



HEXAGON

HEXAGON XALT: PTO APPLICATION USER GUIDE

Xalt PTO User Guide
8 March 2019

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SETTING UP RECORDS

To begin using the PTO Application there is some setup required. An admin user will be required to create, create roles, job categories, company holidays, vacation types, accrual info based on how much paid time off is allocated per year. Lastly, “Employees” should be created **after** the other records have been created (roles, company holidays, vacation types etc). The workbench “Time Off Request – Setup” should be assigned to the admin user only.

Xalt Notification Server is Required

When an employee enters a new PTO request, a notification will be sent to the manager
To receive notifications, you will need them set up on your system. Setting up notifications is not covered in this guide. Contact your sales rep or email support.ps@hexagon.com for more information on setting up notifications.

WORKBENCH: TIME OFF REQUEST-SETUP

LAUNCHERS

EMPLOYEE ROLES

The Employee Roles launcher enables the admin user to manage different roles based on position. For example, you create a role for “field technician” and for “Site Supervisor”. Figure 1, below shows how to add a new role

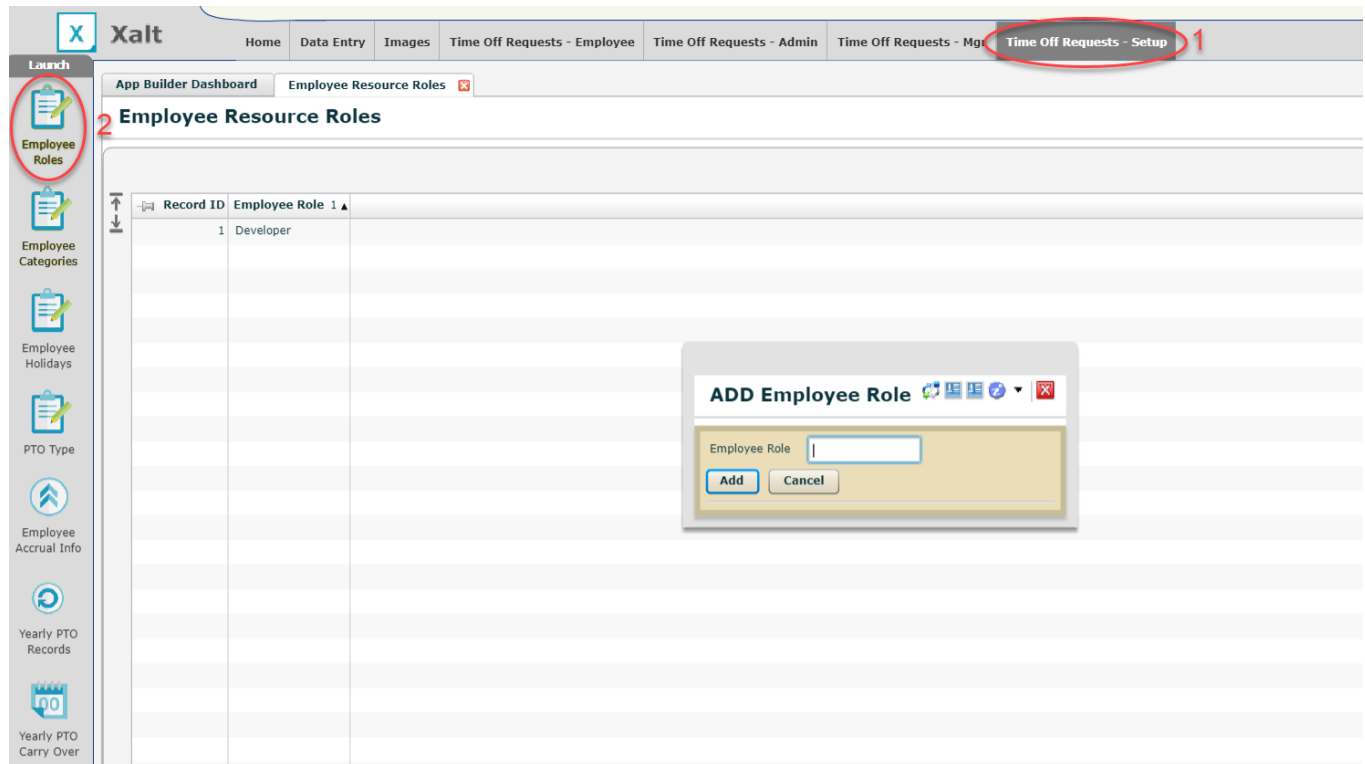


Figure 1: Creating Employee Categories

EMPLOYEE CATEGORY

The Employee Category launchers enables the admin user to manage different divisions within the company. This will allow the administrator to place employees in different departments. Example categories: contractor, services,

etc. See Figure 2.

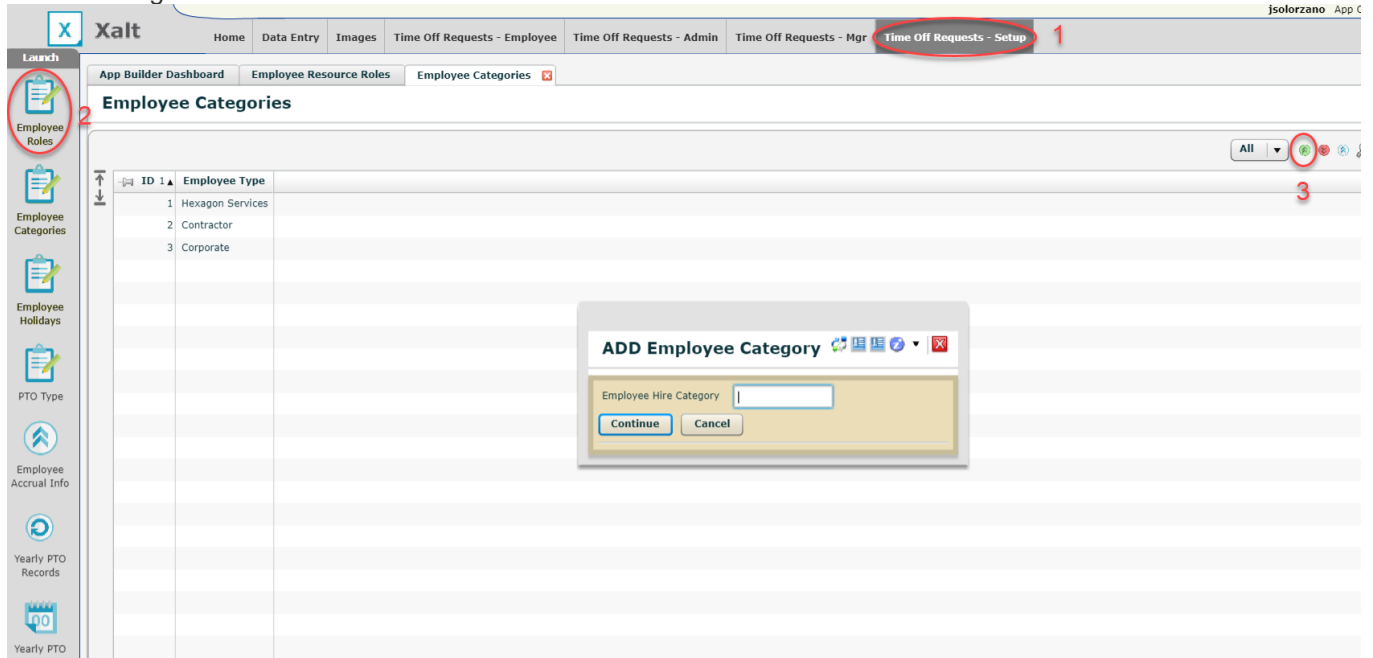


Figure 2: Creating Employee Categories

EMPLOYEE HOLIDAYS

The Employee Holidays launcher manages employee holidays. This will allow you to choose what holidays your company will award for the year. From the example below, you can see how to add a new holiday.

