iFlow

User guide

Team Leaders

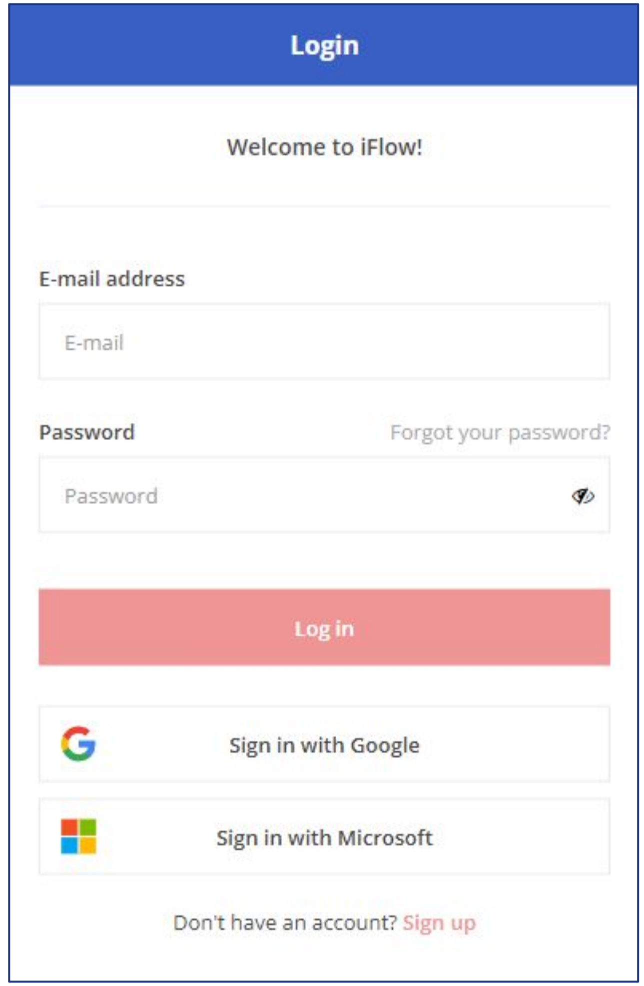
How do you log in?

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”

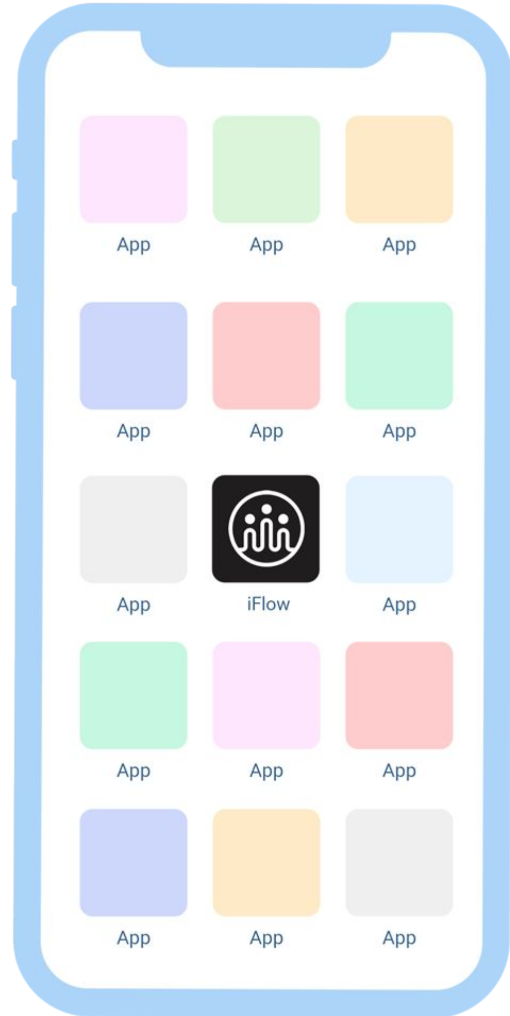
*Also, you can log in to the app with your Google or Microsoft account
*To recover a forgotten password, click on "Forgot password"



How to download the iFlow application?

The iFlow app can be downloaded for the following versions:

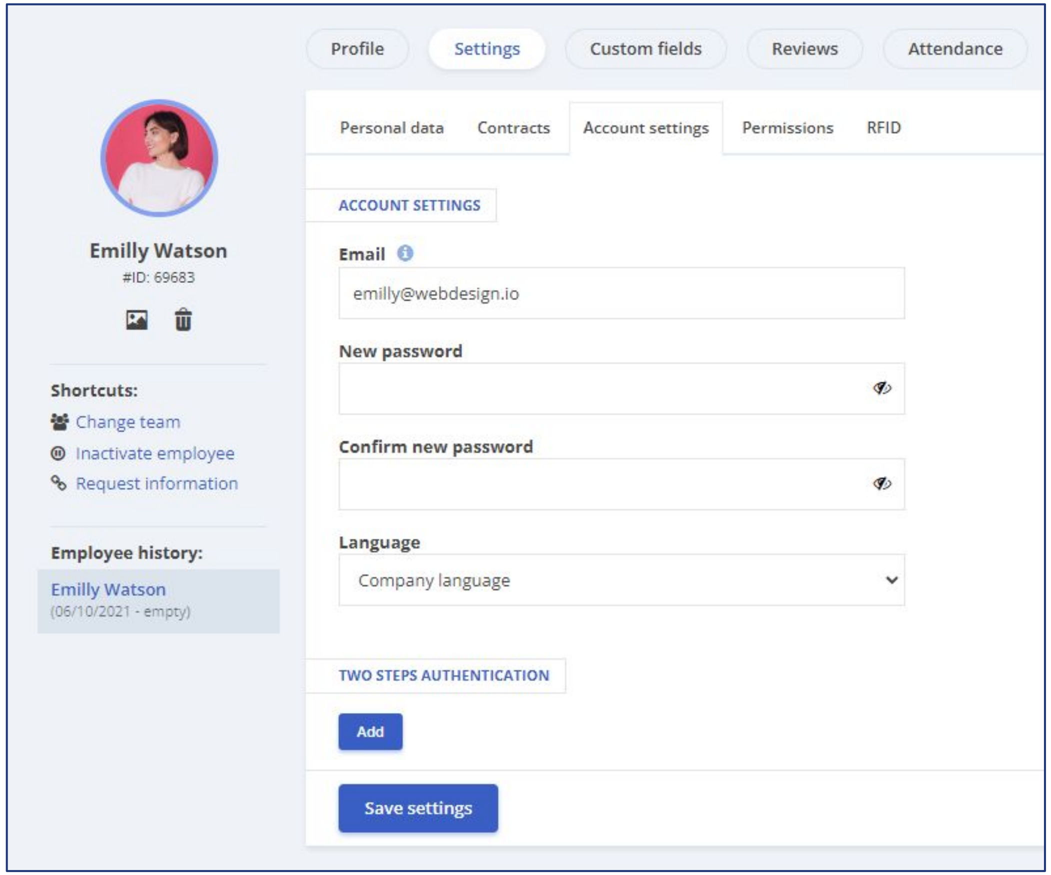
- iFlow for iOS from the App Store
- iFlow for Android from Google Play
- iFlow for desktop



How do you change your password?

