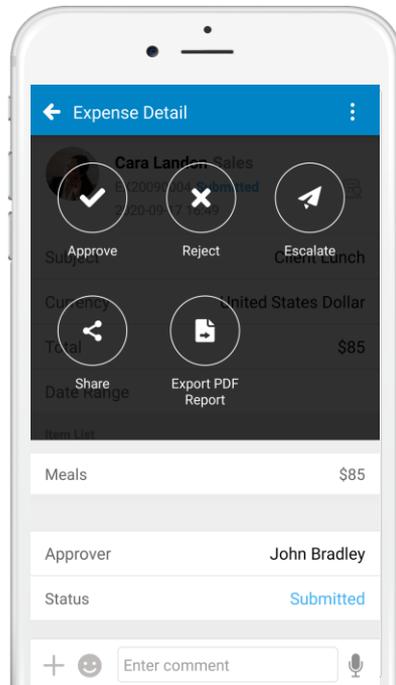
Web version only

3.10 Features (Available functions are dependent on member tool role)

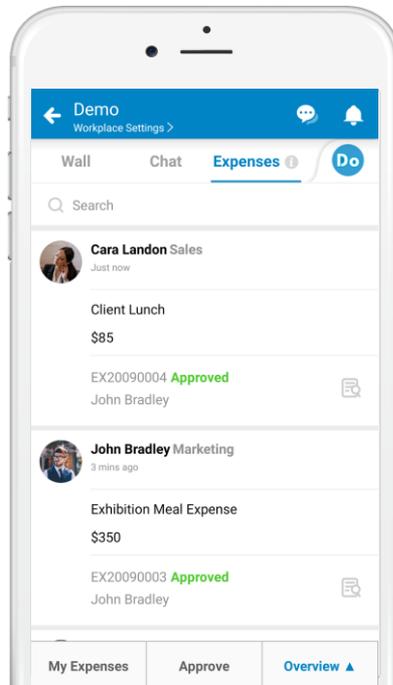
My Expenses



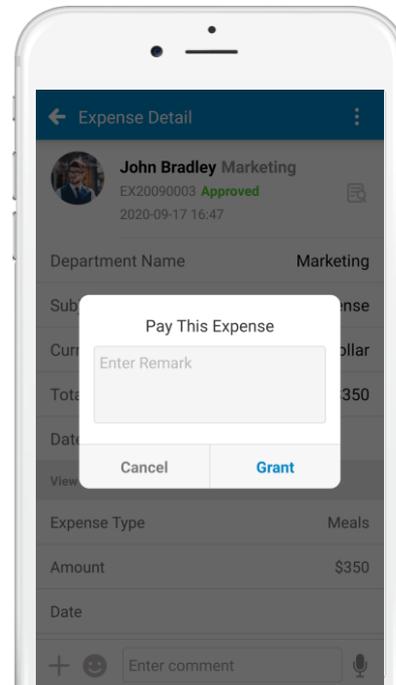
Approve



Overview



Grant



3.11 Approvals

Simplify a typically cumbersome process.
Make timely and informed decisions with Approvals.