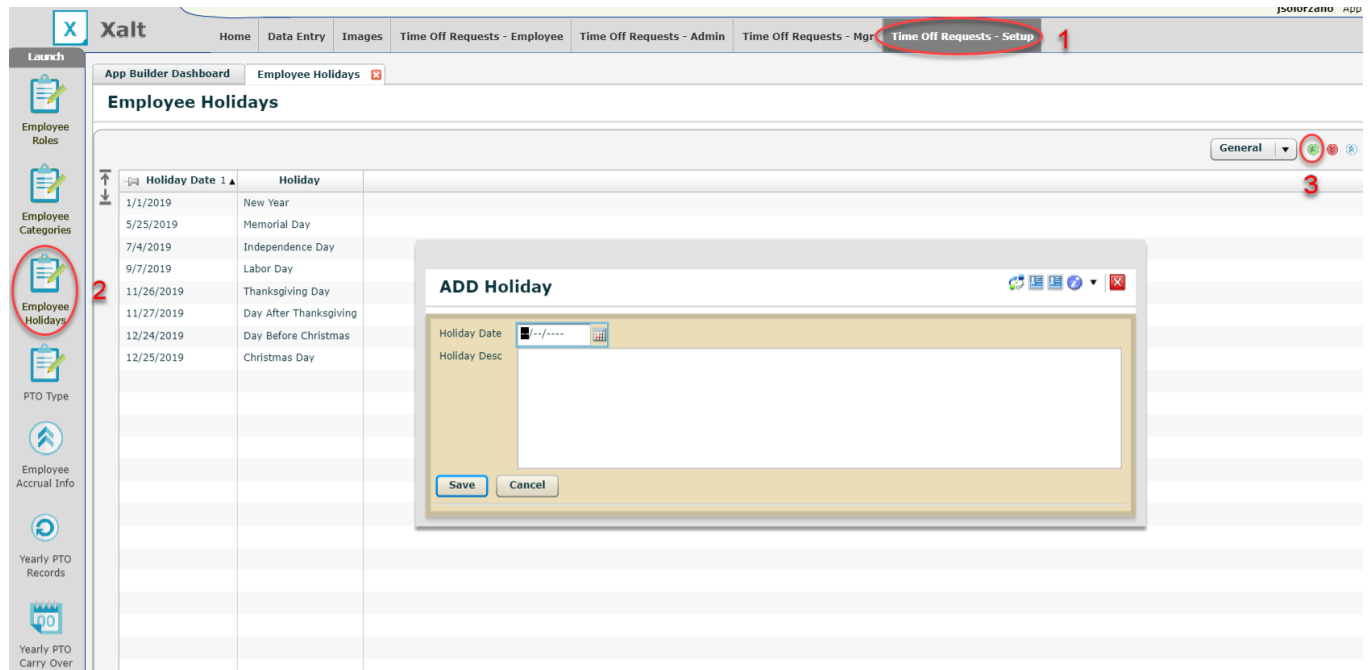


Figure 3: Designating Company Holidays

PTO TYPE

The PTO Type launcher enables the admin user to designate employee PTO request types. Example PTO types: Floating Holiday, Sick Time, etc. The sequence column allows the admin to dictate the order in which the PTO types are displayed, the smaller the sequence number, the higher in the list the PTO type will appear in the list. Example: The vacation request type must be listed first, and Company Holiday must be listed last, "Vacation" would get a sequence of "1", whereas "Pay Day" would get a sequence number of "9,999." See Figure 4 below.

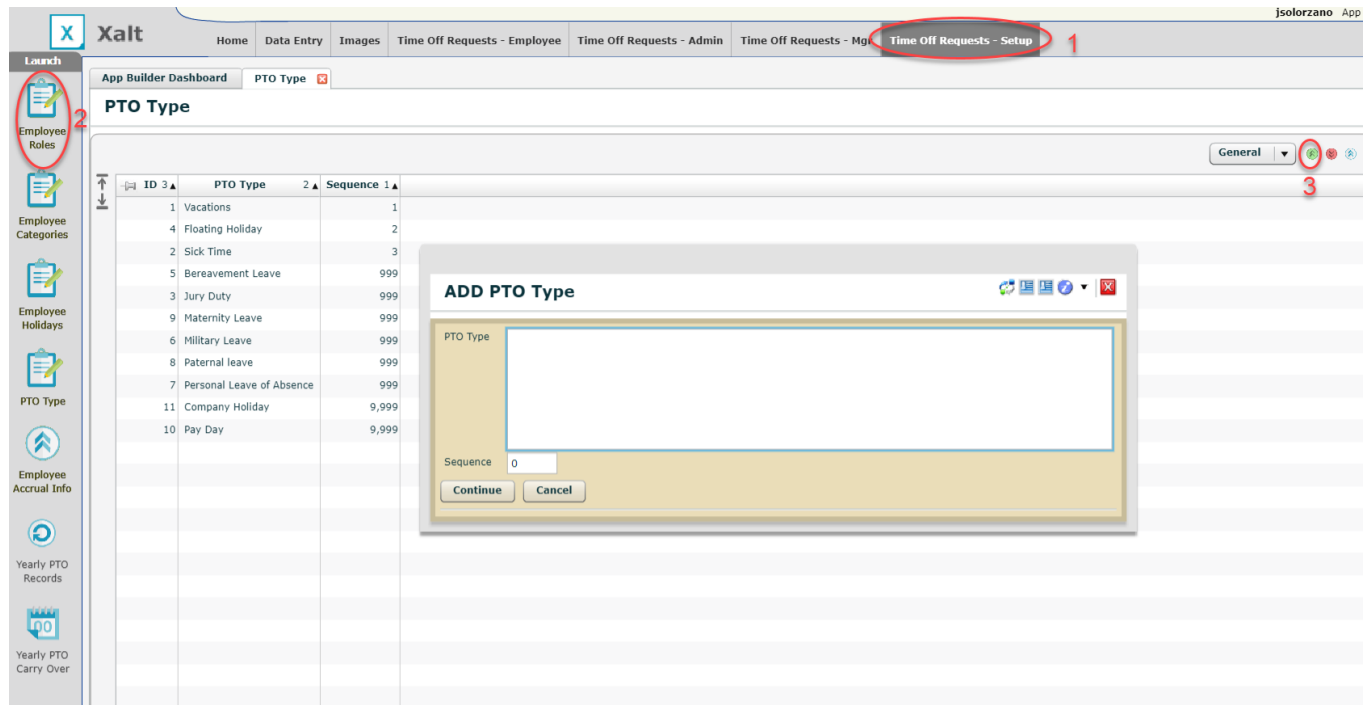


Figure 4: Designating PTO Categories

EMPLOYEE ACCRUAL INFO

The Employee Accrual launcher enables the admin user to manage employee vacation accrual rate. The accrual rate is based on how much vacation time the employee is entitled to per pay period.

Example:

The employee is entitled to 15 vacation days a year. The calculation would be as follows:

15x8hours a day=120 hours a year. Then, 120/24 (pay periods in a year if payroll is issued bi-weekly) =5.0

5.0 is the accrual rate for the year. A max accrual rate can be created, this function will prevent an employee from accruing vacation time beyond the maximum amount. See Figure 5.

