iFlow

User guide

Team Leaders

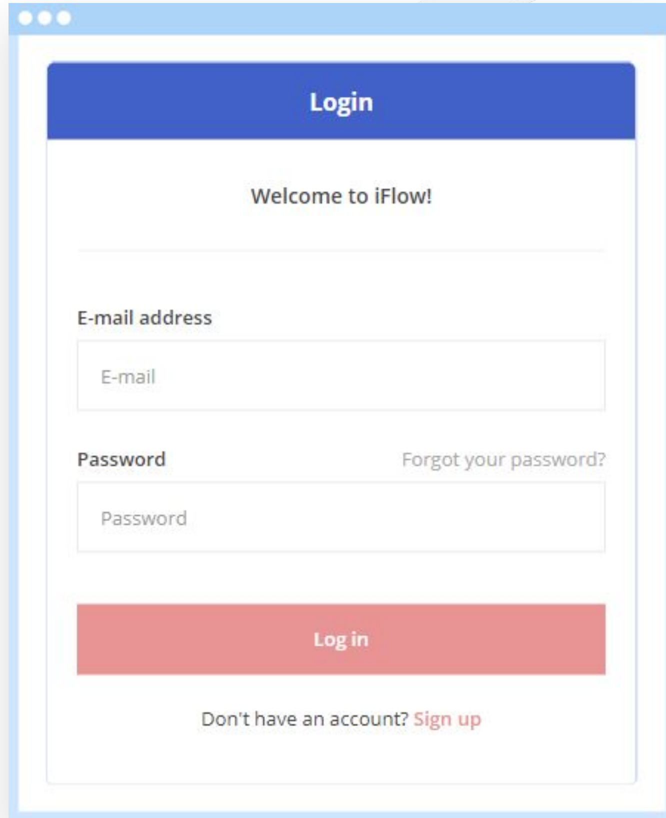
Read more

How do you log in?

The iFlow app can be used from any device with internet connection.

Follow these steps to log in:

- Enter www.iflow.ro/en
- Click on ”Login”
- Fill in with the credentials received from the admin (e-mail and password)
- Click on ”Log in”

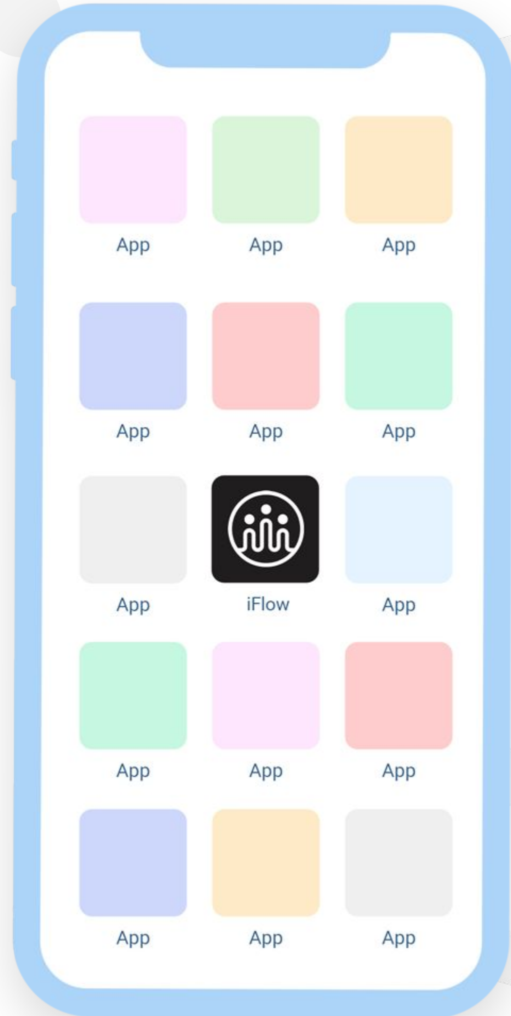


How do you create a shortcut for iFlow?

The easiest way to access the app from your phone is to create a shortcut of the website on your device.

How can you do that?

- Access www.iflow.ro/en
- Click on the ”Settings” menu of the browser
- Select ”Add on homescreen”



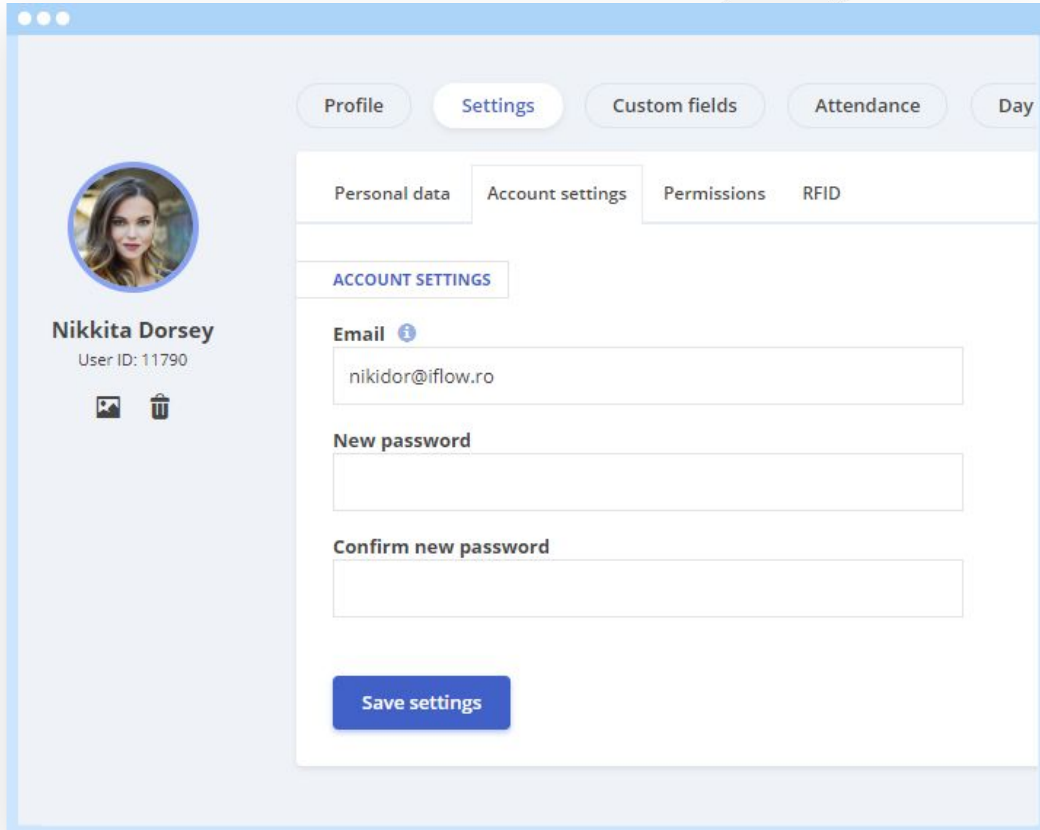
How do you change your password?

