



Absence management Getting Started

On demand business automation application

Introduction

Thank you for choosing MyWebWorkplace as your Absence Management software.

MyWebworkplace has been designed to be simple and quick to setup but able to accommodate all business models. Its versatility gives you complete control over its implementation and a tight fit to your business processes.

What follows is a step by step guide to getting started. If you need more information on any point please refer to the User Guide.

Getting Started

1. Creating your account

Registering and creating your account is a very simple operation that takes just a few minutes.

- ➔ Create your account by completing the New client form @ http://mwwp.me/client_new
- ➔ NOTE: The site name is usually the name of your organisation and the site token is a 3 or 4 character abbreviation of your site name.
- ➔ An email will be sent to your email address. Click on the confirmation link on the email.
- ➔ Another email will be sent containing access instructions and additional support information.



[See the how to video](#)

2. Start date

It is essential that every employee has a start date set to correctly calculate some entitlement privileges.

- ➔ When you first registered your MyWebWorkplace account you will not have added an employment start date for yourself. Do this @ People > *your name* > Edit > Employment start

3. Licences

The account will initially contain 3 free licences, one of which is used for the employee who registered the account.

- ➔ Additional licenses can be added @ Admin > Licences.



[See the how to video](#)

4. Countries

On registration your main locations' country will be added to your account. If you have other locations in different countries these will need to be added.

- ➔ Additional Countries can be added @ Admin > Settings > Lookup Tables > Country Codes

- ☞ Tick the countries that you have offices in

Note: If your country is not listed let us know and we will add it

5. Calendars

Multiple calendars can be added to suit all your employees' locations and countries. Each Calendar holds the standard holidays for the chosen country, however you can edit these holidays and add others if necessary.

- ☞ By Default a calendar is included for the United Kingdom (England and Wales)
- ☞ Additional Calendars can be added for other Countries @ Admin > Settings > Calendar sets > Add



[See the how to video](#)

6. Work Patterns

A work pattern defines when an employee is working.

- ☞ By default a Work Pattern is included for Monday to Friday 9am – 5.30pm with a break between 12.30 and 1.30.
- ☞ Additional Work Patterns can be added to suit all your employees' @ Admin > Settings > Work Patterns > Add



[See the how to video](#)

7. Groups

Groups should include all your departments within your organisation. Each employee is given a 'home group' which defines who will be approving their leave, i.e. their manager.

- ☞ By Default a Group is included called Company.
- ☞ Additional Groups can be added @ Groups > Add



[See the how to video](#)

8. Areas

Areas should include all your geographic locations.

- ☞ By default an Area is included called Global
- ☞ Additional Areas can be added @ Area > Add



[See the how to video](#)

9. Absence Types (optional)

Annual and compassionate Leave are the most common types of absence requested by an employee. Other absence types are available, however initially they are switched off and would need to be turned on before an employee can request that type of absence.

➔ Edit your Absence types @ Admin > Holiday/Leave > Absence Types



[See the how to video](#)

10. Absence Rules (optional)

Absence rules are built to assist the manager in approving leave requests. They automatically check every request against an unlimited number of rules that you specify. This might include ensuring department levels never drop below a critical number or that key personnel are never away at the same time. Most rules should be added to warn the manager of the rule conflict unless it is absolutely critical, in which case the rule should be mandatory with no override.

➔ Edit your Absence rules @ Admin > Holiday/Leave > Absence Rules



[See the how to video](#)

11. Annual Increments (optional)

These increments automatically adjust your employees entitlement depending on the employees length of service. The appropriate proportion of the adjustment is applied at the beginning of your annual leave period and the remainder on your employees start date anniversary.

➔ Edit your Annual Increments (service days) @ Admin > Holiday/Leave > Annual Increments



[See the how to video](#)

12. Mandatory Leave (optional)

This is leave that is enforced by company annual leave policy to cover any mandatory shutdown or closure of your organisation. The Mandatory leave is applied to all your employees who follow the specified mandatory leave calendar.

➔ Add your Mandatory Leave @ Admin > Settings > Calendar sets > Add



[See the how to video](#)

13. Core defaults

Defaults can be created to speed up the adding of new employees @ Admin > Settings > Core defaults. Simply select the options that suit most of employees. These can be changed at any time to suit the employees you are currently adding. This is particularly useful when you are using the bulk employee upload feature described below.

14. Delay welcome emails

To delay the sending of the welcome email to each employee until MyWebWorkplace setup is complete and tested go to Admin > Settings > Delayed Emails

15. People

Now it's time to add your employees. If you do not want these employees to receive their welcome email straight away then go to Admin > Settings > Delayed Emails.

➔ Bulk Upload

1. Groups of employees can be added in bulk
2. Download the Microsoft Excel file to your computer @ Admin > Files > 'Bulk Users Template'
3. Add your employees to the 'Bulk Users Template'
4. Upload the 'Bulk Users Template' @ Admin > Files > 'Bulk User Upload'

NOTE: It is important to remember that employees uploaded via the above process will take on the core defaults so it is recommended that groups of employees with the same settings such as work patterns and calendars are uploaded together and the core defaults are changed to suit the next batch of employees to be uploaded. If all but a few have the same settings it would be easier to edit their details individually (see below).



[See the how to video](#)

➔ Individually

1. New employees can be added @ People > Add
2. Initially new employee will be given the core defaults. You can edit an employees information @ People > *employee name* link > Edit



[See the how to video](#)

16. Managers

Lastly the groups that were added previously need to have a manager assigned to them. All employees that belong to that group will be managed by this employee.

➔ Assign a manager for each group @ Groups > Group link > Edit

17. Check it over and you're done

18. Send welcome emails

If welcome emails had been delayed (no.14) they will need to be released.

➔ Future welcome emails can be turned on @ Admin > Settings > Emails > Delayed emails

- Tick 'Send email to joining user' and [Submit]
- Release the held emails by ticking 'Take this action' in *Send all delayed emails from the Email Queue* section and [Submit]

Contact Support

Customer Service

Contact customer service to get help with:

- Pre-sales enquiries
- To place an order
- Upgrades
- Cancellations
- Licences
- User ID / password issues

Call 0844 736 1820 ext 1

Technical Support

For technical issues

Raise a support ticket at <http://support.mywebworkplace.net/home>

Email your support request to support@mywebworkplacenet.zendesk.com

Call 0844 736 1820 ext 2 (available between 9.00 and 17.00 GMT)

If you are a VAR Partner and have a query please call

0844 736 1820 ext 3

Other lines of support

Forum - <http://support.mywebworkplace.net/forum>

Blog - <http://blog.mywebworkplace.net/>

Resources - <http://blog.mywebworkplace.net/page/Resources.aspx>

How to videos - <http://www.mywebworkplace.net/how-to.aspx>