After logging in to your account for the first time, you will surely want to change your password. You can do this as follows:

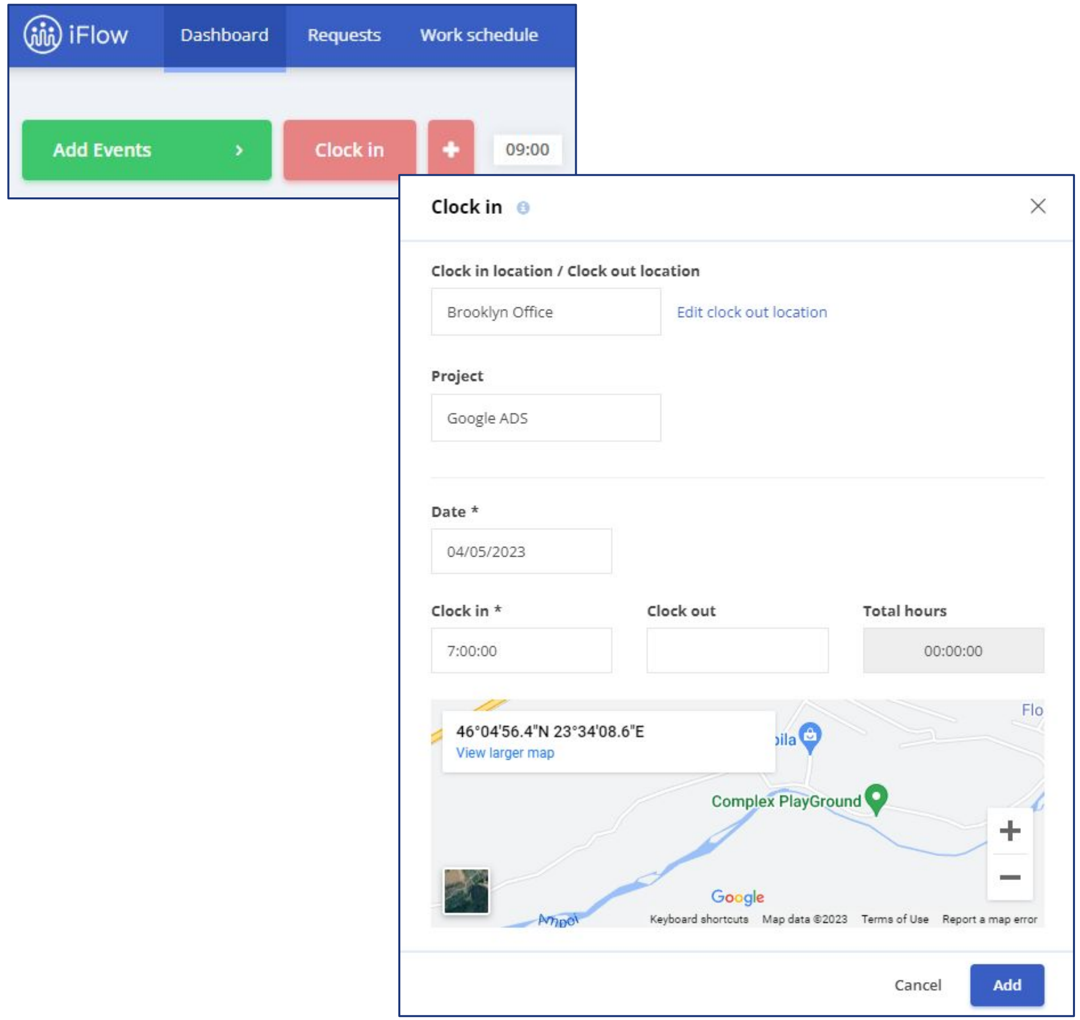
- Access your profile
- Click on "Settings"
- Click on the "Account Settings" tab
- Enter your old and new password
- Then click on "Save Settings"



How do you clock in?

How to register an entry/exit:

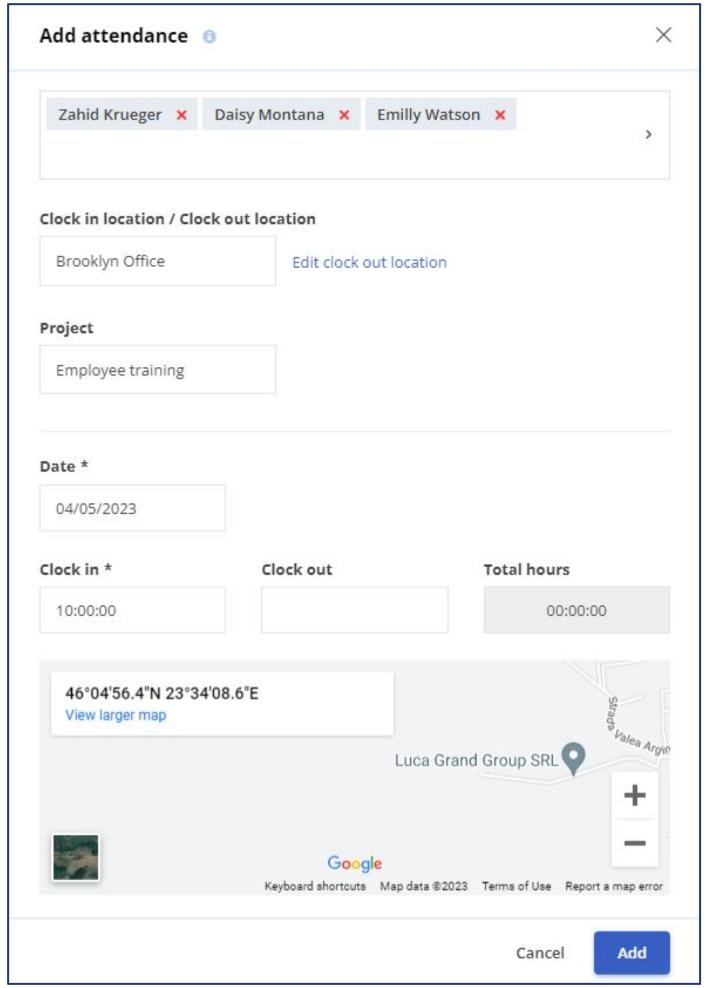
- From the dashboard
- Click on the "Clock in" button
- Select the location (if asked to do so by the Admin)
- Select the project you are working on for the current day
- Click on "Add"



How do you clock in other employees?

- From the dashboard
- Click on "+" - "Add Attendance" / "Close Attendance"
- Select the employees
- Select the location (if required)
- Select the project
- Click on "Add"

