

COBI.time - User manual for the Manager

Purpose and area of application

The following is a supplement to the user manual for the standard user of COBI.time for employees in management positions with employee responsibility. It supports the user in maintaining an overview of employees time accounts and absences and in processing absence requests directly in COBI.time.

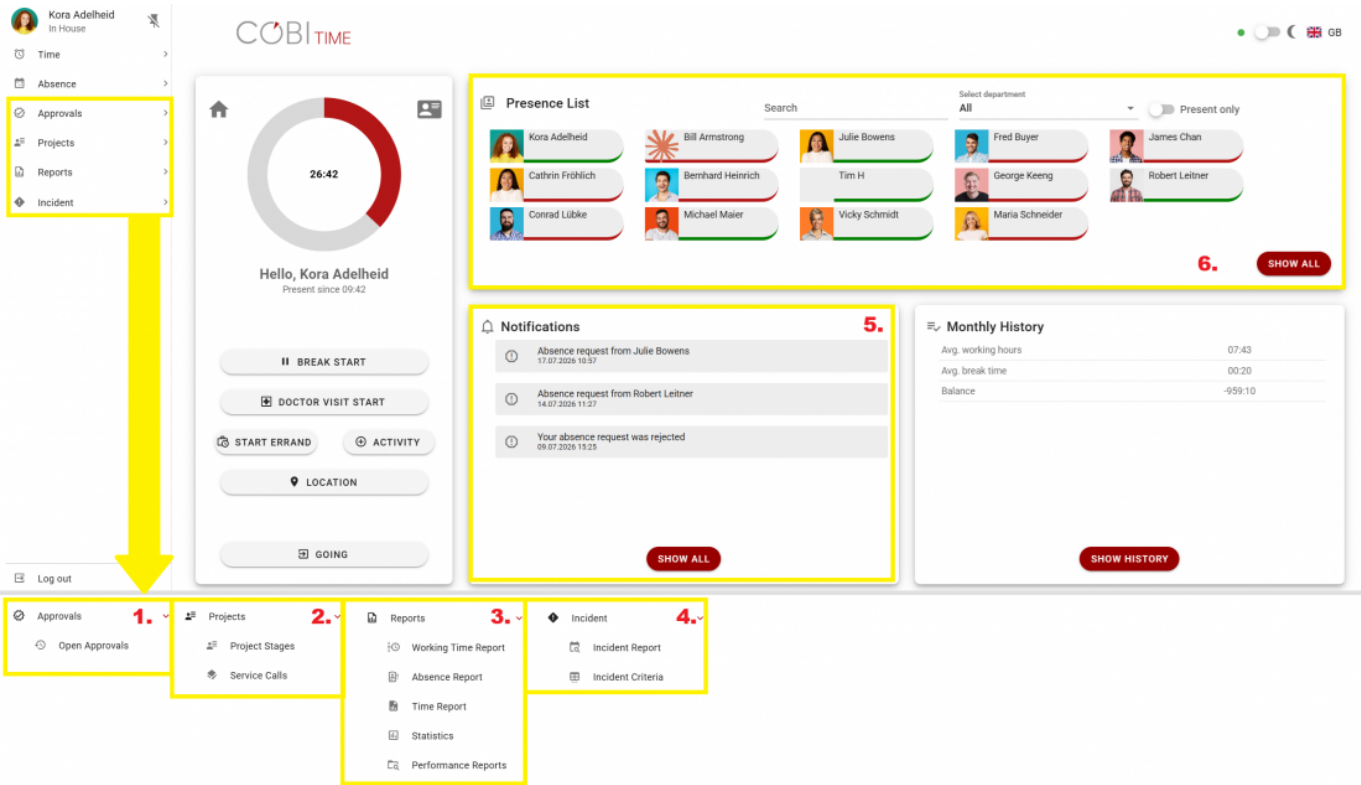
The modules for the supervisor/manager function are activated by the administrator via the user rights administration.

This manual covers the following additional modules:

- Approvals
 - Open Approvals
- Projects
 - Project Stages
 - Service Calls
- Reports
 - Working Time Reports
 - Absence Report
 - Time Report
 - Statistics
 - Performance Reports
- Incident
 - Incident Report
 - Incident Criteria
- Notifications
- Presence list
- Absence overview

The Administration module is not covered in this user manual; please refer to the [manual for the administrator](#).