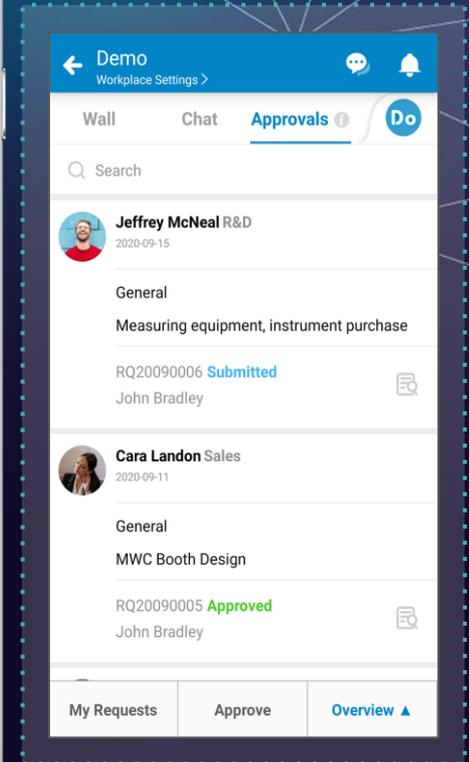
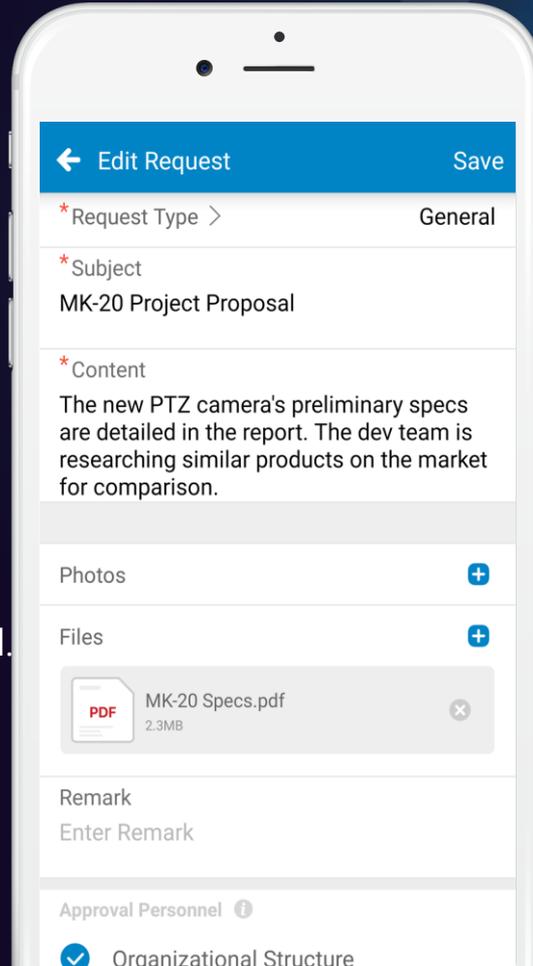
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Approvals

Streamlined approval process.
Improve team productivity.

- Linked to HR for managers approvals.
- Create new approval types your workplace uses.
- Attach files or photos for references.
- Drafts can be saved or submitted for approval.
- Supports multi-level approval process or select a designated approver.
- Use the comment section to communicate details.



3.11 Approvals : Functions & Procedures



Setting

a. Manage Categories

Approvals

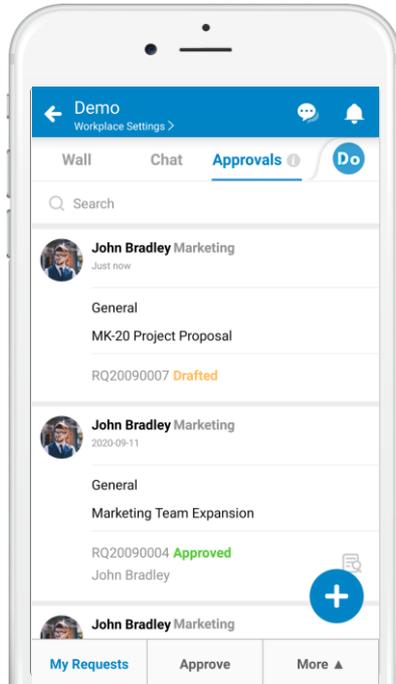
a. Draft , Apply, Cancel
b. Approve

Record

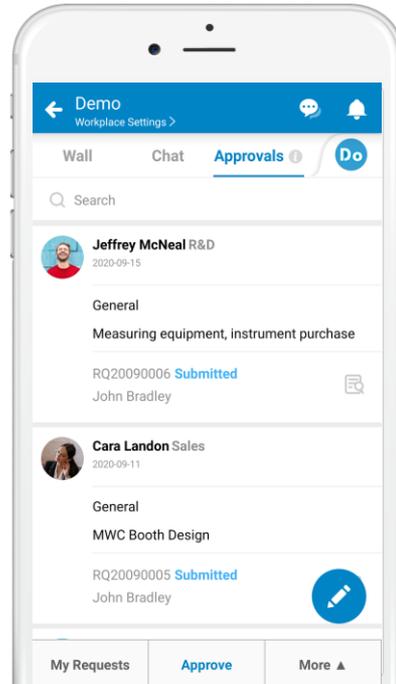
a. Requests (Personal records)
b. Dept. Overview (Dept. records)
c. Processed
d. Overview (Workplace records)