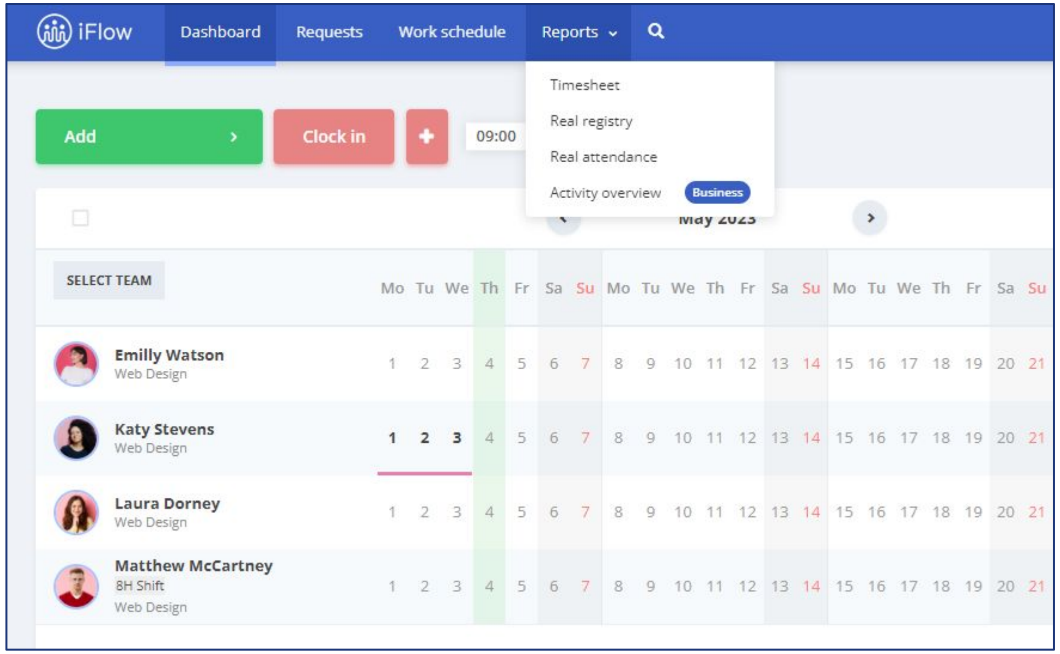
*When adding actual attendance for multiple employees simultaneously, the exact location, date, and time will be recorded for all selected employees.



How do you check the attendance of employees?

The attendance of employees can be checked using several reports available in the app. These are:

- Timesheet
- Real registry
- Real attendance
- Activity overview



To access these reports, click on "Reports" in the main menu.

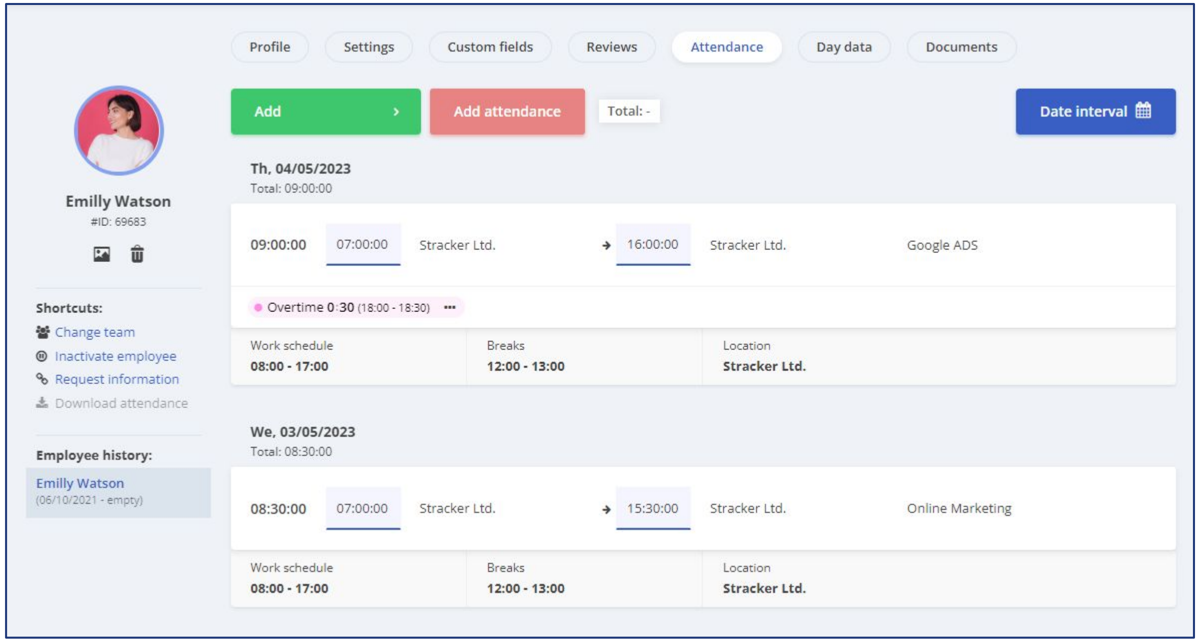
How do you check the attendance from the employee profile?

- Enter the employee's profile
- Click on "Attendance"

Here you will find data such as the clock-in and clock-out time, the project the employee worked on, and the location from where they clocked in.

To check attendance for a specific period:

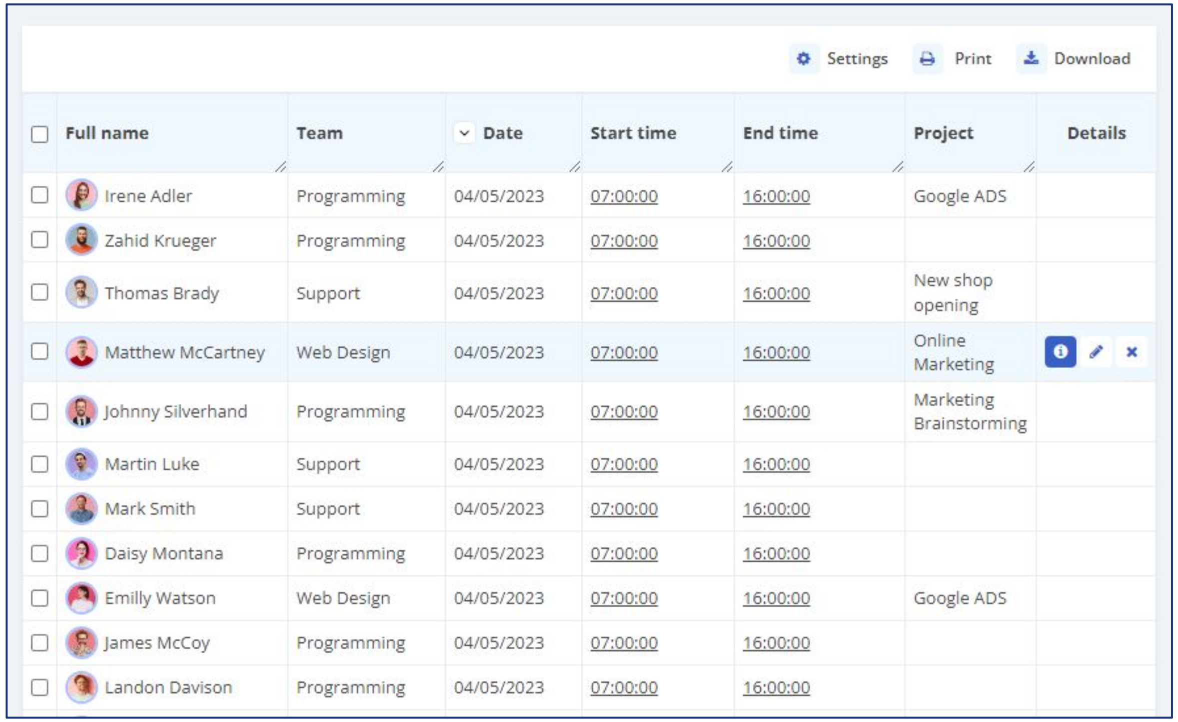
- Click on "Select Period"
- Choose the necessary interval
- Click on "Apply"



How do you check the picture and the location of the check-in?