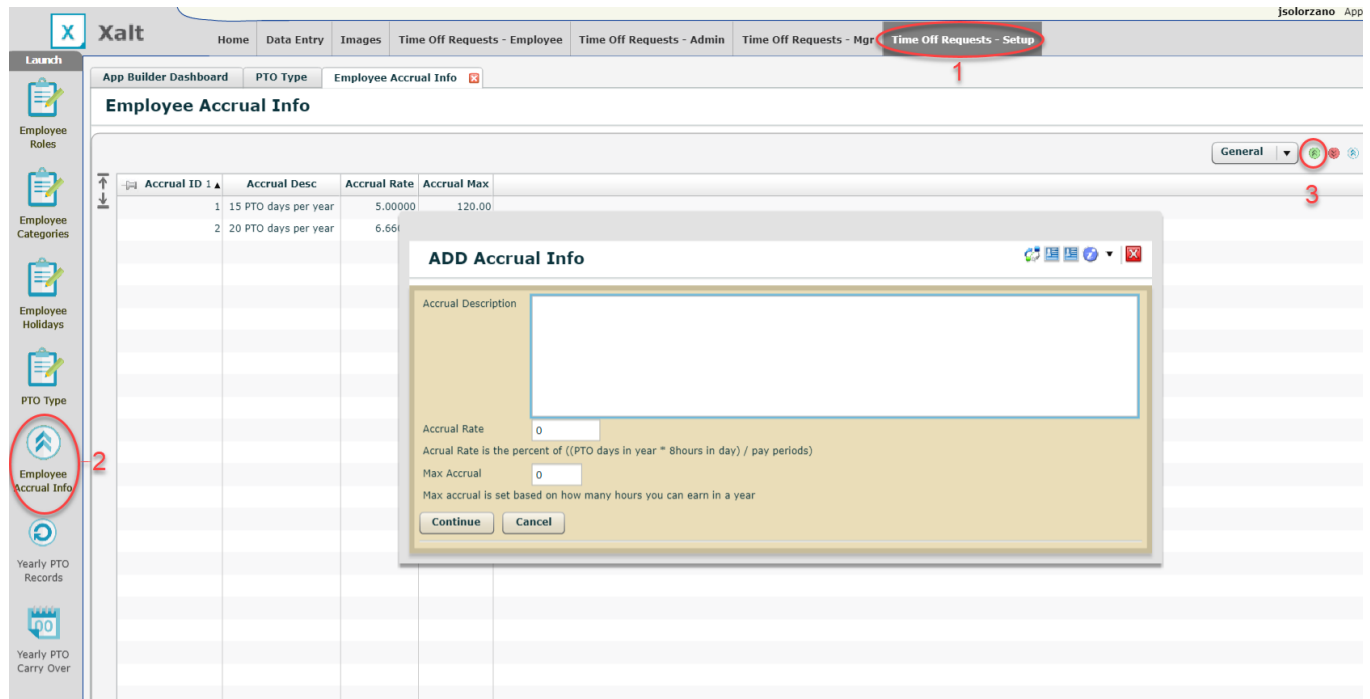


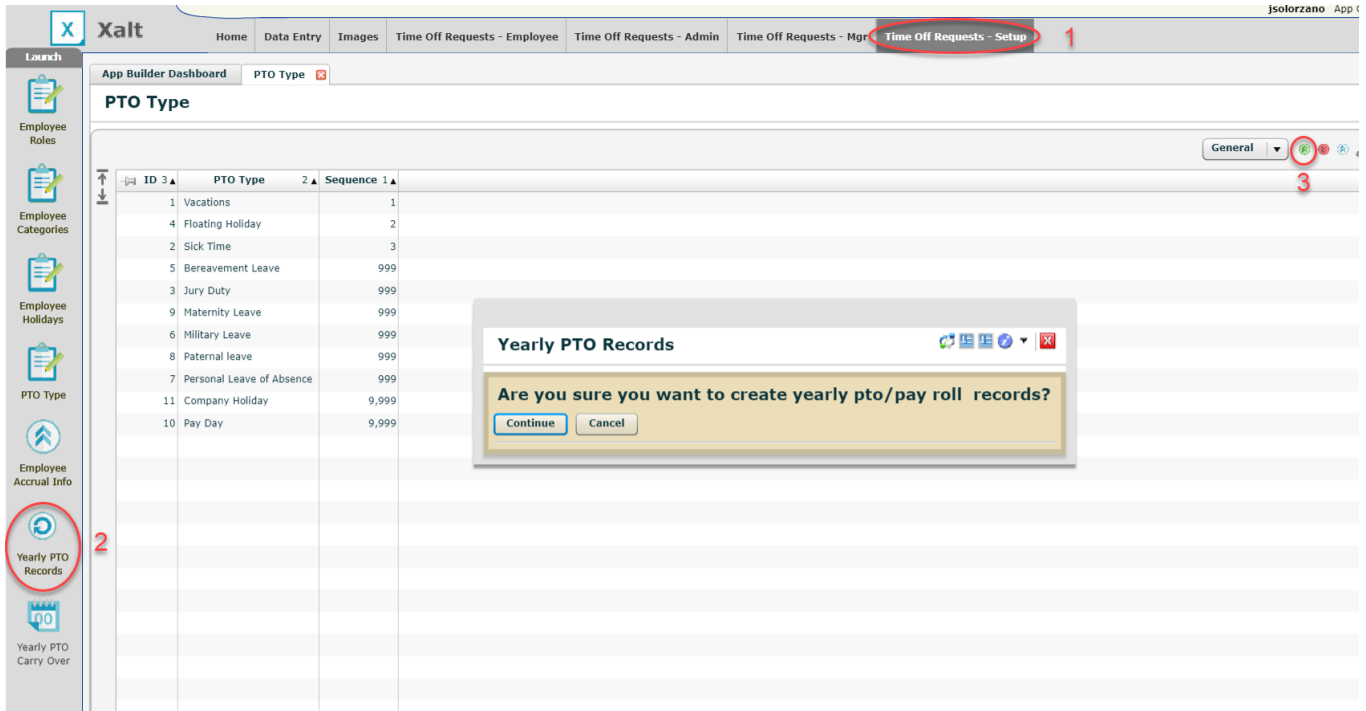
Figure 5: Designating an employee's accrual rate

YEARLY LAUNCHERS

These launchers need to be run once a year. This will setup your data for your calendar and if you need to carry over any vacation time for your employees from the previous year.

YEARLY PTO RECORDS

The purpose of the yearly launchers is to manage moving holidays from year to year. This launcher is required to run at the start of every new year. The Yearly PTO Records will create empty records for holiday days and payroll dates. This is used with the calendars to see what days are for holidays and paydays. When the launcher is selected, it will run the action and close. See Figure 6.



ID	PTO Type	Sequence
1	Vacations	1
4	Floating Holiday	2
2	Sick Time	3
5	Bereavement Leave	999
3	Jury Duty	999
9	Maternity Leave	999
6	Military Leave	999
8	Paternal leave	999
7	Personal Leave of Absence	999
11	Company Holiday	9,999
10	Pay Day	9,999

Figure 6: Designating an employee's accrual rate

YEARLY PTO CARRY OVER

The purpose of the yearly launchers is to carry over unused Vacation time for every employee. This will be to be run once at the beginning of the year. When the launcher is selected, it will run the action and close. See Figure 7.

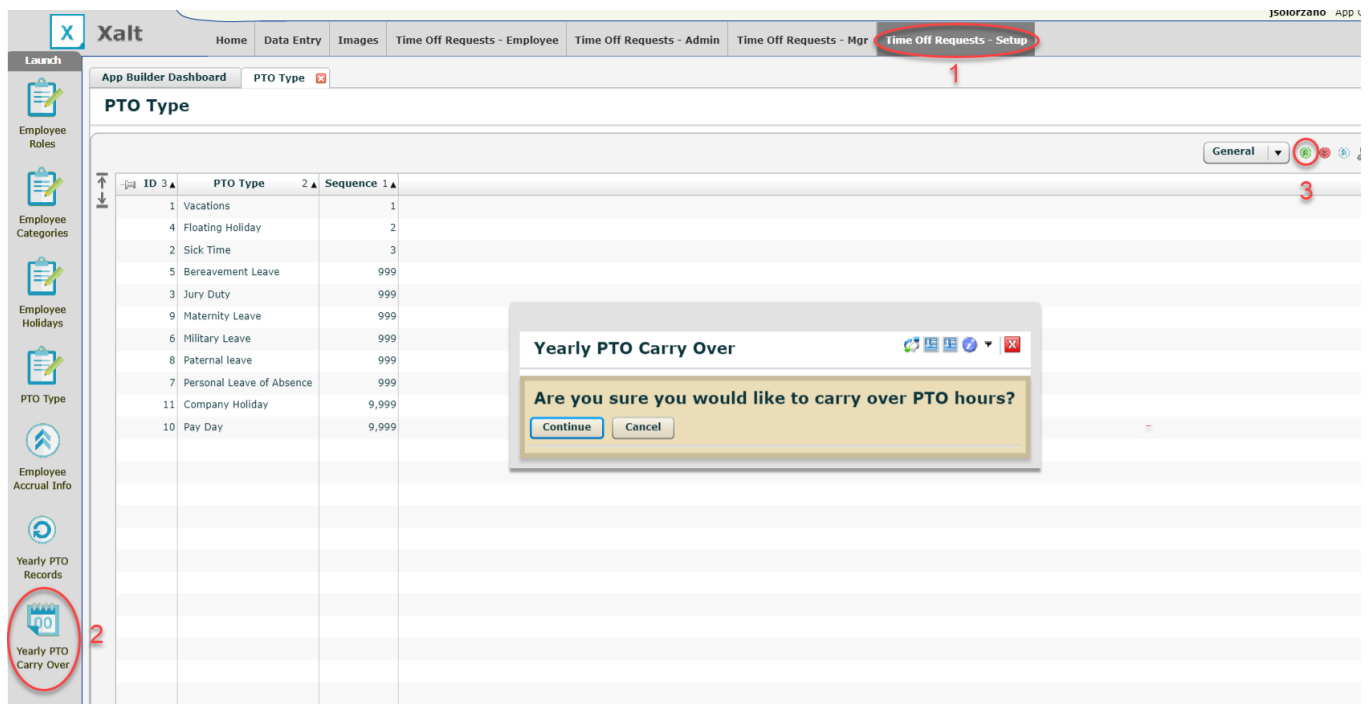


Figure 7: Yearly PTO Carry Over

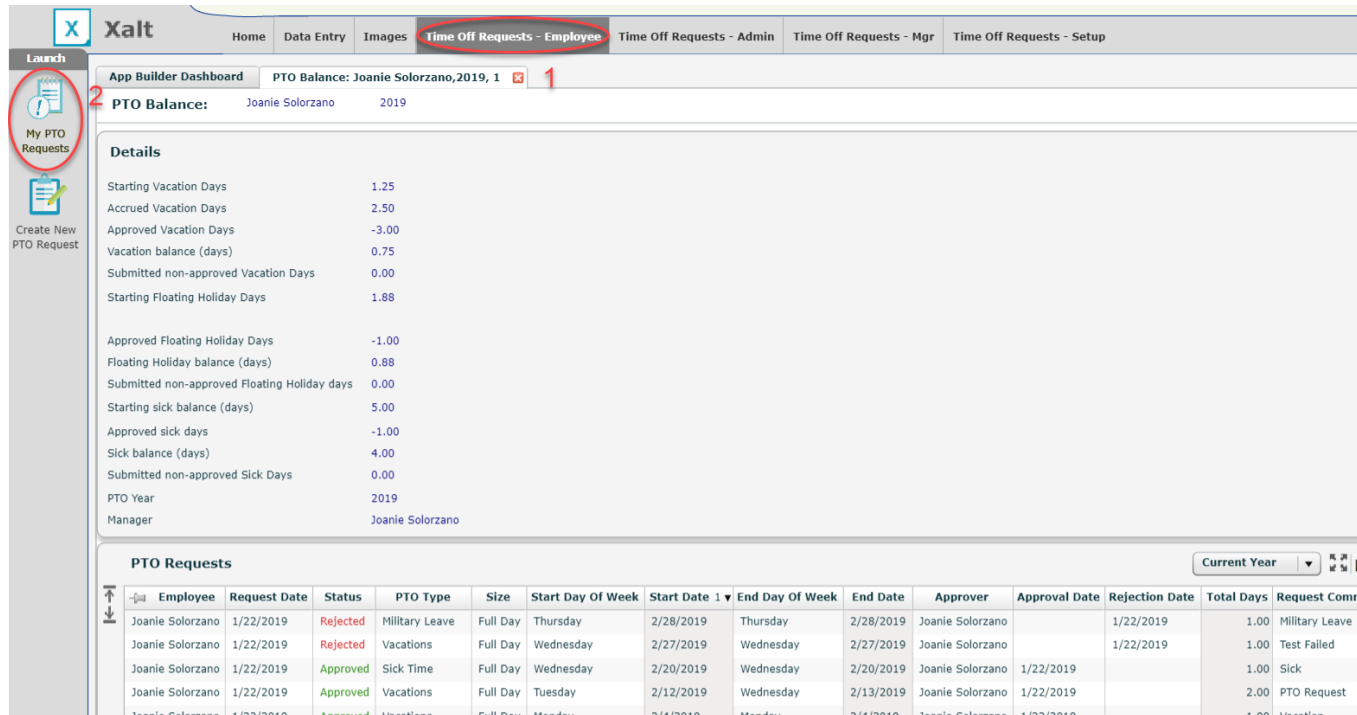
WORKBENCH: TIME OFF REQUEST - EMPLOYEE

This workbench is used so employees can view and manage their PTO time. You are able to view a history of your vacation time or place new vacation time request.