3.11 Features (Available functions are dependent on member tool role)

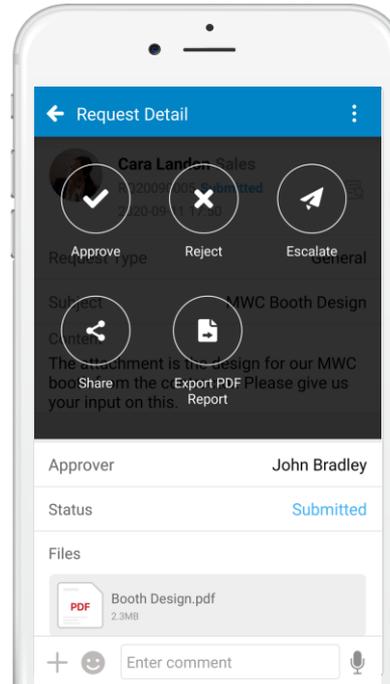
Requests



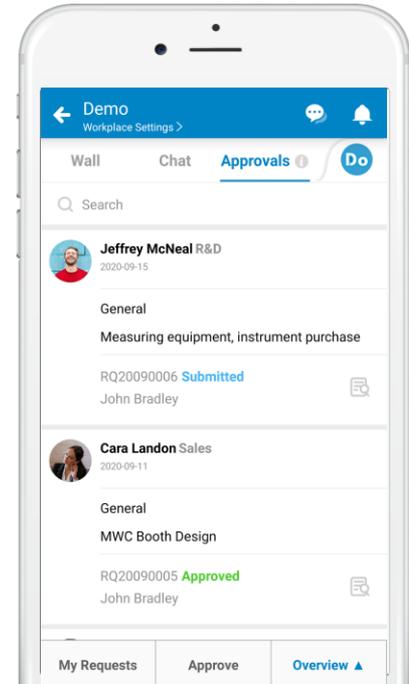
Approve



Approve, reject or escalate



Overview



3.12 Conf. Rm

Manage and book conference rooms for meetings or events!

Linked to Event for advanced booking.

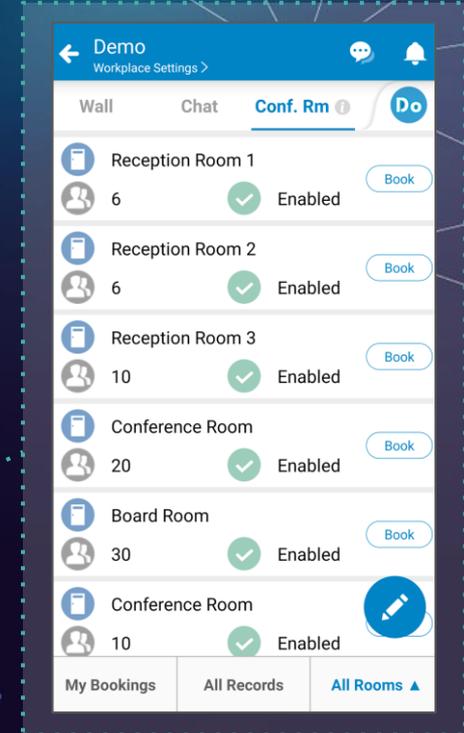
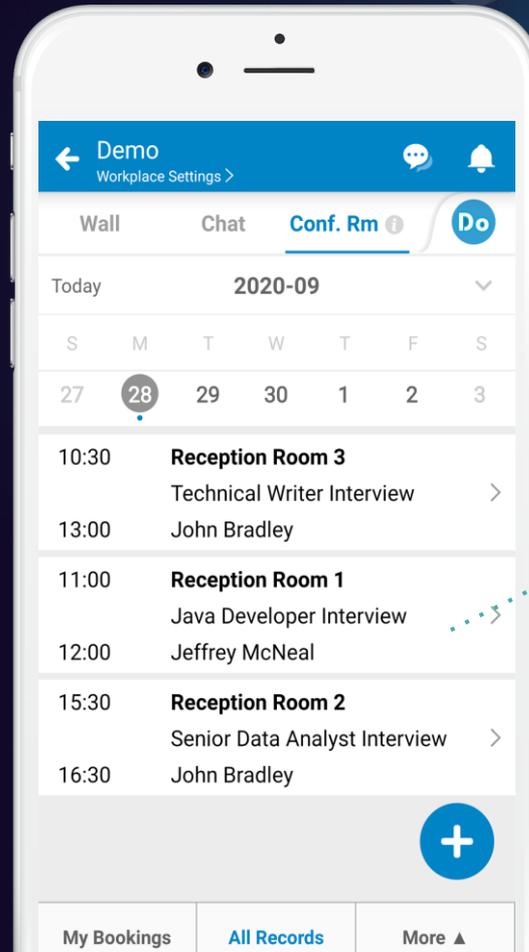