After you entered your account for the first time, you will want to change your password.

Follow these steps:

- Access your profile
- Click on "Settings"
- Click on the "Account settings" tab
- Write the old password and the new one
- Click on "Save settings"

**The password must include at least 8 characters, one letter, one number and one symbol.*

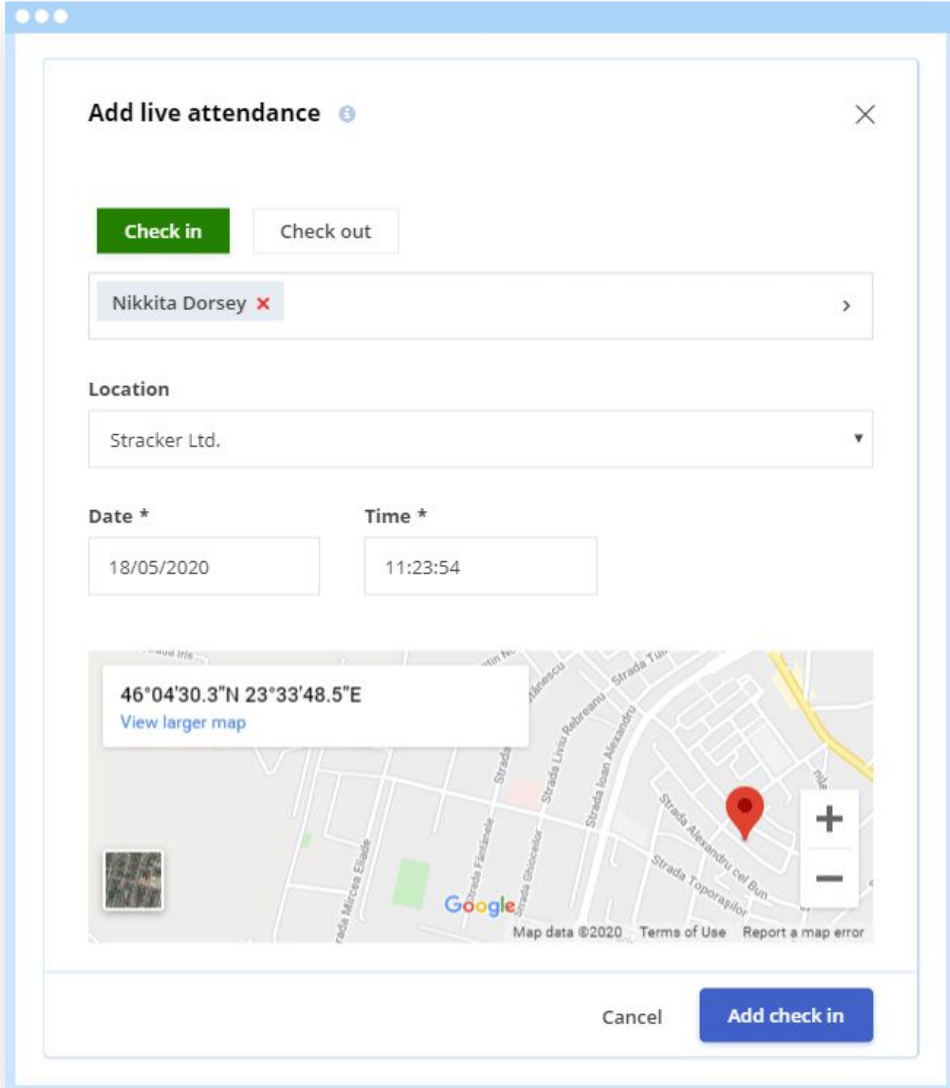


How do you check-in?

How do I check-in:

- From Dashboard
- Click on "Check in"
- Choose the location
  **If you are required to by your admin*
- Check the date and time
- Click on "Add check in"