LAUNCHERS:

MY PTO REQUESTS

The purpose of this launcher is to provide employees their running total of time off request and existing balance. Employees will also be able to create, update, cancel, or delete PTO request. Every employee will be able to see this once an employee record is created for them by the admin. See figure 8.



App Builder Dashboard PTO Balance: Joanie Solorzano, 2019, 1

PTO Balance: Joanie Solorzano 2019

Details

Starting Vacation Days	1.25
Accrued Vacation Days	2.50
Approved Vacation Days	-3.00
Vacation balance (days)	0.75
Submitted non-approved Vacation Days	0.00
Starting Floating Holiday Days	1.88
Approved Floating Holiday Days	-1.00
Floating Holiday balance (days)	0.88
Submitted non-approved Floating Holiday days	0.00
Starting sick balance (days)	5.00
Approved sick days	-1.00
Sick balance (days)	4.00
Submitted non-approved Sick Days	0.00
PTO Year	2019
Manager	Joanie Solorzano

PTO Requests Current Year

Employee	Request Date	Status	PTO Type	Size	Start Day Of Week	Start Date	End Day Of Week	End Date	Approver	Approval Date	Rejection Date	Total Days	Request Comment
Joanie Solorzano	1/22/2019	Rejected	Military Leave	Full Day	Thursday	2/28/2019	Thursday	2/28/2019	Joanie Solorzano		1/22/2019	1.00	Military Leave
Joanie Solorzano	1/22/2019	Rejected	Vacations	Full Day	Wednesday	2/27/2019	Wednesday	2/27/2019	Joanie Solorzano		1/22/2019	1.00	Test Failed
Joanie Solorzano	1/22/2019	Approved	Sick Time	Full Day	Wednesday	2/20/2019	Wednesday	2/20/2019	Joanie Solorzano	1/22/2019		1.00	Sick
Joanie Solorzano	1/22/2019	Approved	Vacations	Full Day	Tuesday	2/12/2019	Wednesday	2/13/2019	Joanie Solorzano	1/22/2019		2.00	PTO Request
Joanie Solorzano	1/22/2019	Approved	Vacations	Full Day	Monday	2/4/2019	Monday	2/4/2019	Joanie Solorzano	1/22/2019		1.00	Vacation

Figure 8: Employee View, summary of PTO types available and all requests.

CREATE NEW PTO REQUESTS

The purpose of this launcher is to create a New PTO Request. As seen below, this launcher allows employees to create new vacation request. See Figure 9.

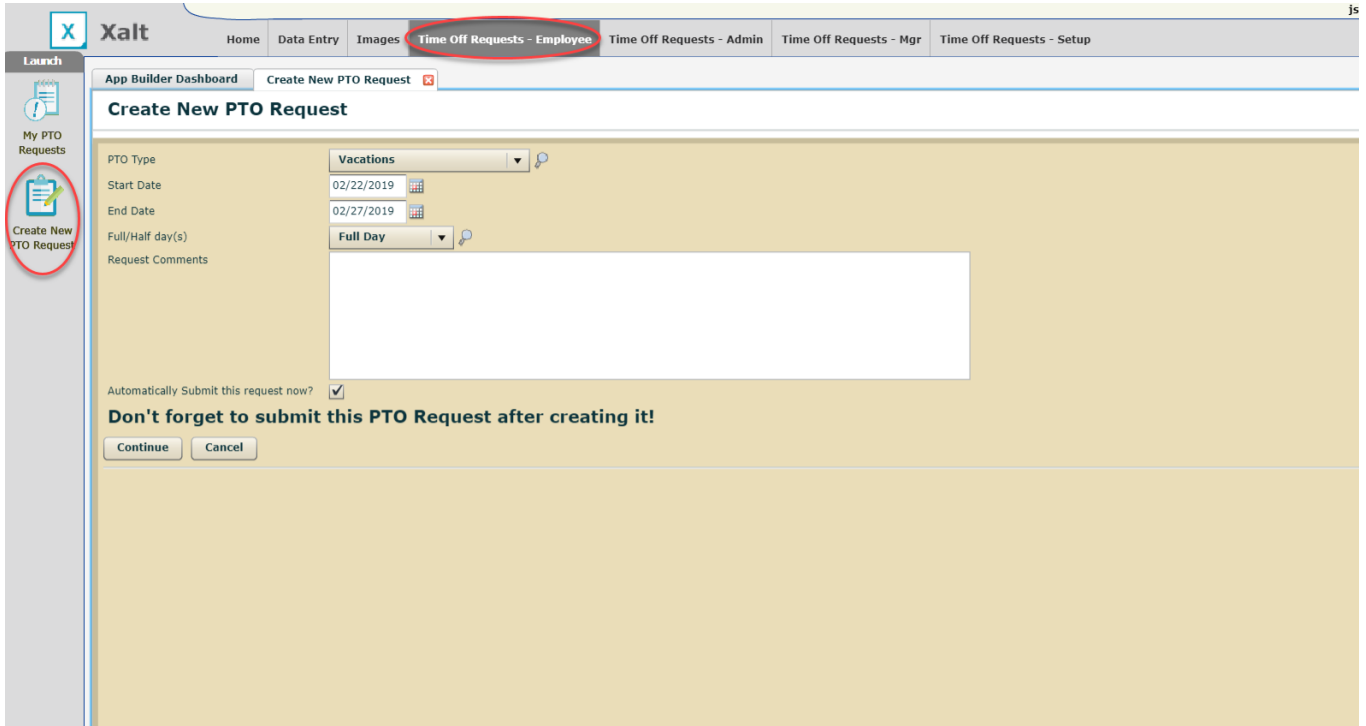


Figure 9: Creating a Time off Request

WORKBENCH: TIME OFF REQUEST - MGR

This workbench is used so that the manager can manage their employee PTO request. The manager can approve / deny PTO request.

LAUNCHERS:

MY PTO REQUESTS

The purpose of this launcher is to view a running total of the manager's time off request and existing balance. The manager can create, update, cancel, or delete PTO requests. See Figure 10.