After logging in to COBI.time, the supervisor receives the same dashboard as the standard user, but with the additional modules in the left menu bar, outlined in yellow in the image below.

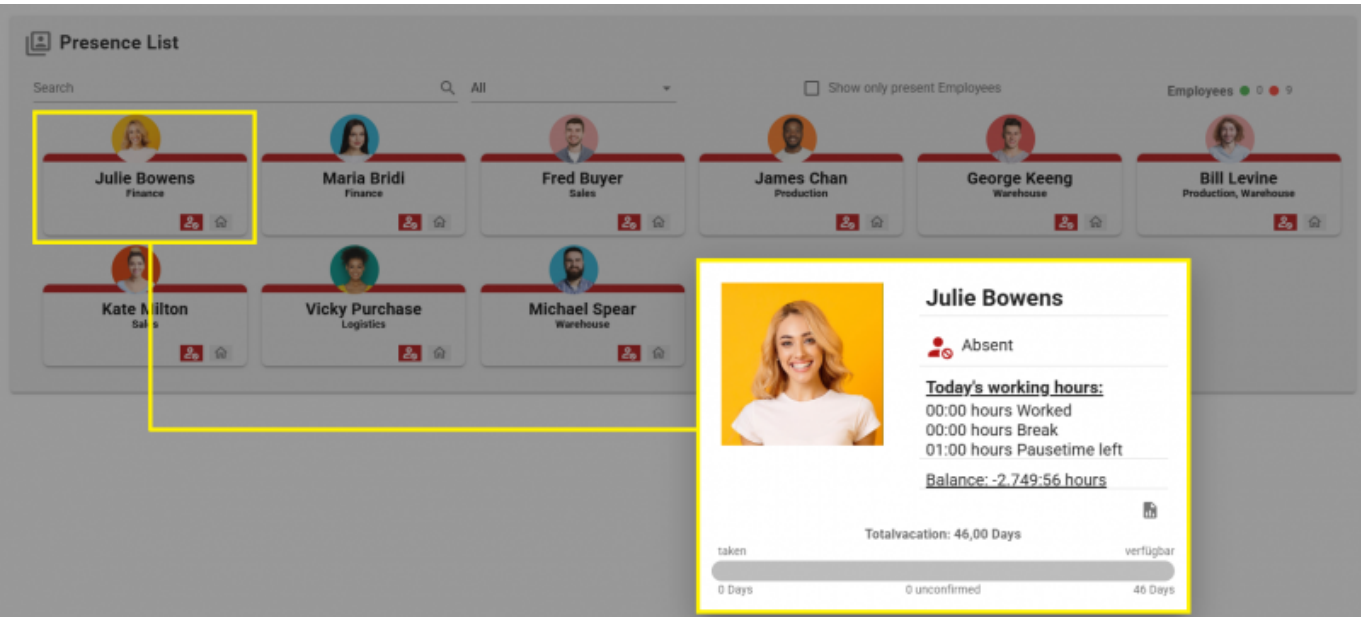


6. Attendance List



Please refer to the user manual for the standard user for the general functions.

The supervisor/manager can view the following information about the employees. Clicking once on an employee opens an overview window in which you can find an overview of the current working time, the time account balance and the holiday days, see illustration below.



In addition, the supervisor has the option of clicking on the “Balance” to display the employee's

monthly history.



Julie Bowens

 Absent

Today's working hours:

00:00 hours Worked

00:00 hours Break

01:00 hours Pausetime left

Balance: -2.749:56 hours



Open monthly history



Totalvacation: 46,00 Days

taken

0 Days

0 unconfirmed

46 Days

verfügbar

The following window opens. A monthly overview is displayed showing the times and absences already booked. You can scroll forwards and backwards month by month using the arrows to the left and right of the monthly display.