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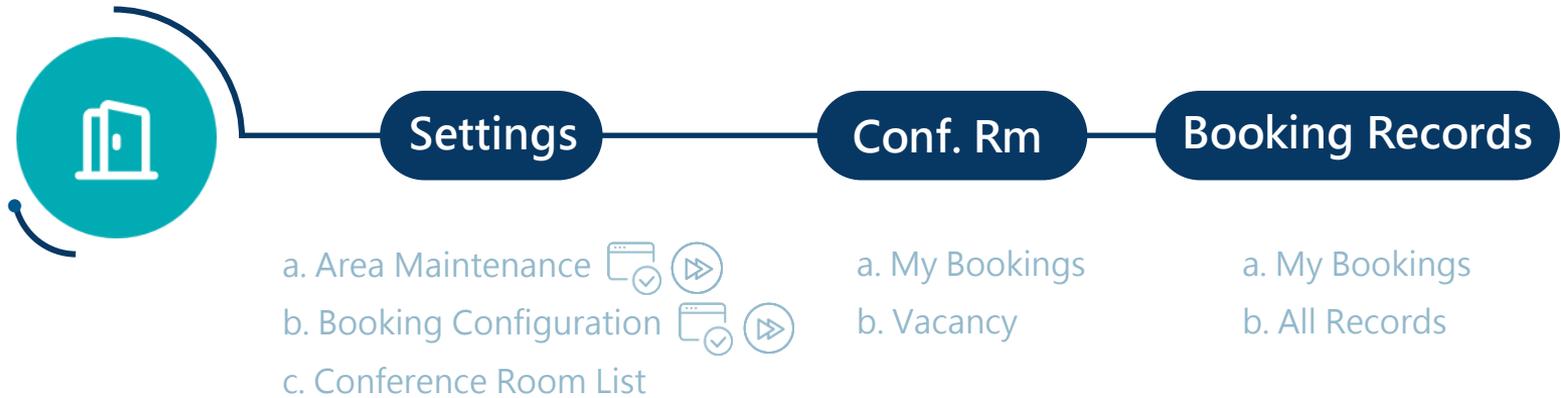
Conf. Rm

Manage conference room to maximize their use and avoid conflicts.

- Book rooms in advance.
- Linked to the Event tool.
- An effective resource management tool.
- The web version allows recurrent room booking.