Depending on the attendance tracking device, the iFlow app records a photo capture of the employee or registers the GPS location. To verify these data:

- Click on "Reports" - "Real Attendance" in the main menu
- Select the "Details" option on the right side of the employee's attendance



Settings Print Download

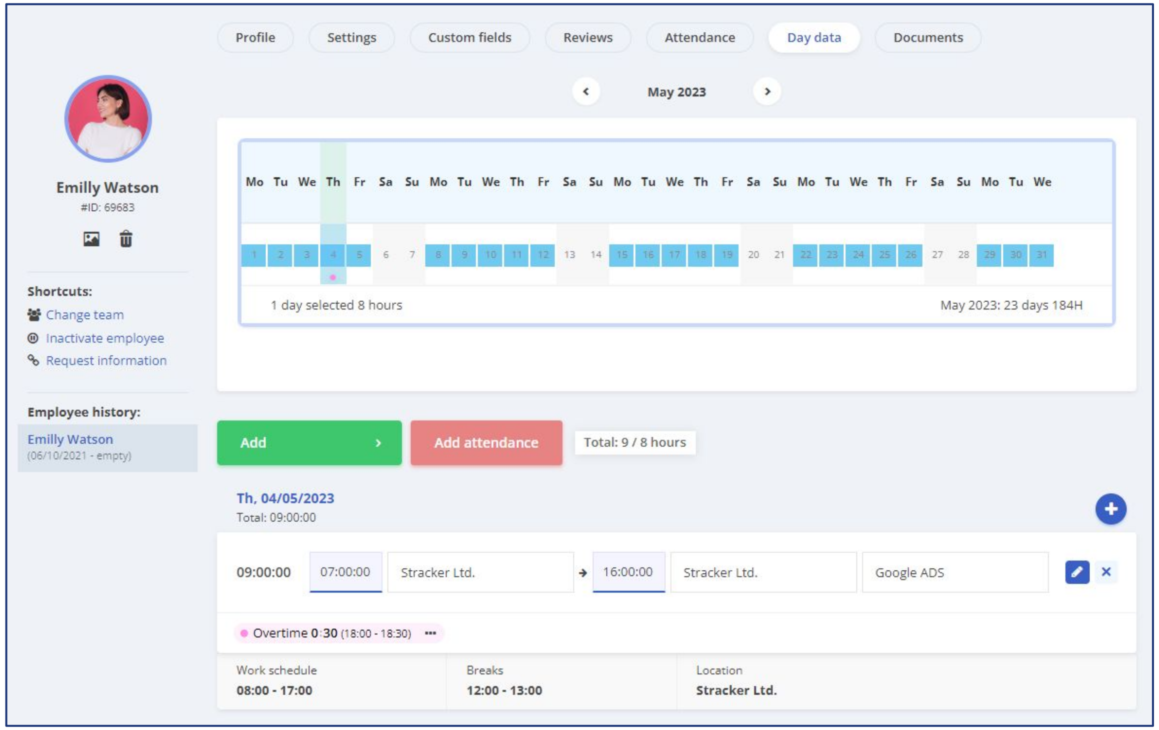
Full name	Team	Date	Start time	End time	Project	Details
Irene Adler	Programming	04/05/2023	07:00:00	16:00:00	Google ADS	
Zahid Krueger	Programming	04/05/2023	07:00:00	16:00:00		
Thomas Brady	Support	04/05/2023	07:00:00	16:00:00	New shop opening	
Matthew McCartney	Web Design	04/05/2023	07:00:00	16:00:00	Online Marketing	
Johnny Silverhand	Programming	04/05/2023	07:00:00	16:00:00	Marketing Brainstorming	
Martin Luke	Support	04/05/2023	07:00:00	16:00:00		
Mark Smith	Support	04/05/2023	07:00:00	16:00:00		
Daisy Montana	Programming	04/05/2023	07:00:00	16:00:00		
Emilly Watson	Web Design	04/05/2023	07:00:00	16:00:00	Google ADS	
James McCoy	Programming	04/05/2023	07:00:00	16:00:00		
Landon Davison	Programming	04/05/2023	07:00:00	16:00:00		

How to edit or delete an incorrect attendance?

If a presence has been recorded incorrectly:

- From the dashboard, click on the respective day next to the employee in question
- In the column dedicated to real attendance, you can modify the incorrect data or delete it

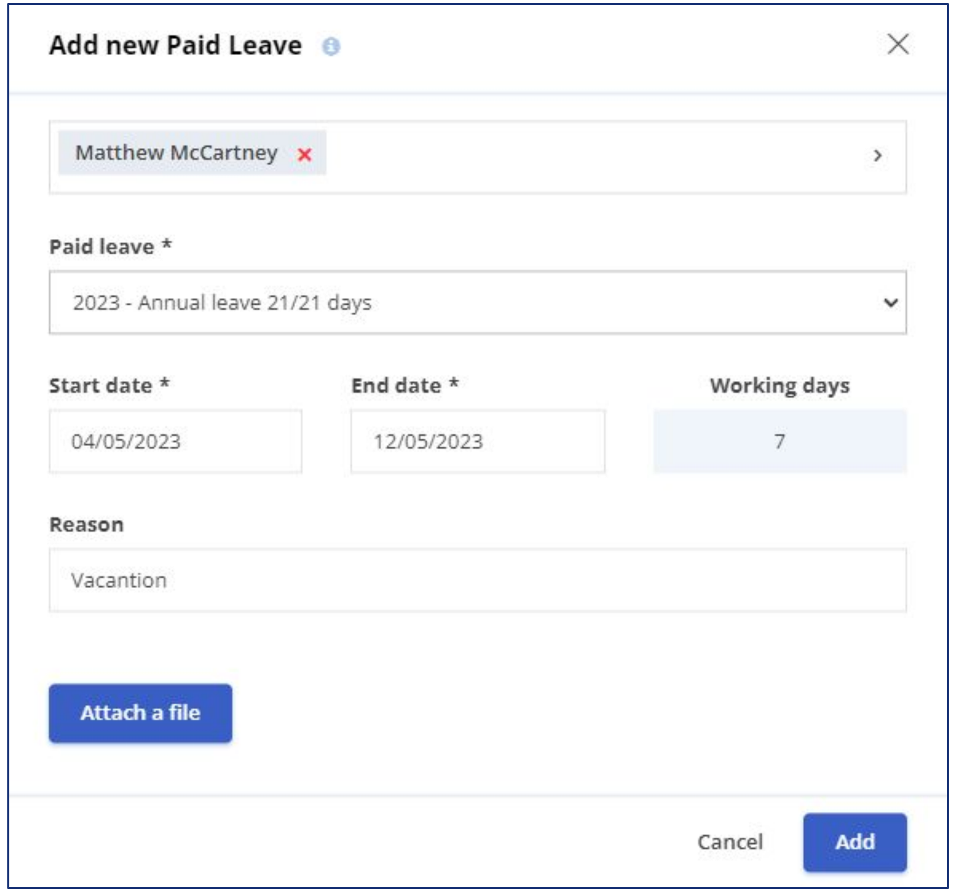
*You will be able to make changes within the real attendance only if the account admin grants you this right.



How do you add events for yourself?