**To check out, follow the same steps as described above, after pressing the "Check out" button*

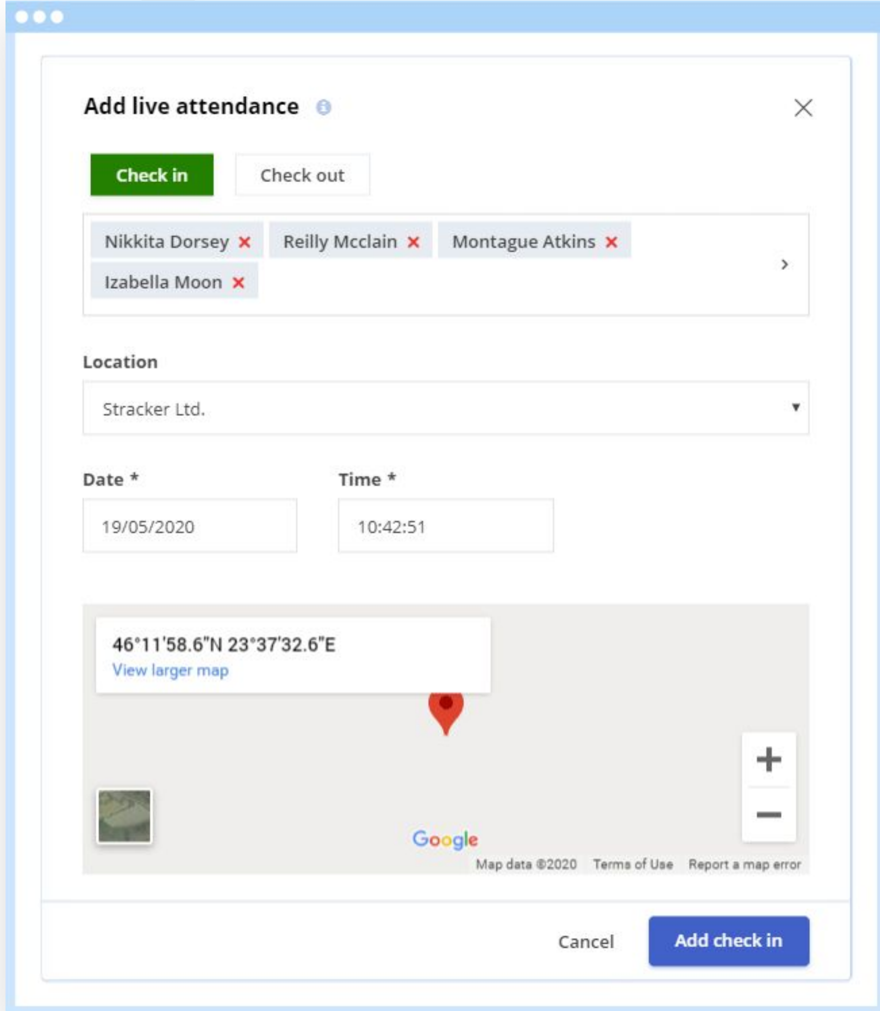


How do you check-in/out other employees?

How do you check-in/out:

- From Dashboard
- Click on "Check in"/"Check out"
- Select the employees
- Choose the location
  **If you are required to by your admin*
- Check the date and time
- Click on "Add check in"

**When you are checking-in/out multiple employees at the same time, all of them will be registered by the app at the same location, date and time.*

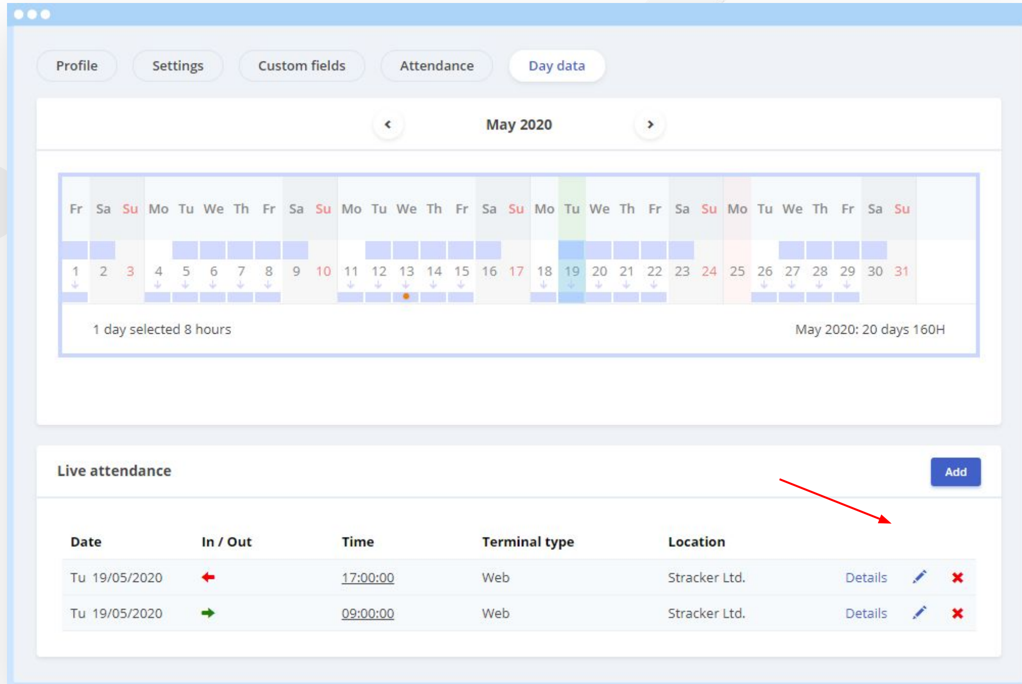


How do you edit or delete a check-in/out?

If there are any errors in your check-in/out:

- From Dashboard
- Click on the day of for the employee you want to edit/delete
- In the Day data panel from the employee's profile you can edit or delete

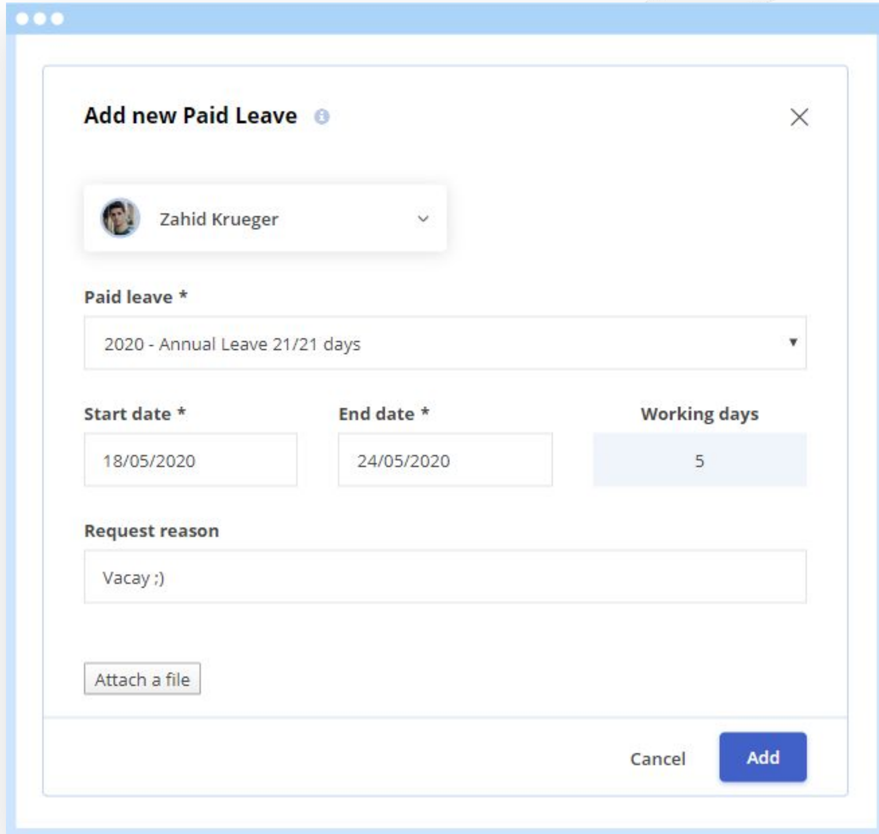
**You will be able to edit or delete any of the day data, only if the admin will give you permission.*



How do you add events for yourself?