3.12 Conf. Rm : Functions & Procedures



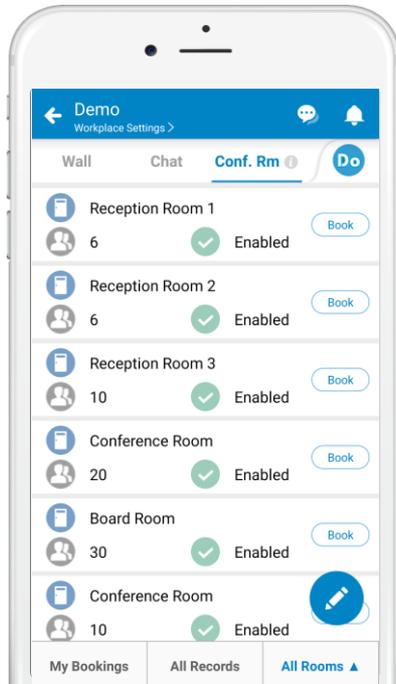
Web version only



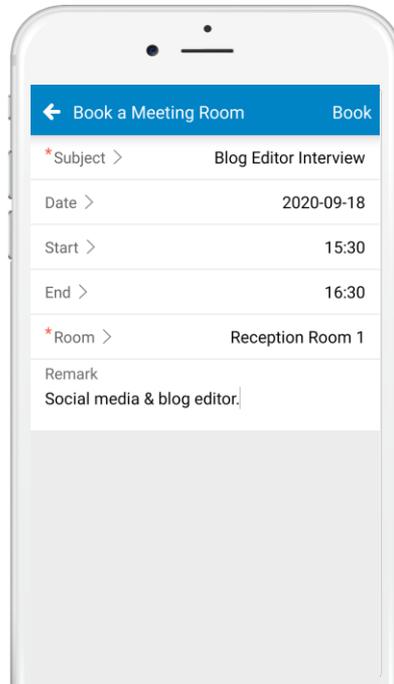
Set to default value, can be skipped for now .

3.12 Features (Available functions are dependent on member tool role)

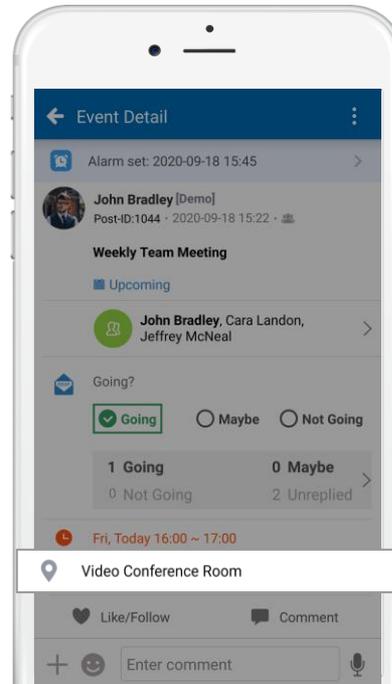
Booking Configuration



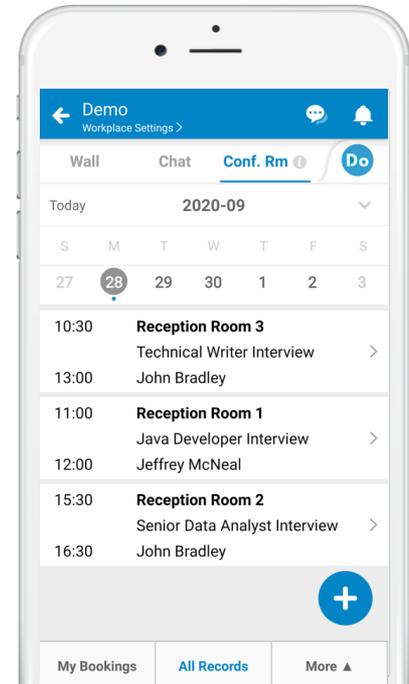
Book



Book via Event



All Records



3.13 CRM

Store your client, customer contact information and document activities and exchanges to keep them satisfied.