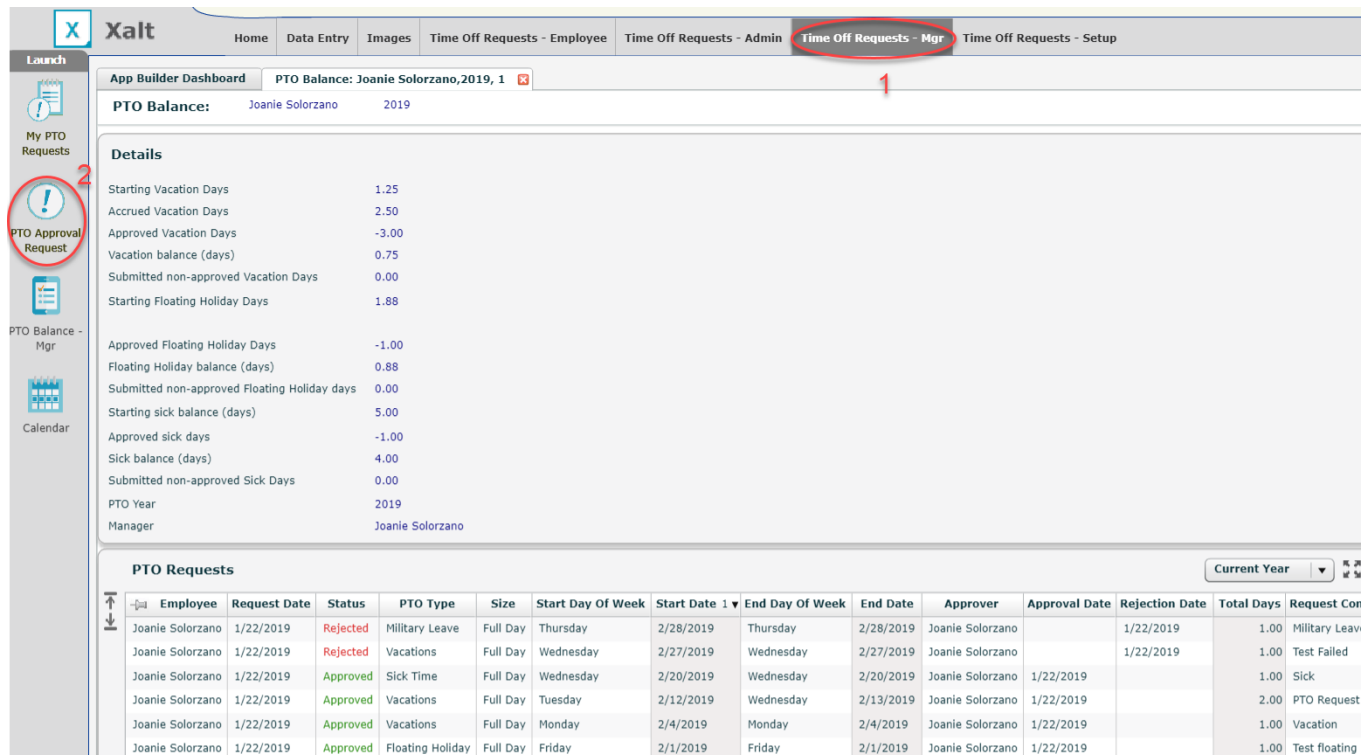


Figure 10: Manager PTO Request Summary

PTO APPROVAL REQUEST

The purpose of this launcher is so that the manager can view a list of pending PTO Request from subordinate employees. The manager can approve / deny vacation request. Once one of the subordinate employees creates a request it is automatically placed on this list. And once it has been approved / rejected it will be removed from this list. See Figure 11.

[illegible]

Figure 11: A list of submitted PTO requests are populated waiting for manager approval

PTO BALANCE - MGR

The purpose of this launcher is so that the manager can view a running balance of all their employees and their current balances of PTO categories. The manager is only able to see current employees assigned to them. See Figure 12.

Xalt

Home | Data Entry | Images | Time Off Requests - Employee | Time Off Requests - Admin | **Time Off Requests - Mgr** | Time Off Requests - Setup

Launch

My PTO Requests

PTO Approval Request

PTO Balance Mgr

Calendar

App Builder Dashboard | PTO Balance - Mgr

PTO Balance - Mgr

My Employees - current

PTO Year 1 ▼	Employee	Starting Vacation Days	Approved Vacation Days	Vacation balance (days)	Starting Holiday Days	Approved Holiday Days	Holiday balance (days)	Submitted non-approved
2019	David Newton	0.00	-6.00	-6.00	1.00	0.00	1.00	
2019	Joanie Solorzano	1.25	-3.00	0.75	1.88	-1.00	0.88	
2019	Kris Puuvada	1.25	0.00	5.00	1.88	0.00	1.88	
2019	Phil Joseph	0.00	0.00	0.00	0.00	0.00	0.00	
2019	Test 6	1.25	0.00	1.25	1.00	0.00	1.00	
2019	Test 7	1.25	0.00	1.25	1.00	0.00	1.00	

Figure 12: All assigned subordinate employees and their respective PTO balances.

CALENDAR

The purpose of this launcher is so that the manager can view what dates all their employees have already approved vacation time. This is important in case multiple employees request time off during the same day. This calendar will also show pay days and holidays. See Figure 13.

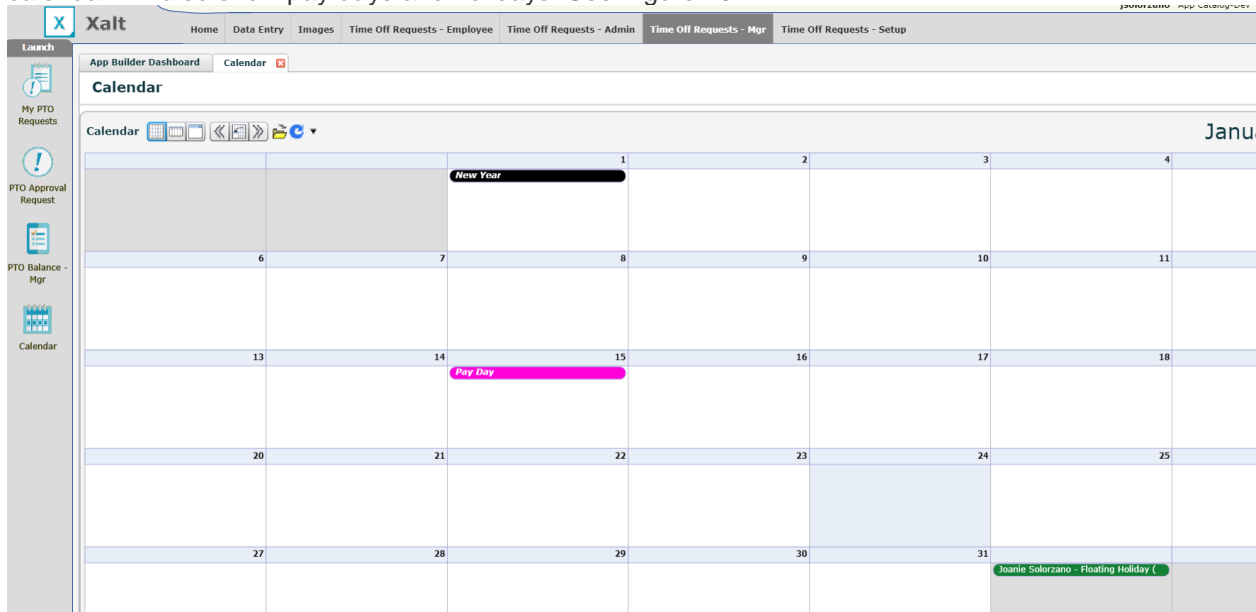


Figure 13: A list of approved PTO requests shown in calendar view

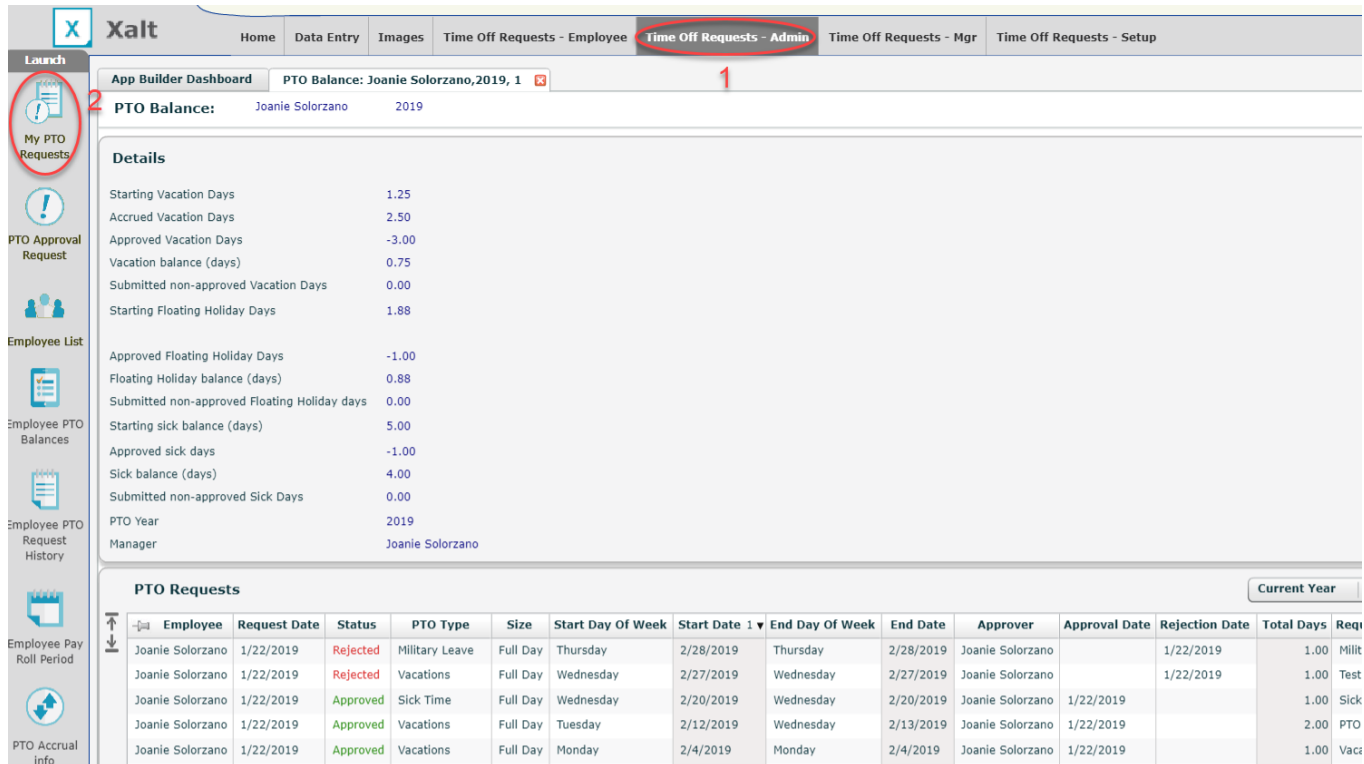
WORKBENCH: TIME OFF REQUEST - ADMIN

This workbench is used so that the admin has the ability view and modify information on every single employee. The admin is also required to input pay roll dates and run PTO accrual for every pay period.