- From the dashboard
- Click on the "Add" button
- Select the desired event
- Complete the necessary information such as date, time, reason, etc.
- Click on the "Add" button

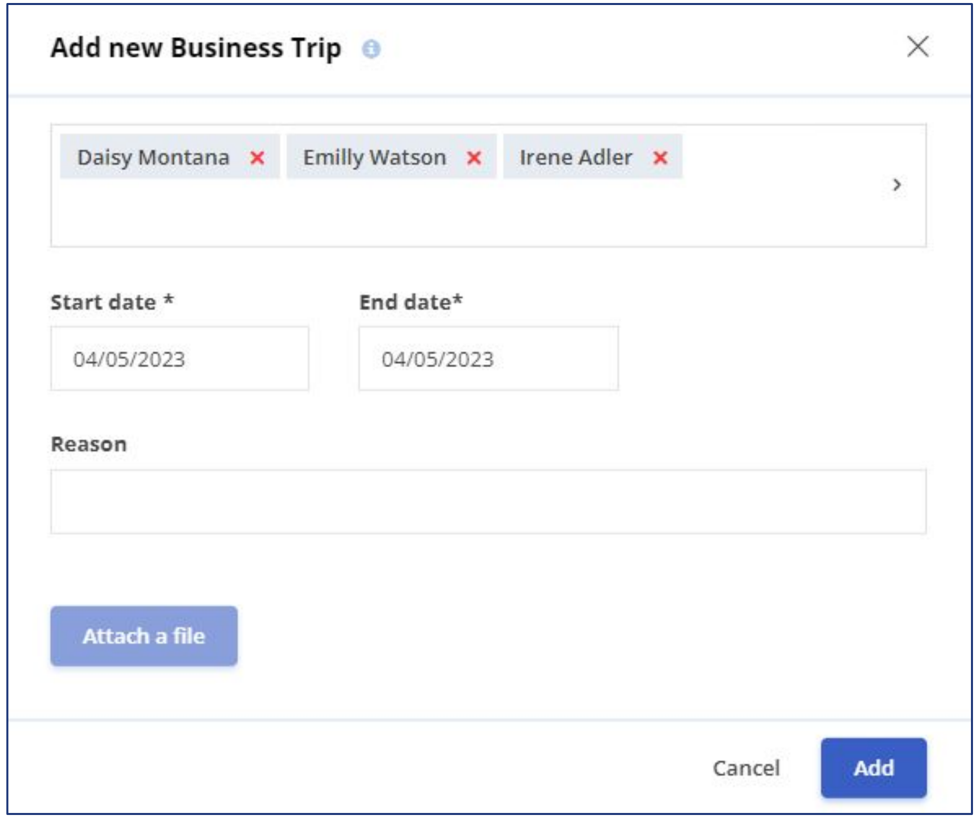
*If you have entered incorrect information, you can edit/delete it while the event awaits approval. Afterward, you must submit an edit request to modify the event.



How to add events for employees?

- From the dashboard
- Click on "Add events"
- Select the desired event
- Select the employee(s)
- Complete the required information such as date, time, reason, etc.
- Click on "Add"

*If you have entered incorrect information, you can edit/delete it at anytime for the employees you supervise.



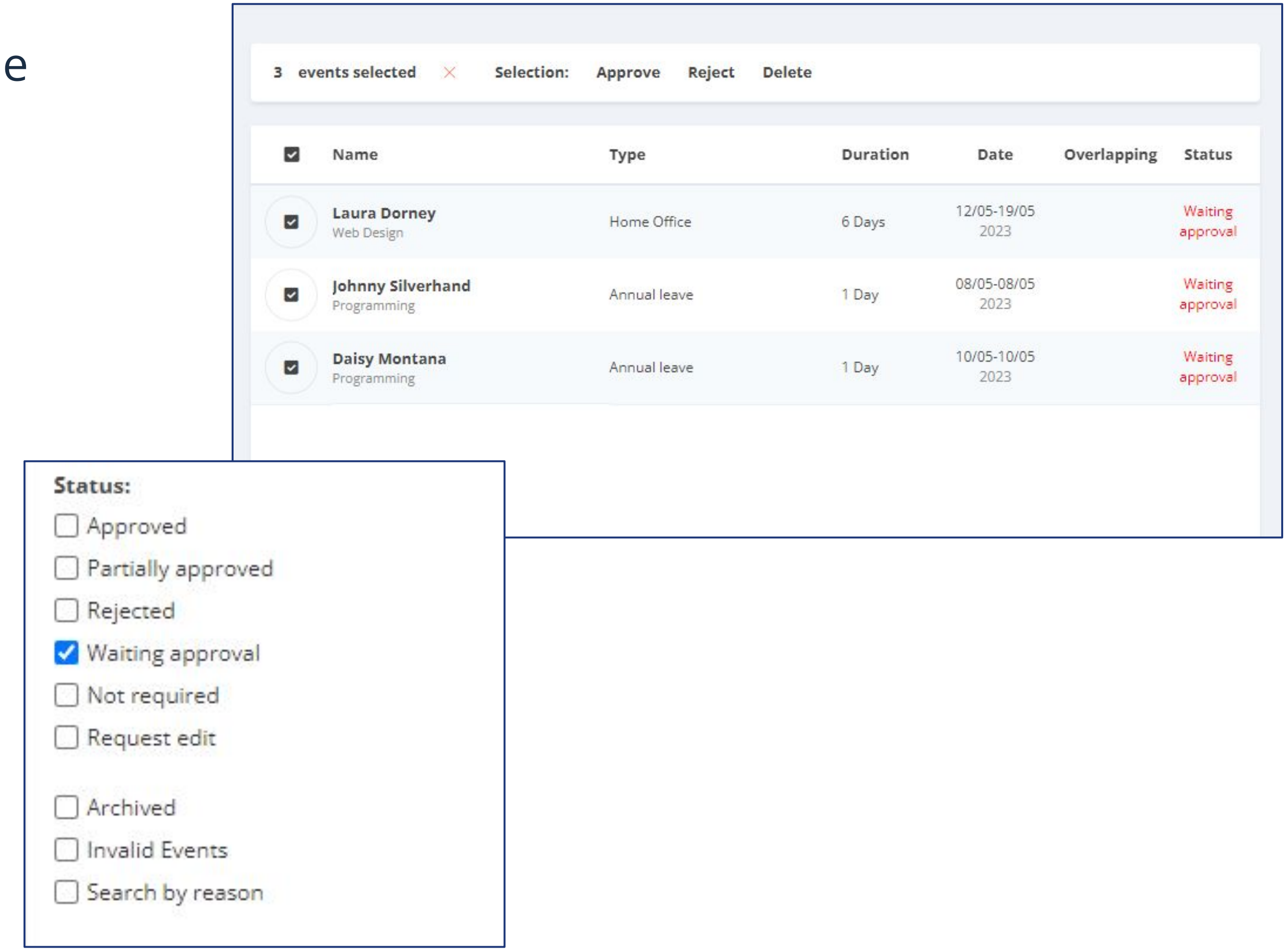
How do you manage events?

From the dashboard:

- Hover your cursor over the three dots on the employee's event
- Choose one of the following options: "Approve", "Reject", "Edit", "Delete"

How to approve events from the Requests menu?