- From Dashboard
- Click on ”Add events”
- Choose the event
- Fill in the necessary information: date, time, reason, etc.
- To save click on “Add”

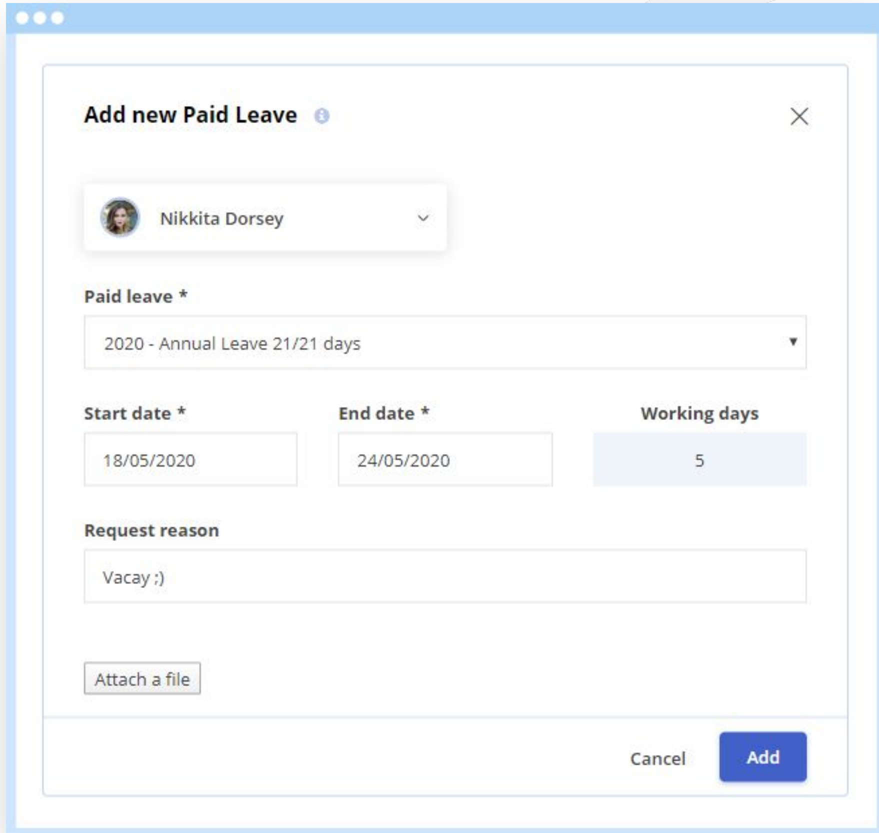
**If you made a mistake while adding the information, you can edit/delete them while the event is still pending (waiting for approval). Afterward, for any change you will need to make a request to receive permission to edit it.*



How do you add events for other employees?

- From Dashboard
- Click on ”Add events”
- Choose the event
- Choose the employee/employees
- Fill in the necessary information: date, time, reason, etc.
- To save click on “Add”

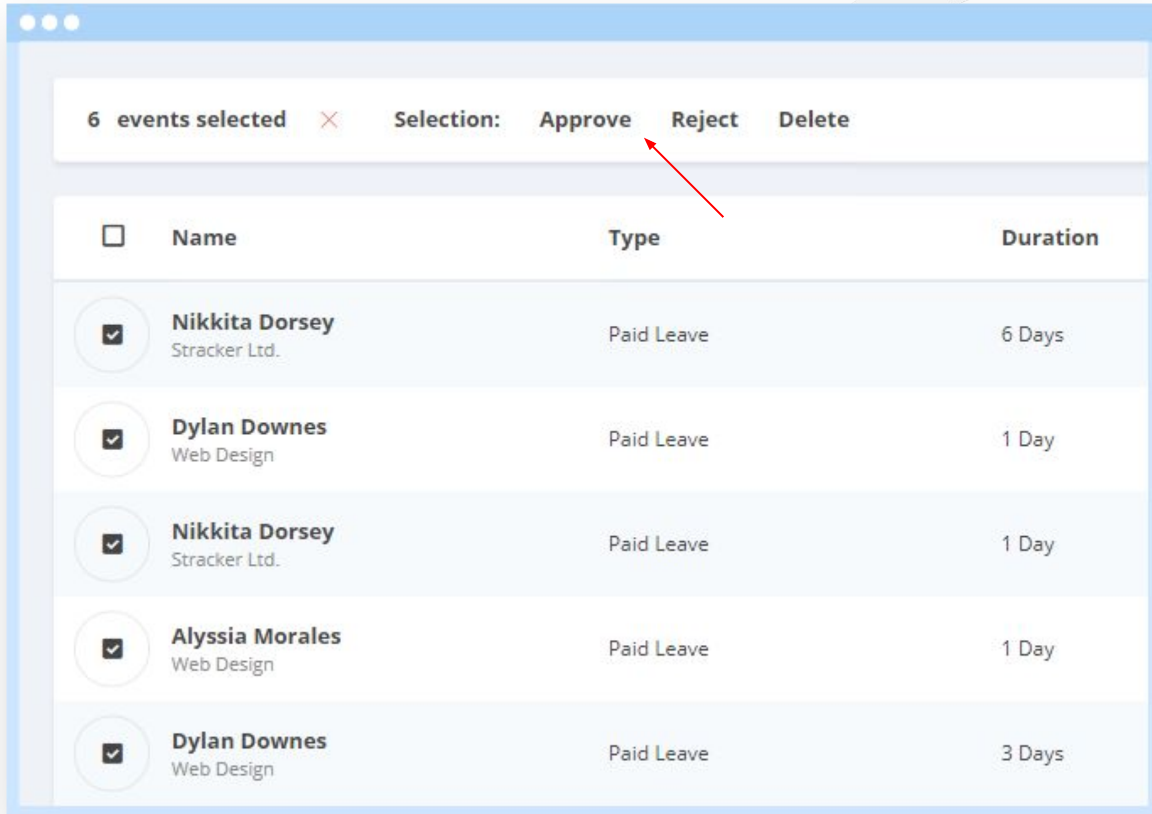
**If you added wrong information, you can edit/delete it at any time for the employees that are part of your team.*



How do you approve events for employees?