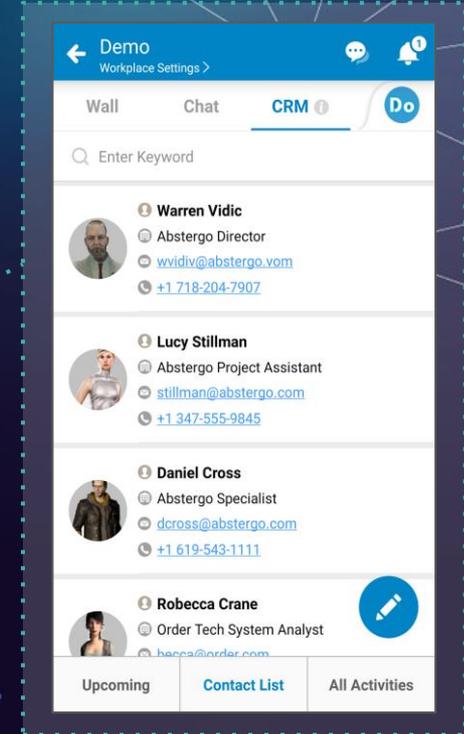
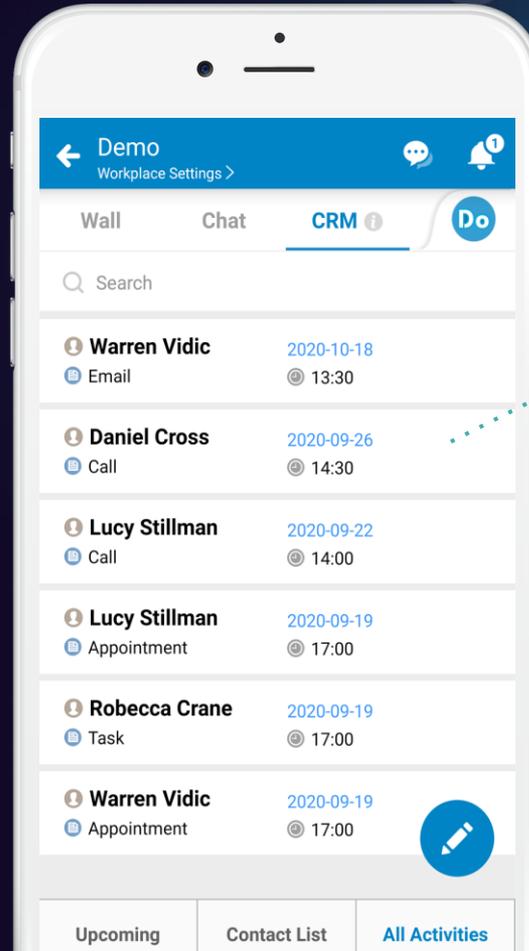
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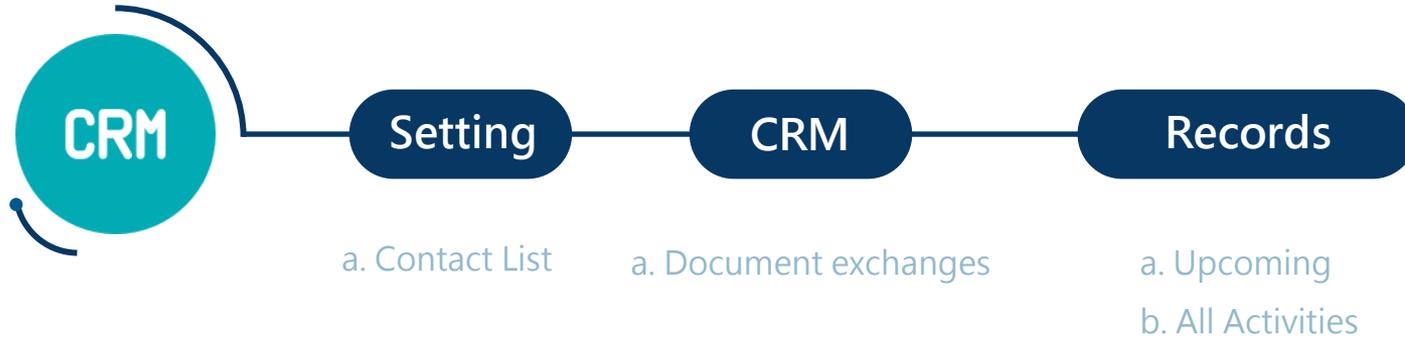
CRM

Manage clients with precision to raise client satisfaction!

- Import contact info from your phone.
- A centralized place of the clients' contact info.
- Document interactions and exchanges and never forget a thing!
- An effective way to maintain client relationships.
- The managers and tool admins are allowed to view members' data.