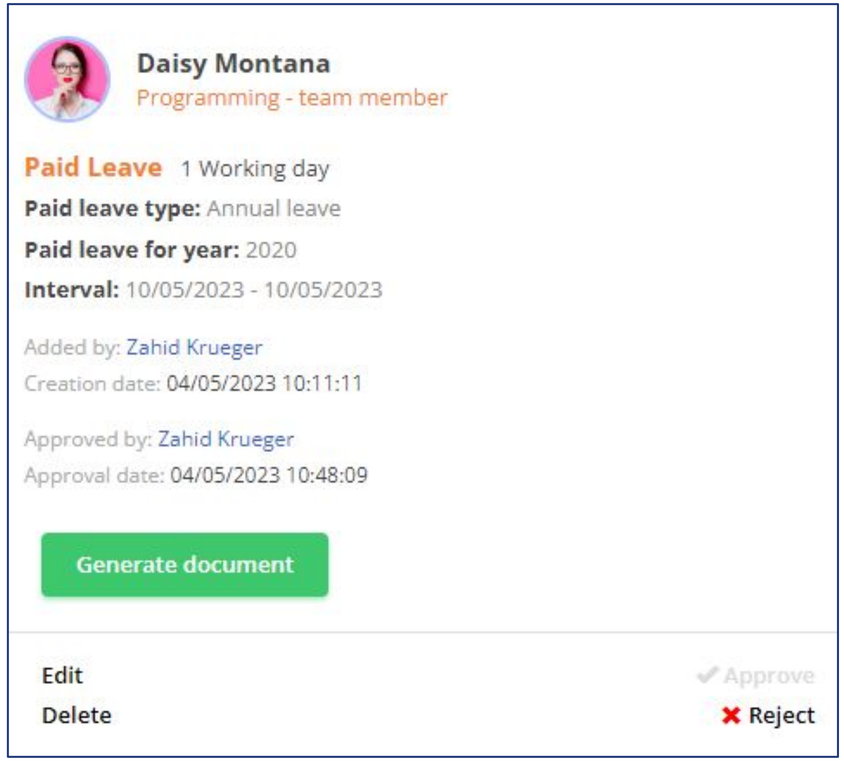
- Click on Requests
- Check "Waiting approval" from the Status filter
- Select the employees
- Click on "Approve"



How to generate a document for an event?

- From the dashboard or Requests menu
- Click on the required event
- Click on the "Generate document" button

Once the document has been generated, you can open it for viewing, editing or printing.

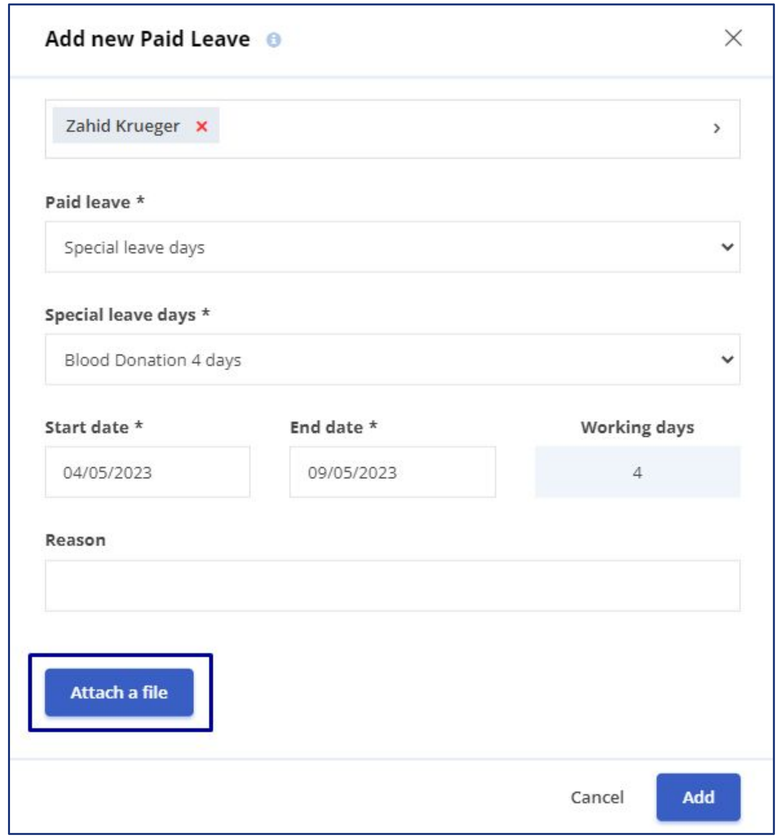


How to upload files to iFlow through an event?

You can upload files to the app when adding an event.

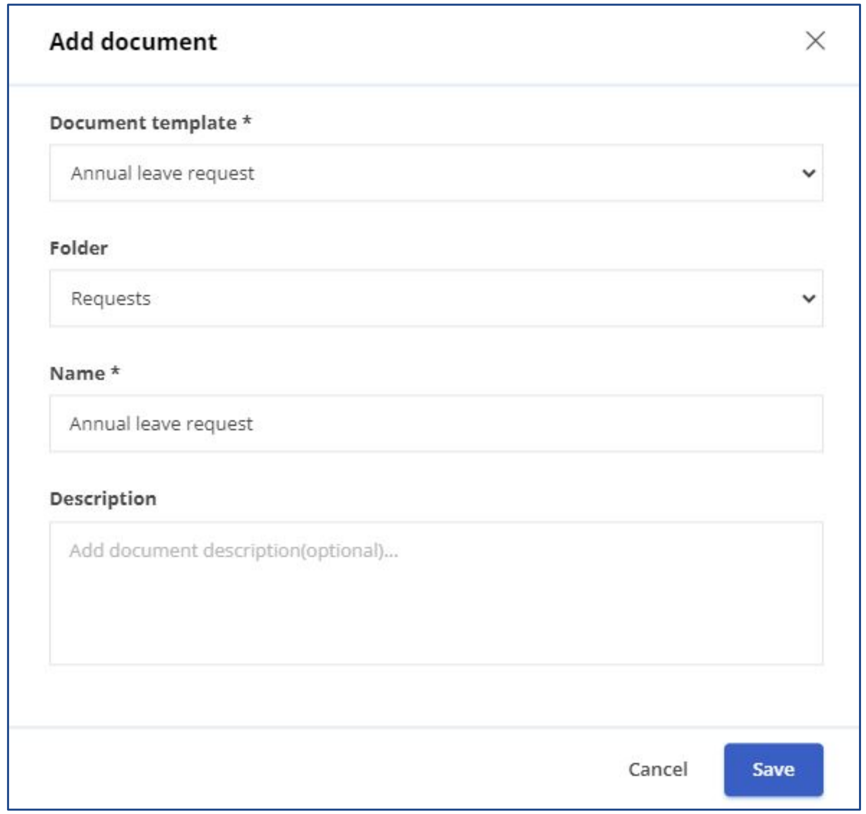
- Click on the "Add event" button
- Select the type of event
- Fill in the required fields
- Click on "Attach file", choose the file
- Click on "Add"

For example, you can attach documents such as a medical certificate or a leave request.



How to upload files to iFlow from an employee's profile?