- From Dashboard
- Select “Activity” from the main menu
- Select the events that are waiting approval
- Click on “Approve” or “Reject”

**In the Activity menu you can use filters to approve or reject events.*

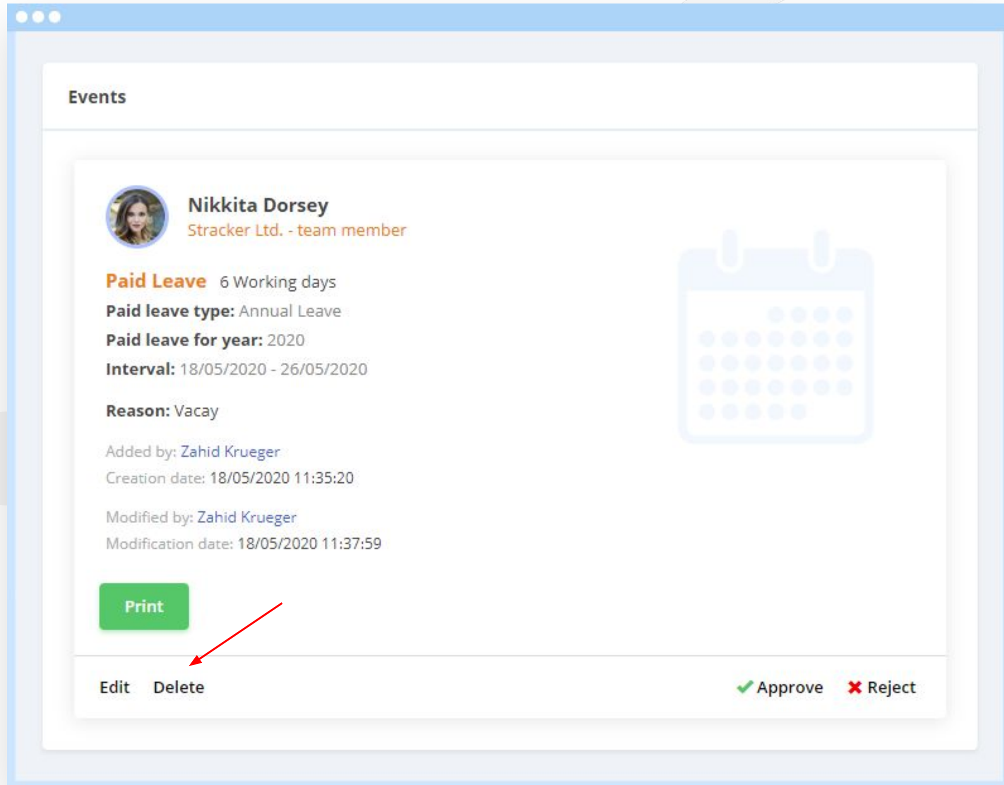


How do you edit an event?

To edit an unapproved event:

- From Dashboard
- Click on the day of the event
- In the “Events” panel click on “Edit” or “Delete”
- Make the changes and click on “Save”

**You can edit/delete events for your team members, even after the event was approved.*

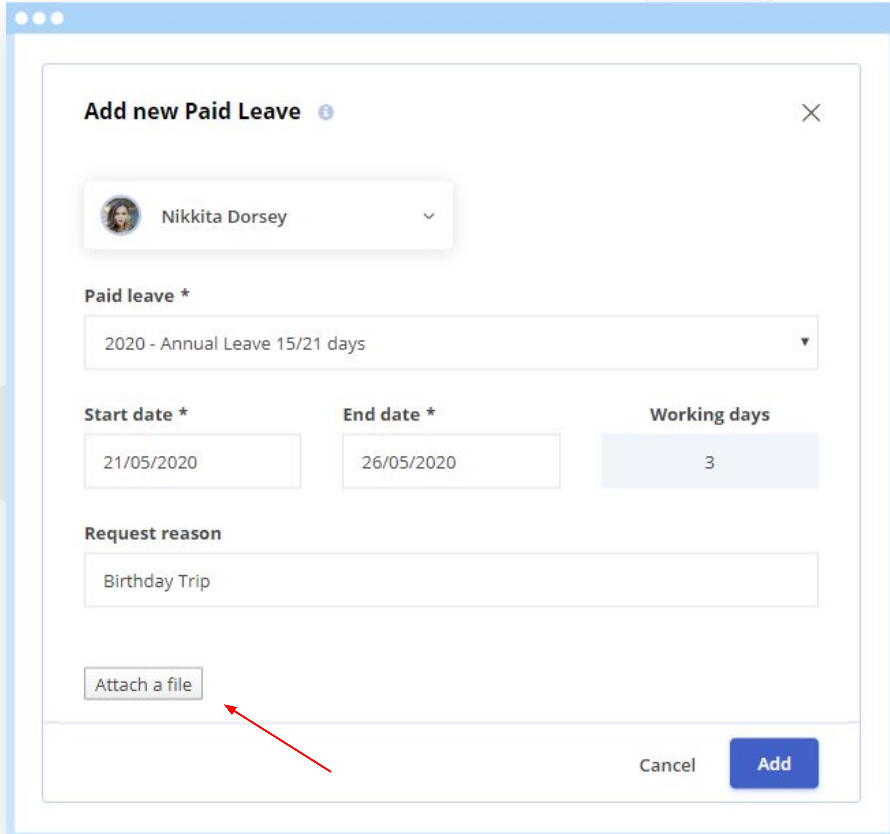


How do you **upload files** in iFlow?

You can upload files in iFlow when you add events.