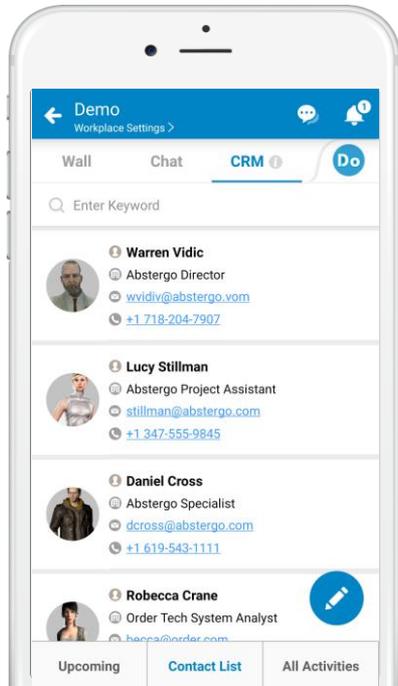


3.13 CRM : Functions & Procedures

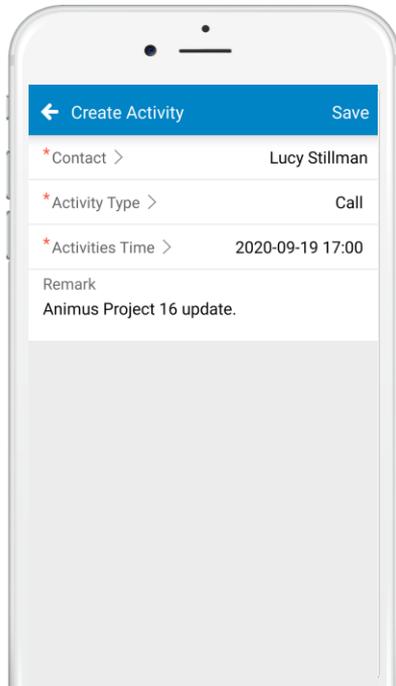


3.13 Features (Available functions are dependent on member tool role)

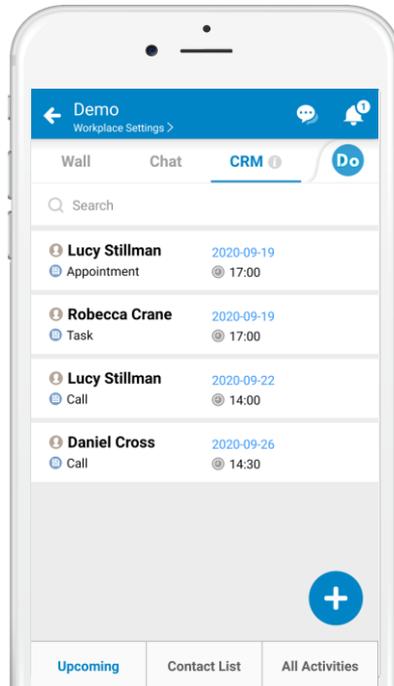
Contact List



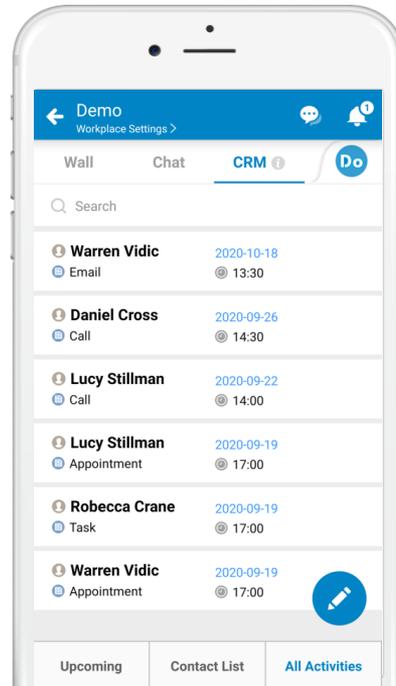
Create Activity



Upcoming



All Activities





Click to know more

Set your workplace
in 5 steps

Get to know WorkDo



Basic settings

How to use
the basic tools?



Work easy,

Work smart !



www.workdo.co/en



[WorkDo](#)



[Resource Center](#)