- Click on the employee
- Click on "Documents" in the top bar
- Click on "Attach file", choose the file
- Select the series and folder of the document
- Click on "Add"



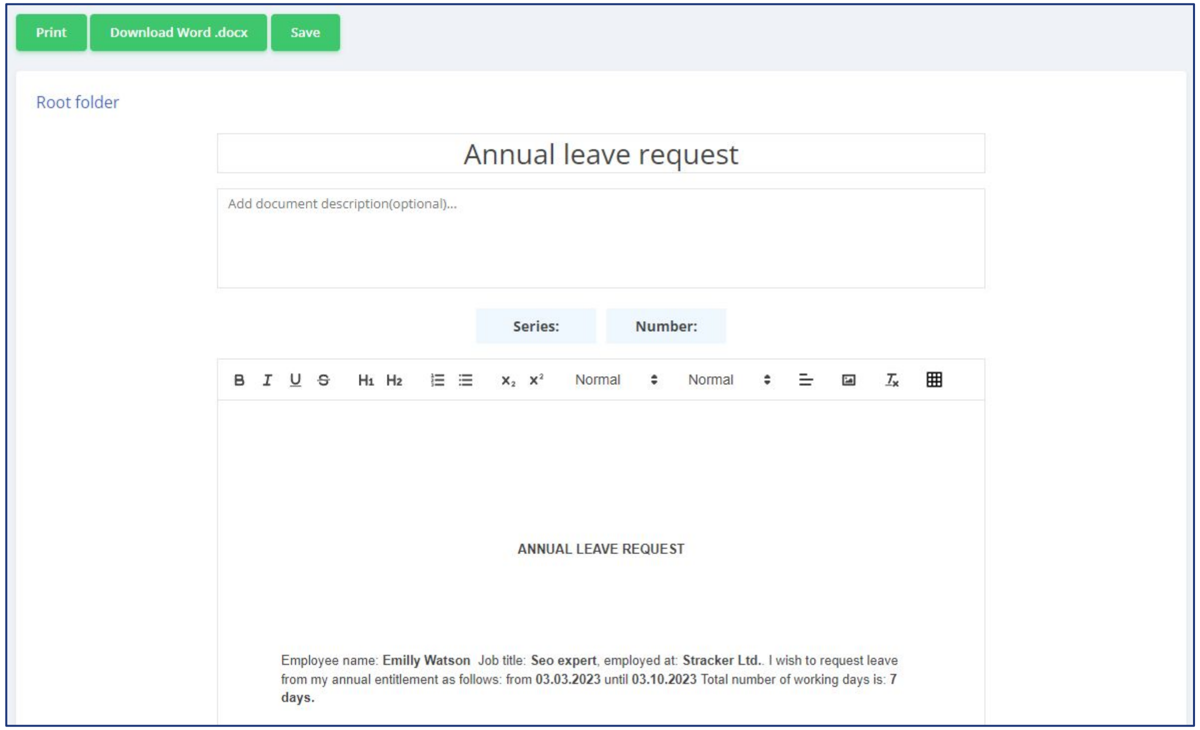
How to access the documents?

From the employee's profile:

- Click on "Documents"
- Choose the necessary file and click on "View"
- Here you can print or download the employee's document

From the Activity menu:

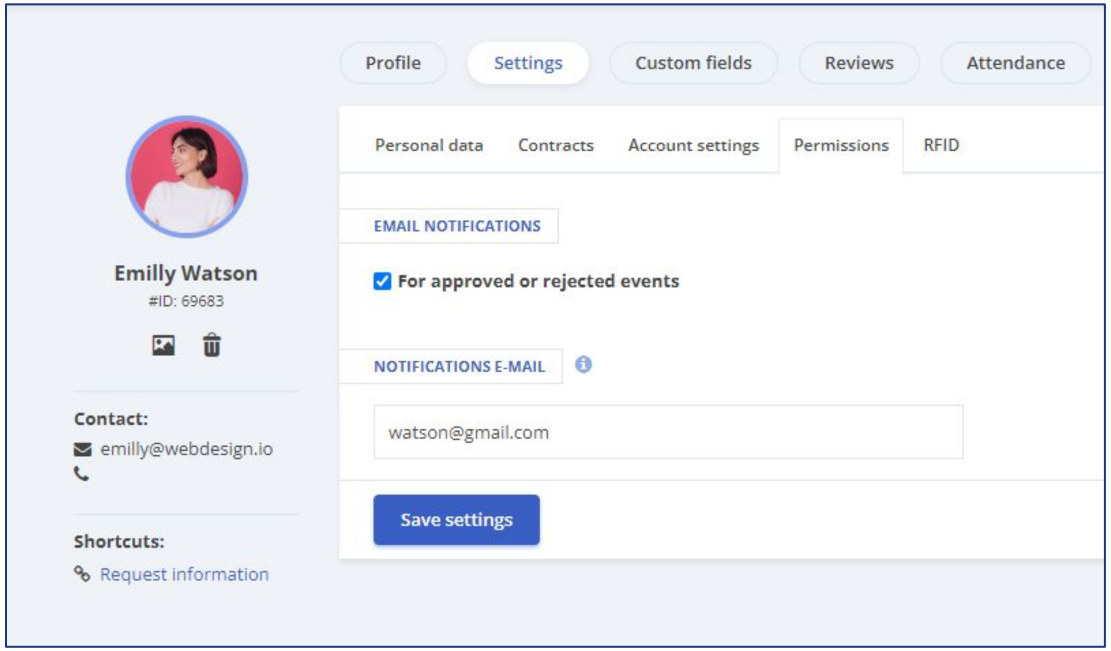
- Click on the event for which you want to print/download the document
- Click on the "Document" button
- Click on the "Download Word.docx" button



How to enable email notifications?

If you want to receive notifications about your events when they are approved or rejected, follow these steps:

- Access your profile
- Click on "Settings"
- Then click on "Permissions"
- Check the box for email notifications
- Click on the "Save settings" button

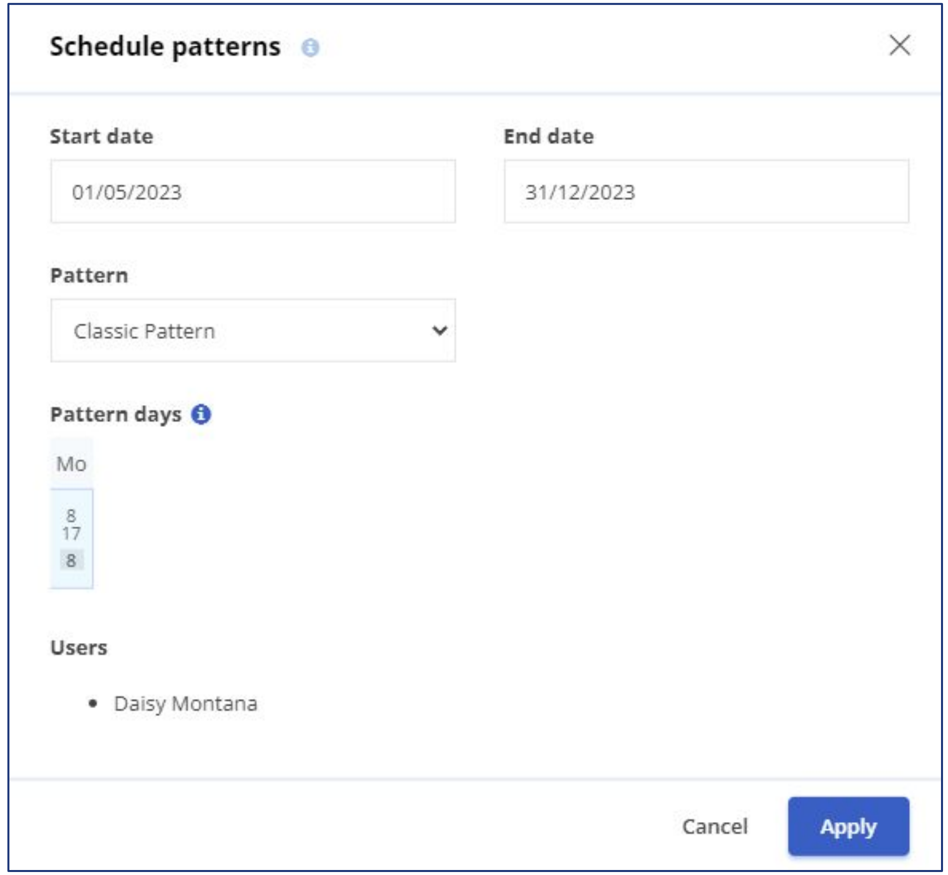


How to set up a work schedule for employees?