For example, you want to add a sick leave:

- Click on “Add event”
- Select “Sick leave”
- Select the employee
- Select the leave type and the duration
- Click on “Attach file”, choose the file from your device
- Click on “Add”

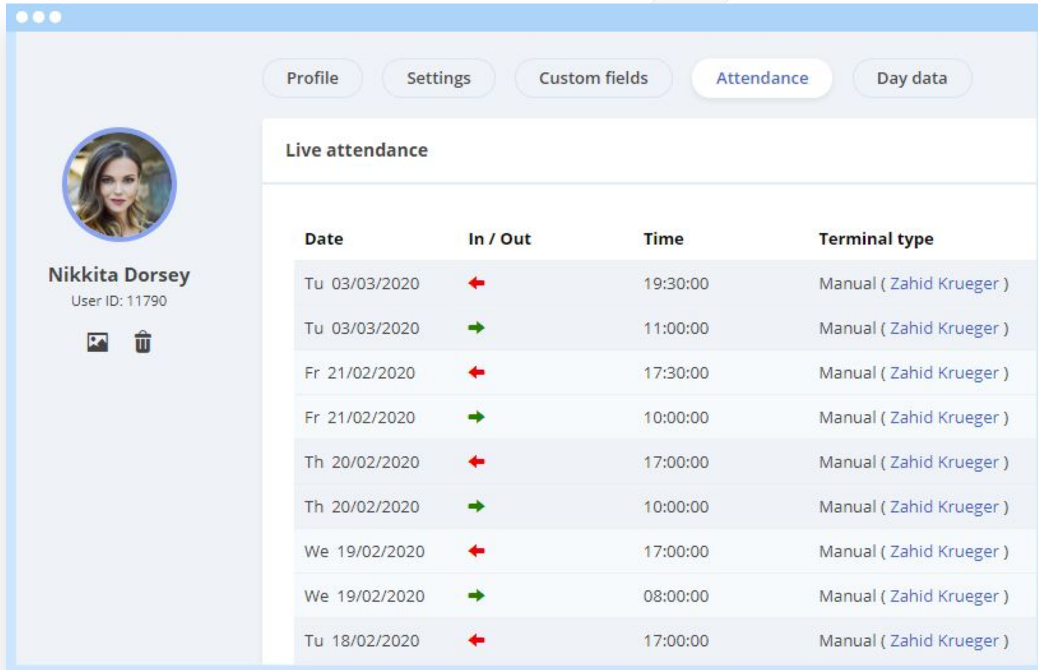


Where do you check the attendance?

You can see in real time, daily,
the attendance of the employees:

- Real attendance report
- Real registry report
- Timesheet

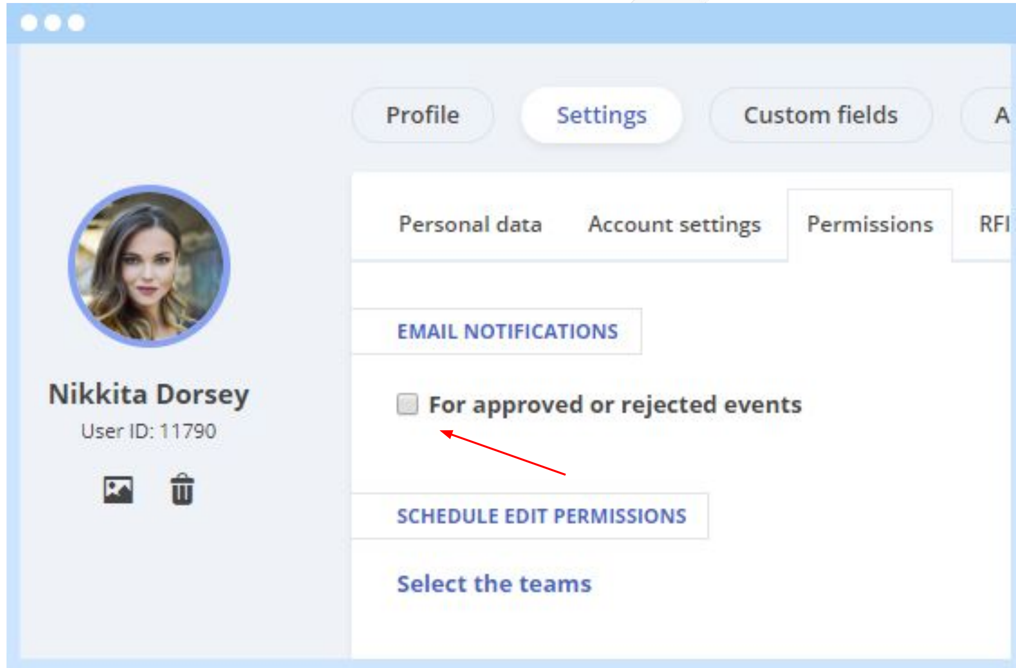
**Or individually on each employee's profile.*



How do you activate e-mail notifications?

Follow these steps, if you want to receive notifications when your events are approved or rejected:

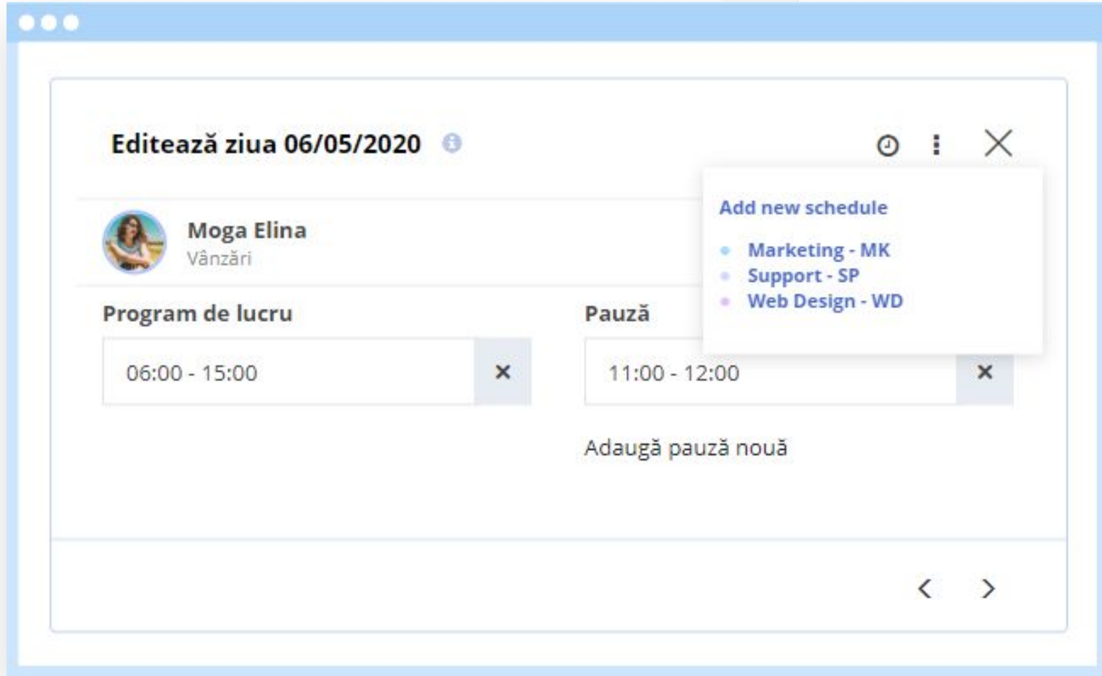
- Access your profile
- Click on “Settings”
- Click on “ Permissions”
- Check the box for email notifications
- Click on “Save settings”