LAUNCHERS

MY PTO REQUESTS

The purpose of this launcher is to view a running total of the admin user's time off request and existing balance. The admin user can create, update, cancel, or delete PTO request. See figure 14.



PTO Balance: Joanie Solorzano 2019

Details

Starting Vacation Days	1.25
Accrued Vacation Days	2.50
Approved Vacation Days	-3.00
Vacation balance (days)	0.75
Submitted non-approved Vacation Days	0.00
Starting Floating Holiday Days	1.88
Approved Floating Holiday Days	-1.00
Floating Holiday balance (days)	0.88
Submitted non-approved Floating Holiday days	0.00
Starting sick balance (days)	5.00
Approved sick days	-1.00
Sick balance (days)	4.00
Submitted non-approved Sick Days	0.00
PTO Year	2019
Manager	Joanie Solorzano

PTO Requests Current Year

Employee	Request Date	Status	PTO Type	Size	Start Day Of Week	Start Date	End Day Of Week	End Date	Approver	Approval Date	Rejection Date	Total Days	Request Type
Joanie Solorzano	1/22/2019	Rejected	Military Leave	Full Day	Thursday	2/28/2019	Thursday	2/28/2019	Joanie Solorzano		1/22/2019	1.00	Milit
Joanie Solorzano	1/22/2019	Rejected	Vacations	Full Day	Wednesday	2/27/2019	Wednesday	2/27/2019	Joanie Solorzano		1/22/2019	1.00	Test
Joanie Solorzano	1/22/2019	Approved	Sick Time	Full Day	Wednesday	2/20/2019	Wednesday	2/20/2019	Joanie Solorzano	1/22/2019		1.00	Sick
Joanie Solorzano	1/22/2019	Approved	Vacations	Full Day	Tuesday	2/12/2019	Wednesday	2/13/2019	Joanie Solorzano	1/22/2019		2.00	PTO
Joanie Solorzano	1/22/2019	Approved	Vacations	Full Day	Monday	2/4/2019	Monday	2/4/2019	Joanie Solorzano	1/22/2019		1.00	Vaca

Figure 14: PTO Request Summary and PTO balances for the admin user

PTO APPROVAL REQUEST

The purpose of this launcher is so that the admin can view a list of pending vacation request for every employee. The admin can approve / deny vacation any request from employees. See figure 15.

[illegible]

Figure 15: A list of submitted PTO requests for all employees are populated in this list

EMPLOYEE LIST

The purpose of this launcher is to create, delete, and update records for a new employee. Once selected the admin will see a list of employees already created. From this launcher, new employee records can be created using the menu or toolbar. It will require a list of information concerning the employee. After the employee information is entered, the admin will be prompted to assign the accrual rate for each employee and the effective dates for this rate. Lastly an accrual rate will be assigned to the employee. This record is required to manage a history of the employee's vacation request. See Figure 16



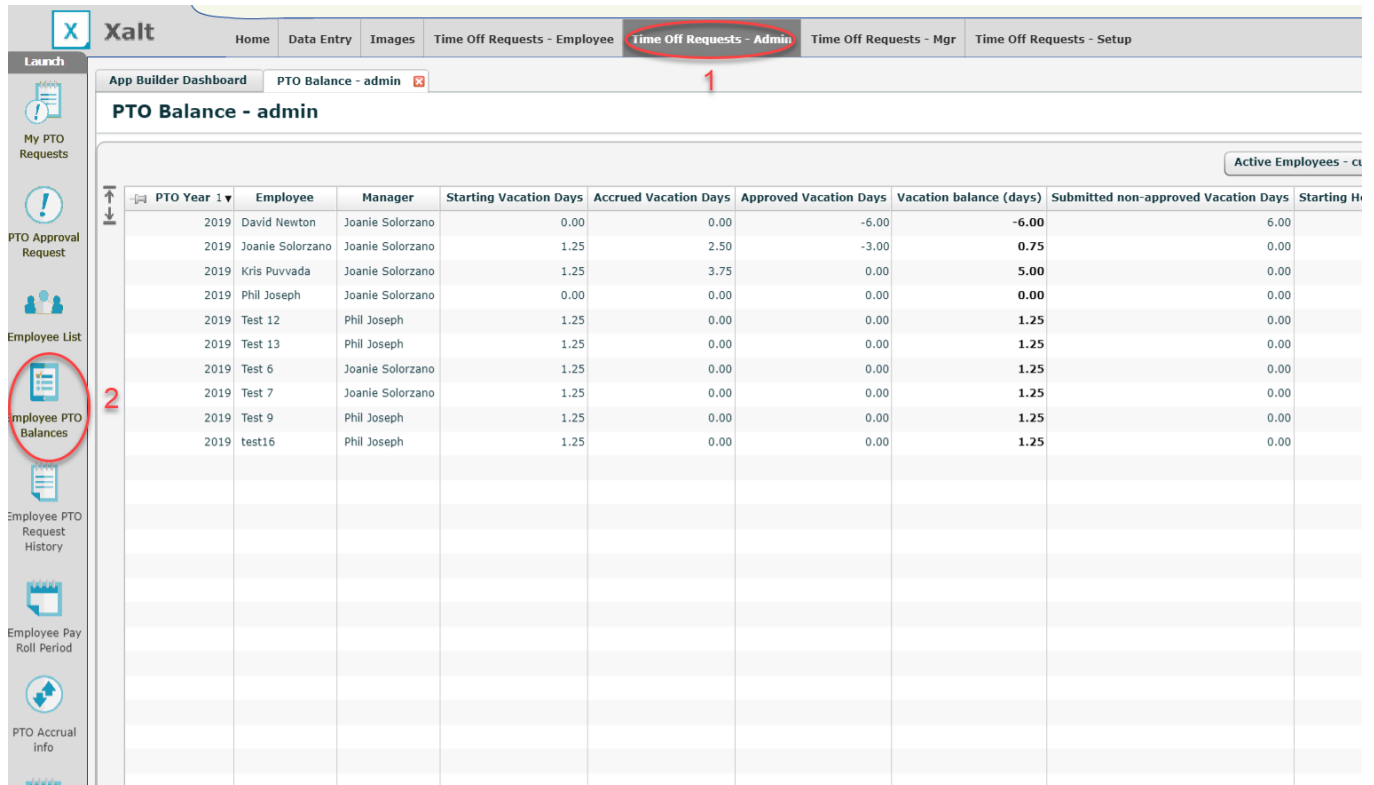
The screenshot shows the Xalt application interface. The top navigation bar includes tabs for Home, Data Entry, Images, Time Off Requests - Employee, Time Off Requests - Admin (highlighted with a red circle and labeled '1'), Time Off Requests - Mgr, and Time Off Requests - Setup. The left sidebar contains a 'Launch' section with icons for My PTO Requests, PTO Approval Request, Employee List (highlighted with a red circle and labeled '2'), Employee PTO Balances, Employee PTO Request History, Employee Pay Roll Period, and PTO Accrual. The main content area displays the 'Employees' table with the following columns: Resource ID, User, Email, Manager, Internal, Employee Type, Employee Role, Employee ID, Full Time, and Manager/Approver. The table contains 17 rows of employee data.

Resource ID	User	Email	Manager	Internal	Employee Type	Employee Role	Employee ID	Full Time	Manager/Approver
1	Joanie Solorzano	joanie.solorzano@hexagon.com	Yes	Yes	Hexagon Services	Developer	1	Yes	Joanie Solorzano
2	Kris Puvvada	kris.puvvada@hexagon.com	No	Yes	Contractor	Developer	2	Yes	Joanie Solorzano
3	Test Employee	test.employee@hexagon.com	No	Yes	Hexagon Services	Developer	3	Yes	Joanie Solorzano
4	Test Empl	test.empl@hexagon.com	No	Yes	Contractor	Developer	4	Yes	Joanie Solorzano
5	Test 5	test.5@hexagon.com	No	Yes	Hexagon Services	Developer	5	Yes	Joanie Solorzano
6	Test 6	test.6@hexagon.com	No	Yes	Contractor	Developer	6	Yes	Joanie Solorzano
7	Test 7	test.7@hexagon.com	No	Yes	Hexagon Services	Developer	7	Yes	Joanie Solorzano
8	Phil Joseph	phil.joseph@hexagon.com	Yes	Yes	Hexagon Services	Developer	8	Yes	Joanie Solorzano
9	Test 9	test.9@hexagon.com	No	Yes	Contractor	Developer	9	Yes	Phil Joseph
10	Test 10	test.10@gamil.com	No	Yes	Hexagon Services	Developer	10	Yes	Phil Joseph
11	Test 11	test.11@hexagon.com	No	Yes	Hexagon Services	Developer	11	Yes	Phil Joseph
12	Test 12	test.12@hexagon.com	No	Yes	Hexagon Services	Developer	12	Yes	Phil Joseph
13	Test 13	test.13@hexagon.com	No	Yes	Hexagon Services	Developer	13	Yes	Phil Joseph
15	David Newton	david.newton@hexagon.com	No	Yes	Hexagon Services	Developer	14	Yes	Joanie Solorzano
16	test16	test.16@hexagon.com	No	Yes	Hexagon Services	Developer	16	Yes	Phil Joseph
17	Test 17	test.17@hexagon.com	No	Yes	Contractor	Developer	17	Yes	Phil Joseph