From the "Work Schedule" panel:

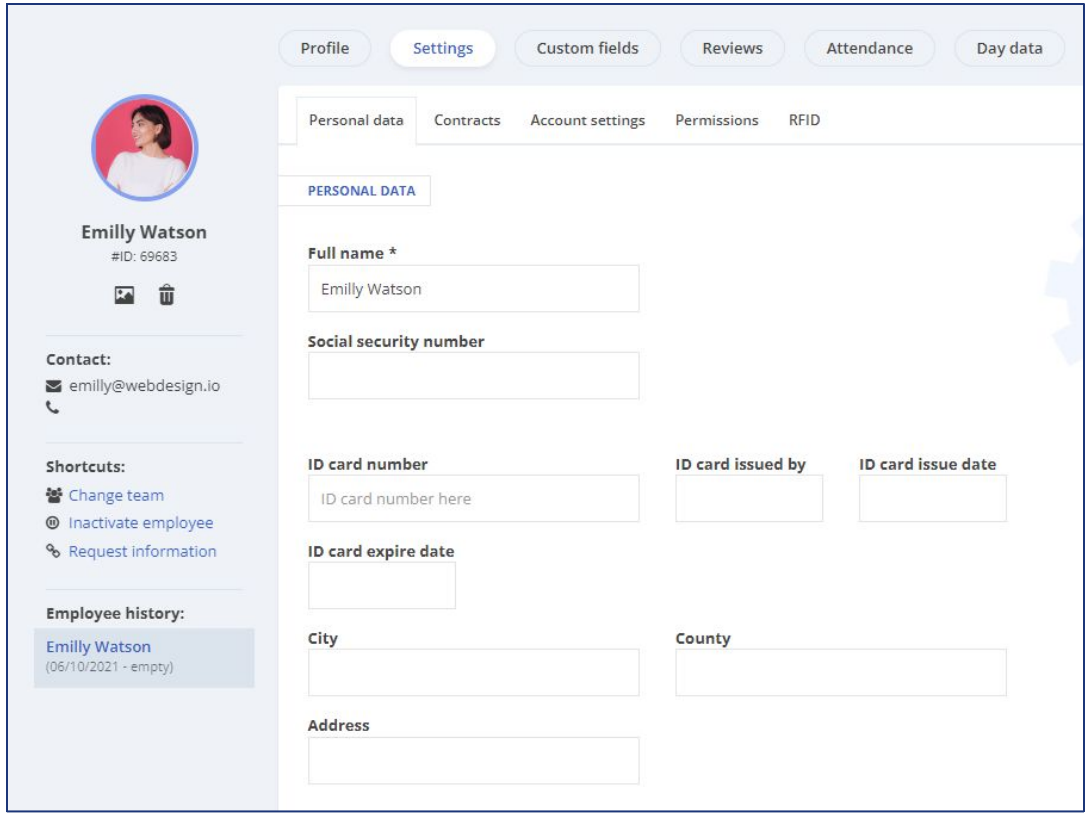
- Right-click on the day when the employee starts working on a specific schedule
- Choose the predefined work schedule model
- Complete with the start and end date of the work period
- Click on "Apply"

*To allocate the schedule to multiple employees simultaneously, select the desired individuals with a left click and repeat the above mentioned steps.



How do you fill in personal data of the employees?

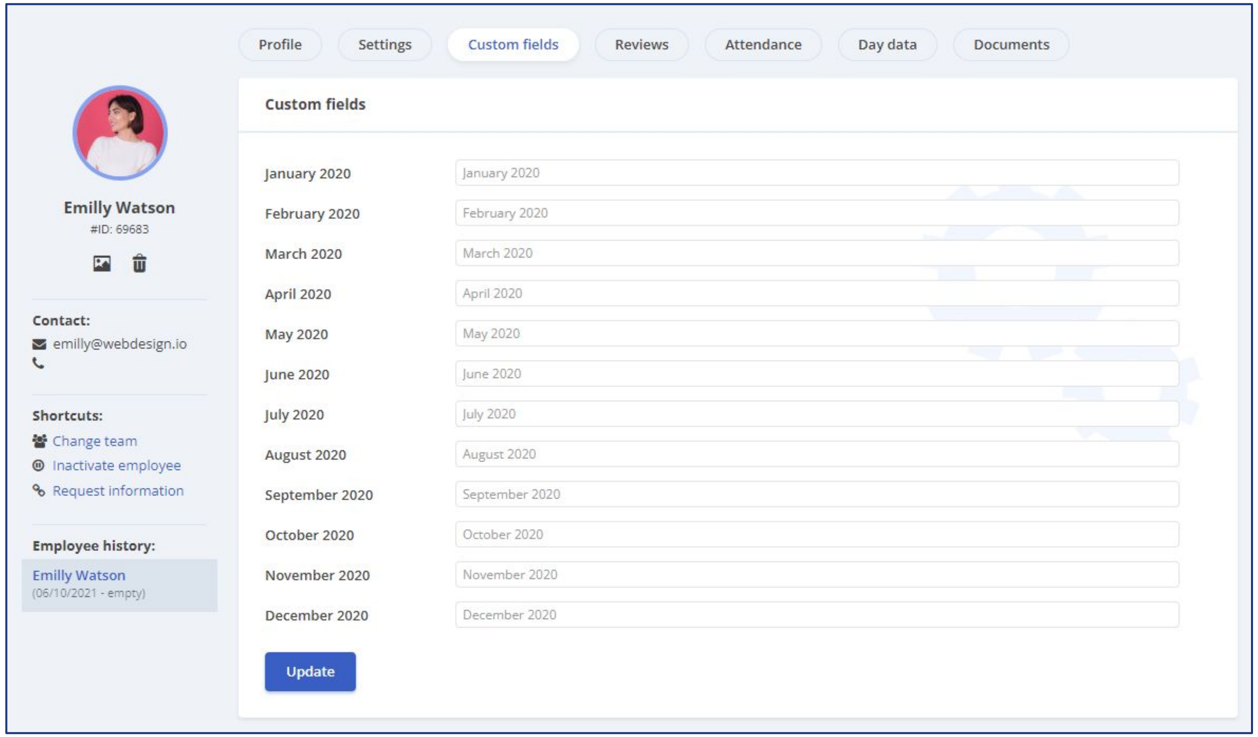
- From the dashboard
- Click on the employee's name from their profile
- Click on the "Settings" menu
- Complete the employee's data
- To save click on the "Save settings" button



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

- From the dashboard
- Click on the employee's name
- In their profile, click on the "Custom Fields" menu
- 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 the dashboard
- Click on the name of the employee you want to allocate vacation days to
- In the "Paid vacation days" section, click on "Add"
- Choose the desired type of leave from the list
- Enter the number of days
- Select the year
- To finalize, click on the "Add" button

*Paid leave types are created by the admin.