How do you set a work schedule for employees?

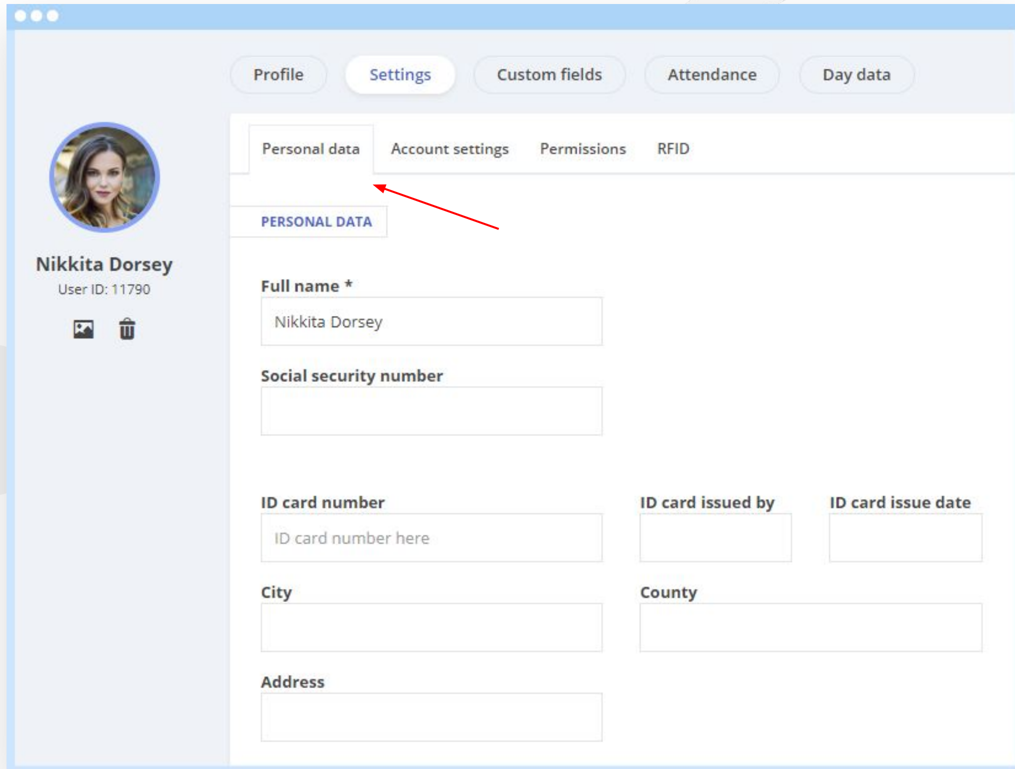
- From the “Work schedule” panel
- Double click on a day, fill in the time interval and the break
- Copy the work schedule for all the employees that share the same schedule
- Or right click to choose one of the predefined work shifts

**You can create any type of work schedule with any time interval.*
**Predefined work shifts are created by the admin.*



How do you fill in personal data of the employees?

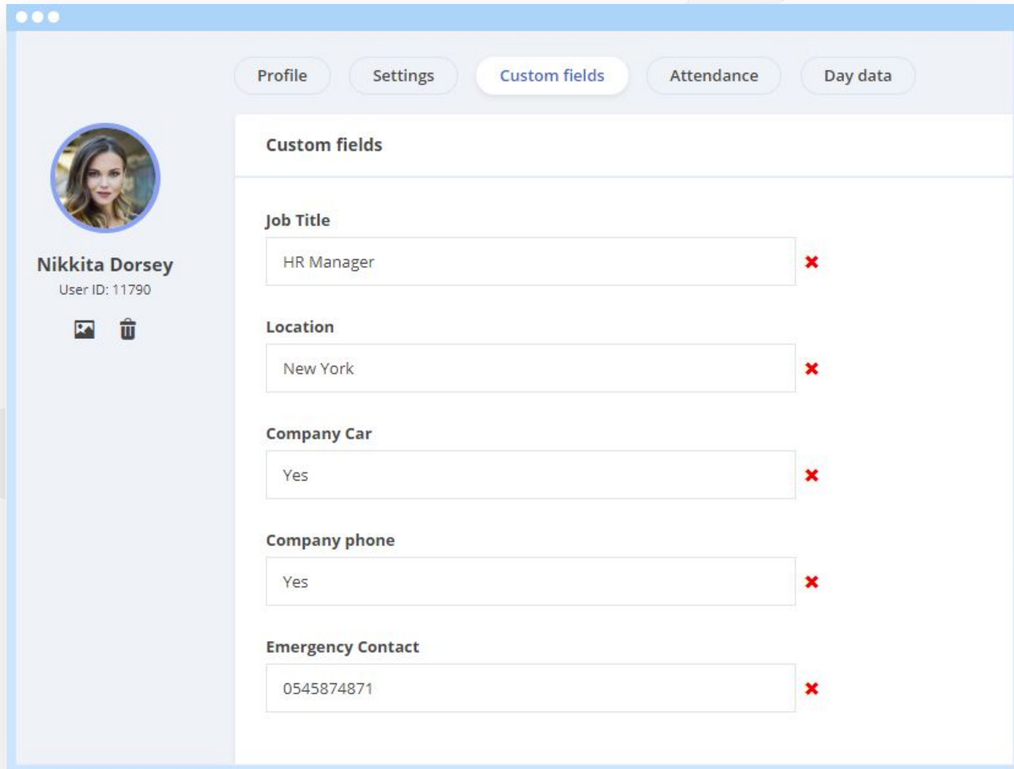
- From Dashboard
- Click on the employee's name
- From his profile, click on "Settings"
- Fill in the data
- To save click on "Save settings"



How do you **fill in the custom fields** of the employees?