History

Date

Julie Bowens

←

03.2024

→



March

MO	DI	MI	DO	FR	SA	SO
26	27	28	29	Mär 1	2	3
				(09:00) / (00:00)		
4	5	6	7	8	9	10
(08:00) / (01:00)	(08:00) / (00:00)	(08:00) / (00:00)	(08:00) / (00:00)	(09:00) / (00:00)		
11	12	13	14	15	16	17
(08:00) / (00:00)	(08:00) / (00:00)	(08:00) / (00:00)	(08:00) / (00:00)			
18	19	20	21	22	23	24
Vacation	Vacation	Vacation	Vacation	Vacation		
25	26	27	28	29	30	31
(08:45) / (00:30)						(01:17) / (00:10)

Timeaccount balance 09:02

By clicking on a single day, you get an overview of the time recording per day.

4
08:00 / 01:00

History

Julie Bowers

Date: 04.03.2024
Monday

Status	Timestamp	Duration
Work started	04.03.2024 08:00	
Break started	04.03.2024 12:00	04:00
Break finished	04.03.2024 13:00	01:00
Work finished	04.03.2024 17:00	04:00

Work Time is 08:00

Break Time is 01:00

+ 00:00

Timeaccount balance 46:00

If the employee has requested a time correction or for any other reason, the supervisor can correct times manually in this view and add a comment to the correction. The comment field is only mandatory if it has been activated in the general settings. Link zu den Einstellungen The comment may not exceed 400 characters.

Options for time correction:

Edit history

Status	Timestamp	Time
Work started	04.03.2024	08:00
Break started	04.03.2024	12:00
Break finished	04.03.2024	13:00
Work finished	04.03.2024	17:00
+	04.03.2024	00:00
Work started	05.03.2024	08:00

Work started

Work finished

Break started

Break finished

Project Start

Project End

Comment

SAVE

12:00

If you click on a time that has already been booked, you can now set a different time.

Clicking on the arrow next to the status opens a selection menu in which a status can be selected accordingly.

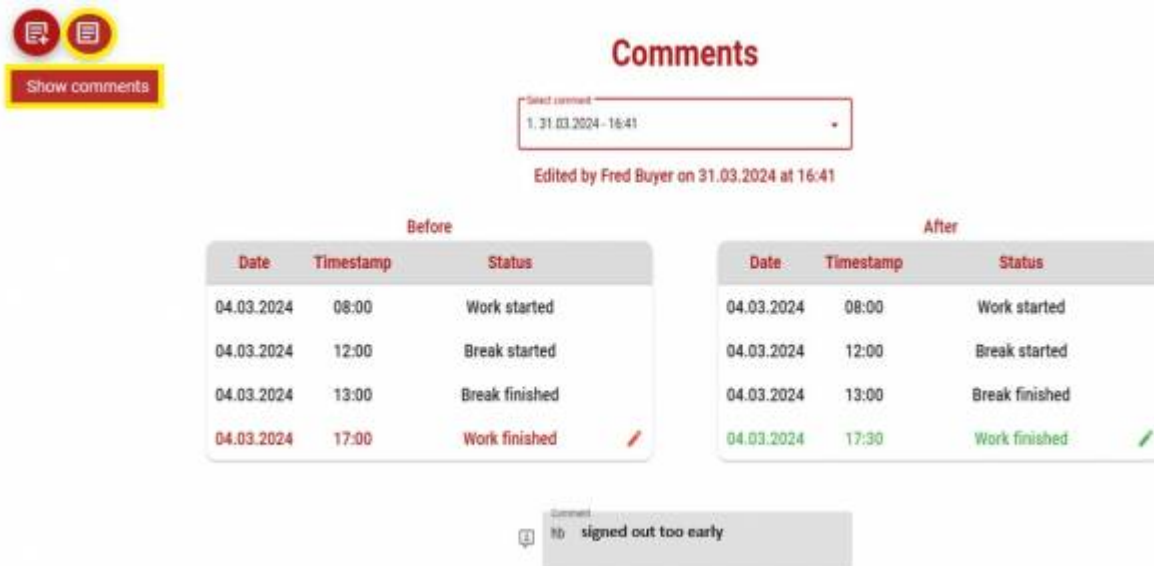
You can add lines via the “plus” if, for example, you would like to add times to a project.

The entry does not necessarily have to be entered in the correct order of the daily schedule. The line

automatically jumps to the correct position when the “Enter” key is pressed after the correction.

If the comment field is activated, it must also be filled in, for example the reason for the time correction can be entered here. Otherwise, you cannot save the changes.