Figure 16: Creating employee records in the employee record list

EMPLOYEE PTO BALANCES

The purpose of this launcher is so that the admin can view a running balance of all employees and current balance concerning vacation time. The admin can see all employees balance information. See figure 17

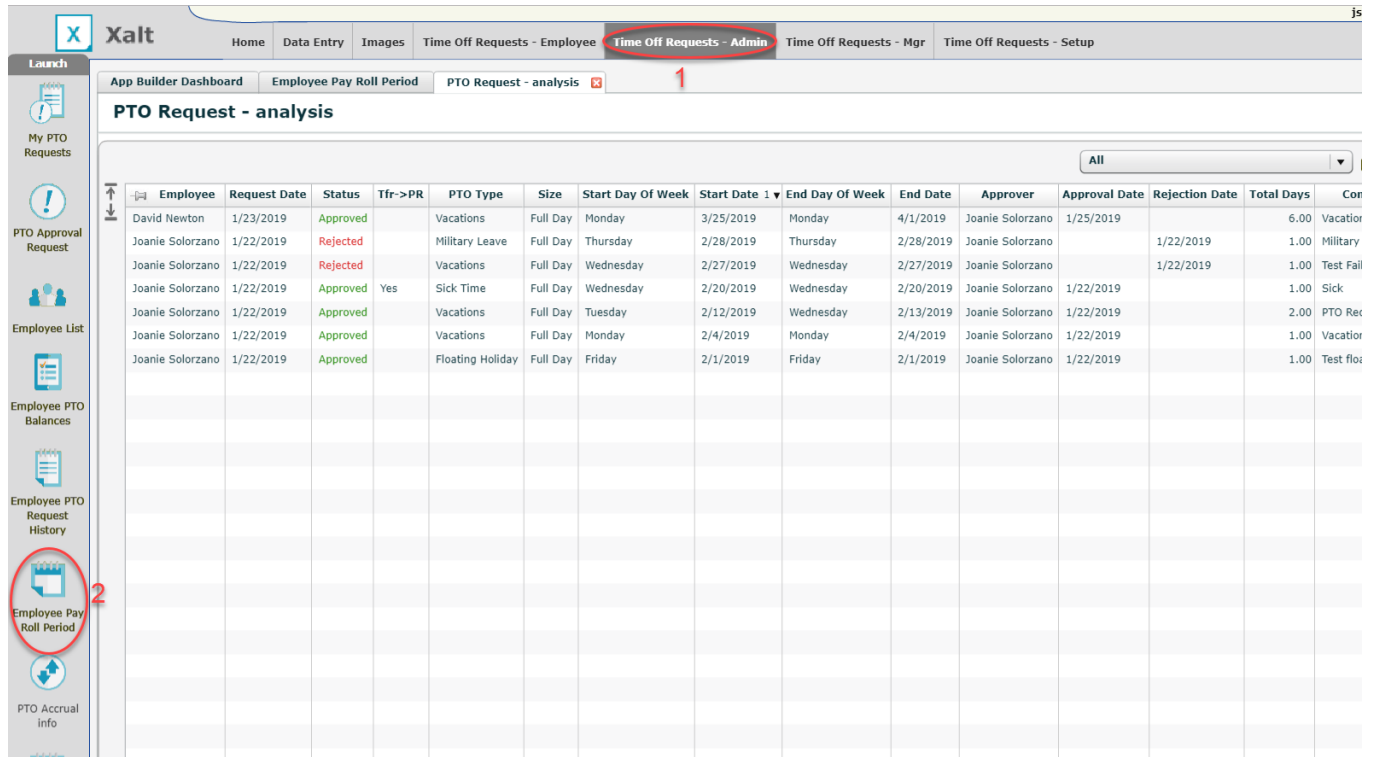


PTO Year	Employee	Manager	Starting Vacation Days	Accrued Vacation Days	Approved Vacation Days	Vacation balance (days)	Submitted non-approved Vacation Days	Starting H
2019	David Newton	Joanie Solorzano	0.00	0.00	-6.00	-6.00	6.00	
2019	Joanie Solorzano	Joanie Solorzano	1.25	2.50	-3.00	0.75	0.00	
2019	Kris Puvvada	Joanie Solorzano	1.25	3.75	0.00	5.00	0.00	
2019	Phil Joseph	Joanie Solorzano	0.00	0.00	0.00	0.00	0.00	
2019	Test 12	Phil Joseph	1.25	0.00	0.00	1.25	0.00	
2019	Test 13	Phil Joseph	1.25	0.00	0.00	1.25	0.00	
2019	Test 6	Joanie Solorzano	1.25	0.00	0.00	1.25	0.00	
2019	Test 7	Joanie Solorzano	1.25	0.00	0.00	1.25	0.00	
2019	Test 9	Phil Joseph	1.25	0.00	0.00	1.25	0.00	
2019	test16	Phil Joseph	1.25	0.00	0.00	1.25	0.00	

Figure 17: All assigned subordinate employees and their respective PTO balances

EMPLOYEE PTO REQUEST HISTORY

The purpose of this launcher is so that the admin can view all submitted PTO requests. The admin also can view a summary of taken PTO during a certain time. The admin can also mark a request as “transferred to payroll”. Once something has been moved to pay roll it will be marked as Yes. This is good for tracking purposes. See Figure 18.



Time Off Requests - Admin

PTO Request - analysis

Employee	Request Date	Status	Tfr->PR	PTO Type	Size	Start Day Of Week	Start Date	End Day Of Week	End Date	Approver	Approval Date	Rejection Date	Total Days	Comments
David Newton	1/23/2019	Approved		Vacations	Full Day	Monday	3/25/2019	Monday	4/1/2019	Joanie Solorzano	1/25/2019		6.00	Vacation
Joanie Solorzano	1/22/2019	Rejected		Military Leave	Full Day	Thursday	2/28/2019	Thursday	2/28/2019	Joanie Solorzano		1/22/2019	1.00	Military
Joanie Solorzano	1/22/2019	Rejected		Vacations	Full Day	Wednesday	2/27/2019	Wednesday	2/27/2019	Joanie Solorzano		1/22/2019	1.00	Test Fail
Joanie Solorzano	1/22/2019	Approved	Yes	Sick Time	Full Day	Wednesday	2/20/2019	Wednesday	2/20/2019	Joanie Solorzano	1/22/2019		1.00	Sick
Joanie Solorzano	1/22/2019	Approved		Vacations	Full Day	Tuesday	2/12/2019	Wednesday	2/13/2019	Joanie Solorzano	1/22/2019		2.00	PTO Ret
Joanie Solorzano	1/22/2019	Approved		Vacations	Full Day	Monday	2/4/2019	Monday	2/4/2019	Joanie Solorzano	1/22/2019		1.00	Vacation
Joanie Solorzano	1/22/2019	Approved		Floating Holiday	Full Day	Friday	2/1/2019	Friday	2/1/2019	Joanie Solorzano	1/22/2019		1.00	Test flo

Figure 18: All assigned subordinate employees and their respective PTO balances

EMPLOYEE PAY ROLL PERIOD

The purpose of this launcher is so that the admin can manage pay roll dates. The admin is required to input the pay roll dates for the year. See Figure 19.