- From Dashboard
- Click on the employee’s name
- From his profile, click on “Custom fields”
- Fill in the data
- To save click on “Update”

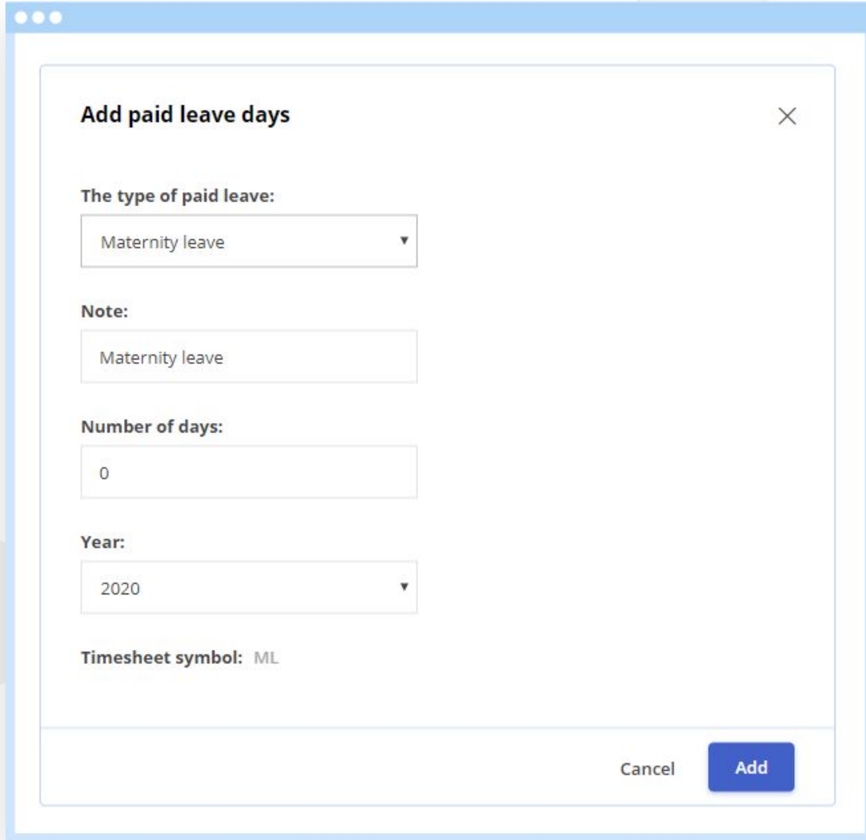
**Custom fields are created by the admin.*



How do you set available paid leave days for employees?

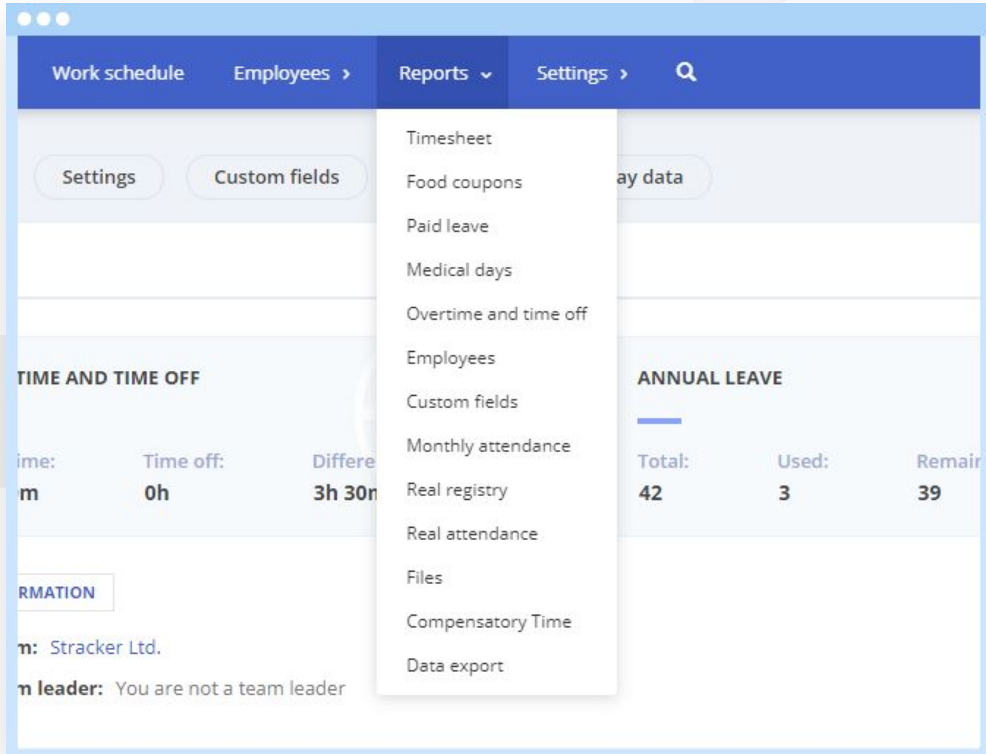
- From Dashboard
- Click on the employee you need
- At the “Paid leave days” section, click on “Add”
- Select the type of paid leave
- Fill in the number of days
- Select the year
- To save click on “Add”

**Paid leave types are created by the admin.*



How do you access reports?

- As a team leader you have access to all the reports, and you can filter them by teams.
- From the main menu, click on “Reports”
- Select any report from the list
- You can download or print them at any time



How do you print documents?

From the employee's profile:

- Click on the document from the Documents list
- Click on "Print" / "Download Word.docx"

From the Activity menu:

- Click on the event for which you want to print/download the document
- Click on "Print"
- Click on "Print" / "Download Word.docx"