You can use the “Show comments” function at the top right to display the corresponding comments for the changes. When you click on the button, only days are displayed for selection where changes have been made; after selecting the day, for example, the following overview is displayed:



Comments

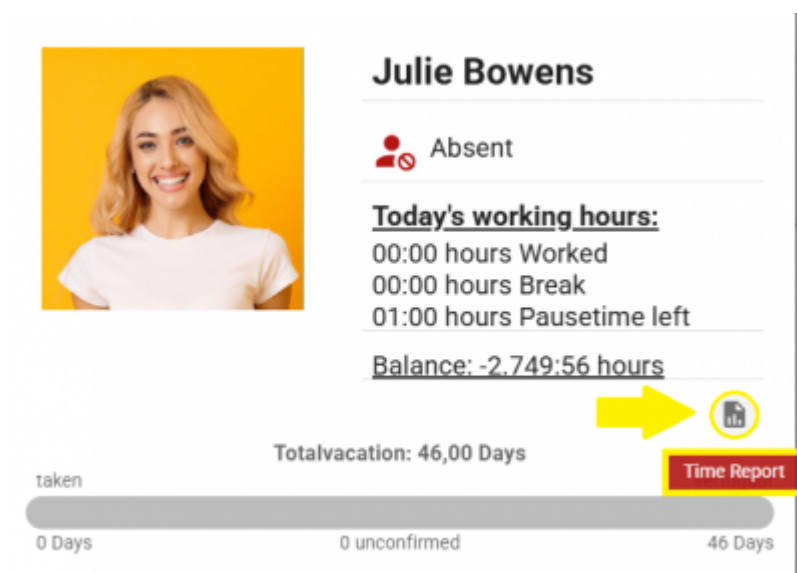
Select comment
1. 31.03.2024 - 16:41

Edited by Fred Buyer on 31.03.2024 at 16:41

Before			After		
Date	Timestamp	Status	Date	Timestamp	Status
04.03.2024	08:00	Work started	04.03.2024	08:00	Work started
04.03.2024	12:00	Break started	04.03.2024	12:00	Break started
04.03.2024	13:00	Break finished	04.03.2024	13:00	Break finished
04.03.2024	17:00	Work finished	04.03.2024	17:30	Work finished

Comment
No signed out too early

The supervisor also has the option of having a time report created from the employee. For this purpose, click on the icon (highlighted in yellow) next to the balance in the information window.



Julie Bowens

 Absent

Today's working hours:
00:00 hours Worked
00:00 hours Break
01:00 hours Pausetime left

Balance: -2.749:56 hours

Totalvacation: 46,00 Days

taken
0 Days
0 unconfirmed
46 Days

 **Time Report**

The “Time report” is a separate module in the menu bar, which can be applied to all employees (see point 3.) and can also be called up within the information window of the individual employee, exclusively for this employee, after clicking on the employee within the attendance list. The general view and the structure of the time report are the same.

After requesting the employee's time report, you get the following view (example of a week in Feb.24):

Time Report March 2024

EXPORT

←

Julie Bowens

→

		Total Actual Working Time	Difference in per cent	Target Working Time
		94:28 ↓	128:00	-26.20%
		Total Target Working Time	Target Working Time	Balance
Sunday	15:01 - 18:24 (Work: 03:13 - Break: 00:10)	03:13	00:00	14:41
2024-03-31				
Friday		00:00	08:00	08:15
2024-03-29				
Saturday		00:00	00:00	08:15
2024-03-30				
Friday	Start Time: 00:00 08:00 - 17:00 (Work: 09:00 - Break: 00:00)	09:00	08:00	46:00
2024-03-01				
Saturday		00:00	00:00	46:00
2024-03-02				
Sunday		00:00	00:00	46:00
2024-03-03				
Monday	08:00 - 17:30 (Work: 08:30 - Break: 01:00)	08:30	08:00	46:30
2024-03-04				
Tuesday	08:00 - 12:45 (Work: 04:45 - Break: 00:00) 12:45 - 14:20 (Project: 01:35 - Break: 00:00) 14:20 - 16:00 (Work: 01:40	08:00	08:00	46:30
2024-03-05				
Wednesday	08:00 - 16:00 (Work: 08:00 - Break: 00:00)	08:00	08:00	46:30
2024-03-06				
Thursday	08:00 - 16:00 (Work: 08:00 - Break: 00:00)	08:00	08:00	46:30
2024-03-07				

The actual and target working time, the difference in per cent and the corresponding balance are displayed. The booked times including the break are visible for the individual days. If projects have been booked, you can see these by moving the mouse pointer over the project symbol. The red arrows to the left and right of the name can be used to scroll forwards and backwards by month. This information can be imported into Excel via the “Export” button and processed accordingly.