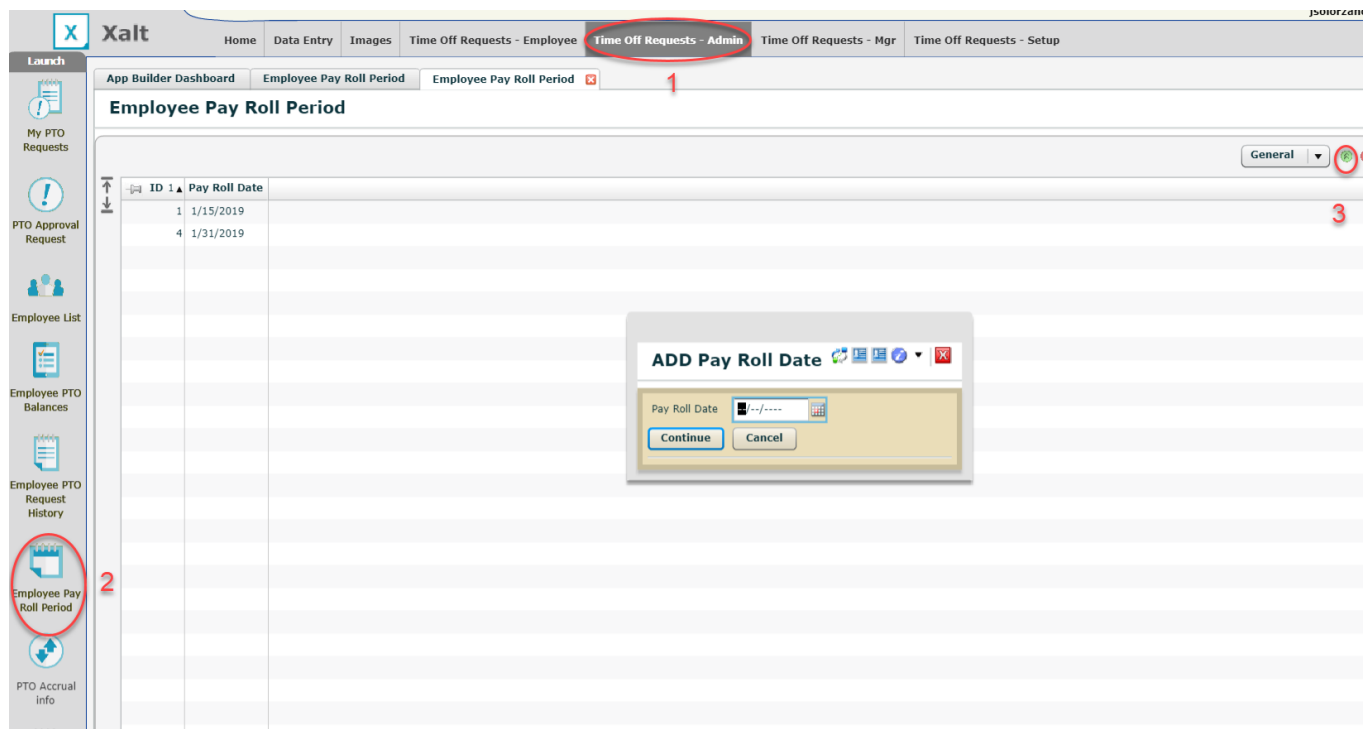
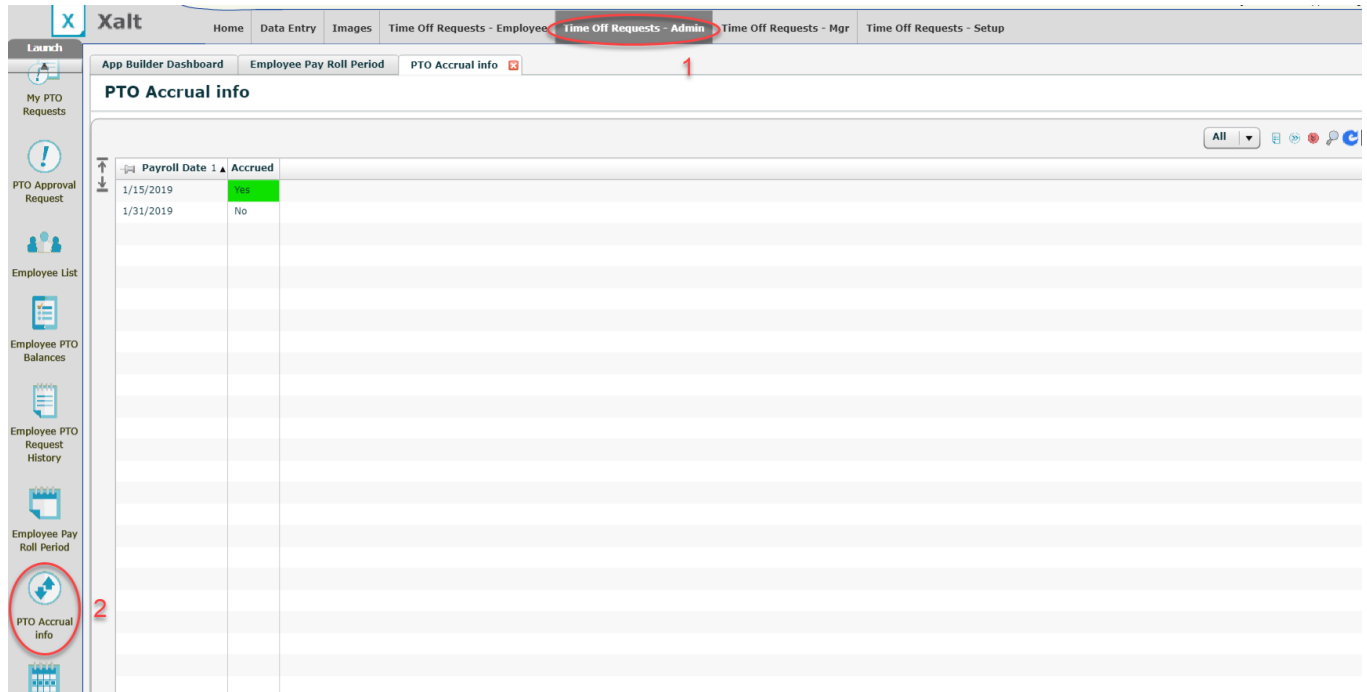


Figure 18: Setting pay roll periods

PTO ACCRUAL INFO

The purpose of this launcher is so that the admin can run the accrued vacation time per pay period for every employee. This is important because it adds vacation time to every employee. These records are created from the Employee Pay Roll Period launcher. See Figure 19.



The screenshot displays the Xalt application interface. The top navigation bar includes tabs for Home, Data Entry, Images, Time Off Requests - Employee, **Time Off Requests - Admin** (circled in red with a '1'), Time Off Requests - Mgr, and Time Off Requests - Setup. The left sidebar contains a 'Launch' section with icons for My PTO Requests, PTO Approval Request, Employee List, Employee PTO Balances, Employee PTO Request History, Employee Pay Roll Period, and **PTO Accrual info** (circled in red with a '2'). The main content area is titled 'PTO Accrual info' and contains a table with the following data:

Payroll Date	Accrued
1/15/2019	Yes
1/31/2019	No

Figure 19: Identifies whether or not PTO was accrued for the pay period

CALENDAR

The purpose of this launcher is so that the admin can view what dates all employees have already approved vacation time. This is important in case multiple employees request time off during the same day. This calendar will also show pay days and holidays. See Figure 2

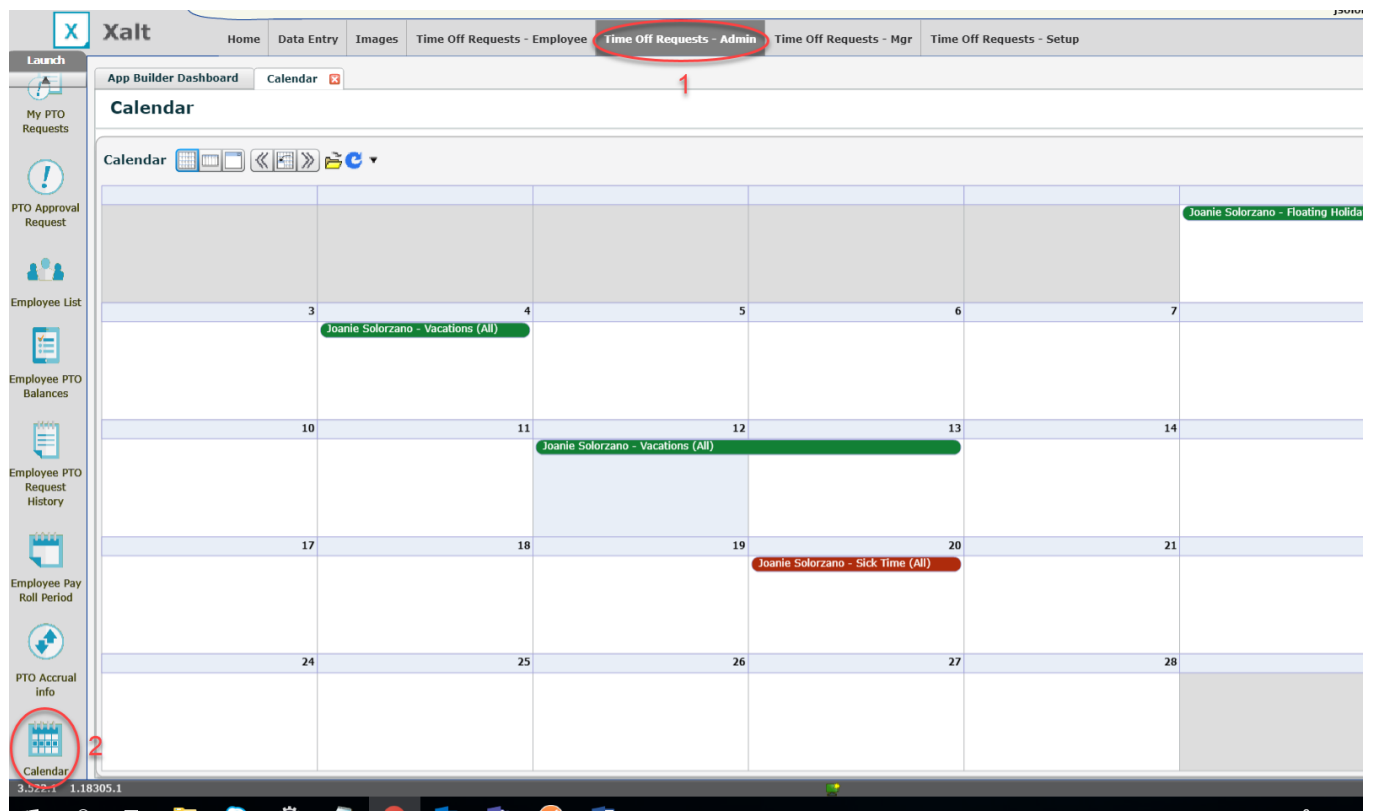


Figure 13: A list of approved PTO requests shown in calendar view