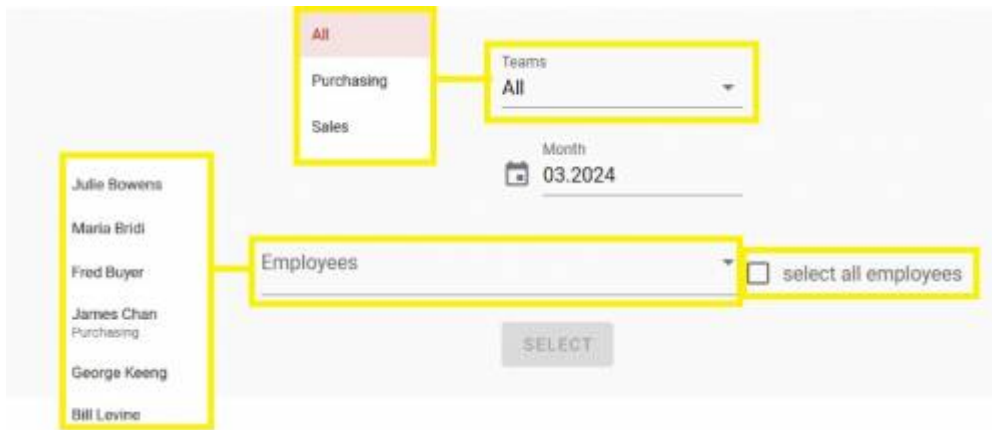
2. Absence Overview



Absence Overview

The “Absence overview” module in the menu bar gives the manager an overview of the remaining holidays, already booked and requested absences of the employees.

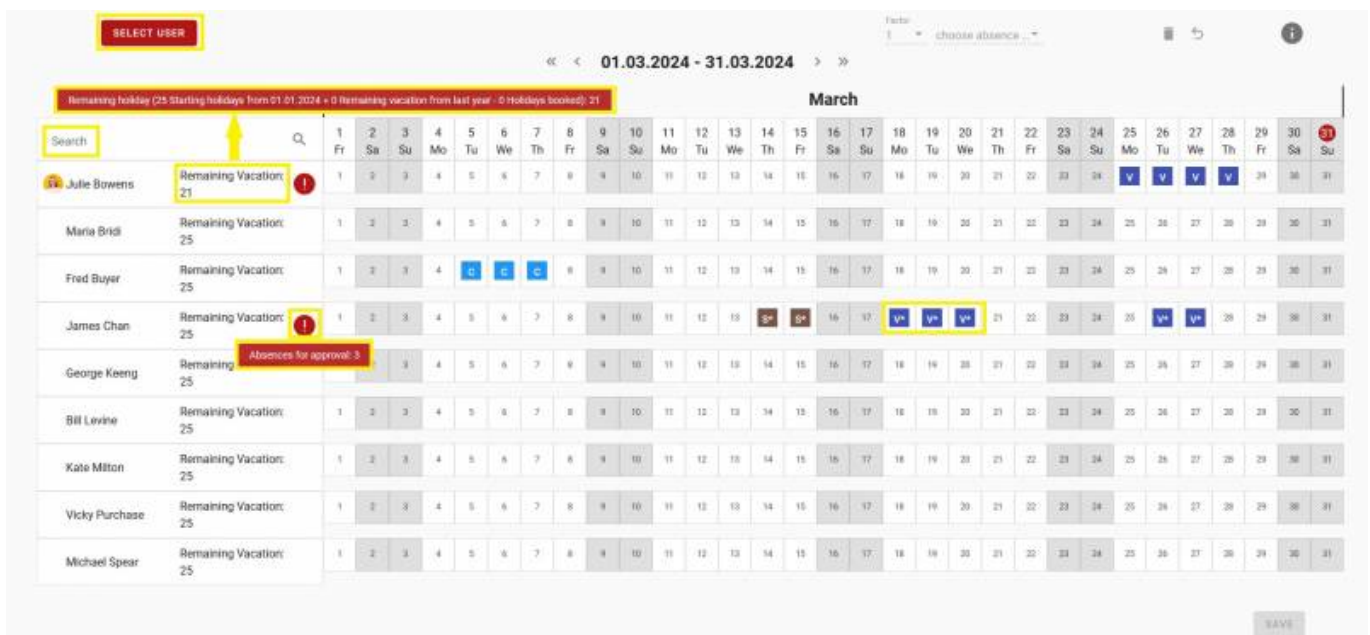
Clicking on the icon opens the following screen.



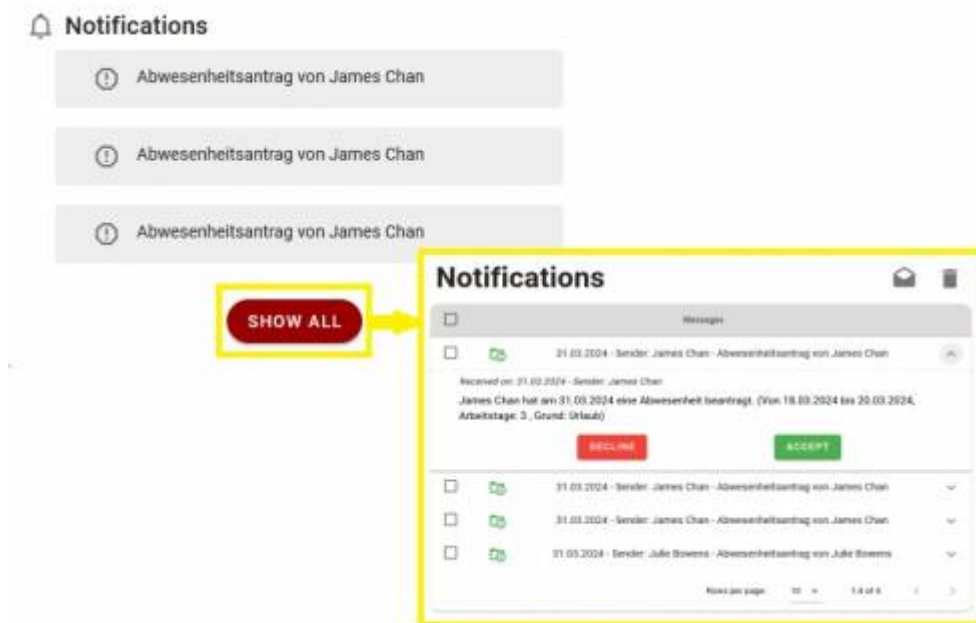
You also have the option of filtering by teams or individual employees or clicking on “All employees” to get a complete overview. If you have selected a team, the “Employees” filter only displays the employees of this team and you then have to select them either completely or individually.

You can also use the date or month selection to display absences in the past.

Below is an example of the view of an absence overview:



- If nothing else is selected, the current month is always displayed in the absence overview; you can scroll forwards and backwards using the arrows to the right and left of the date.
- The search function at the top left takes you back to the filter mask.
- If you move the mouse pointer over the “Remaining holiday” field, you will see an overview of how this is made up, as shown above.
- The exclamation mark next to the employee's name indicates that the employee has submitted an absence request. Requested and unconfirmed absences are marked with an asterisk in the calendar.
- In the top right-hand corner, it is possible to display the name and colour legend of the reasons for absence.
- ADDITION: The manager can also find the notifications of absence requests in the dashboard under “Notifications”, these can also be edited from there, see illustration below and picture at the top of the dashboard, point 4.



Approval/rejection of absences There are two ways to approve absence requests. Firstly, you can click on the exclamation mark icon and all of the employee's absence requests will be listed one below the other. Based on the information "Received on:" under the reason for absence, you can decide which absences should be approved. This would also be a helpful decision-making aid, for example, if several employees have submitted a holiday request for the same period

Absences for approval

Vacation from 18.03.2024 until 20.03.2024

date is missing

ACCEPT
DECLINE

Sickness from 14.03.2024 until 15.03.2024

ACCEPT
DECLINE

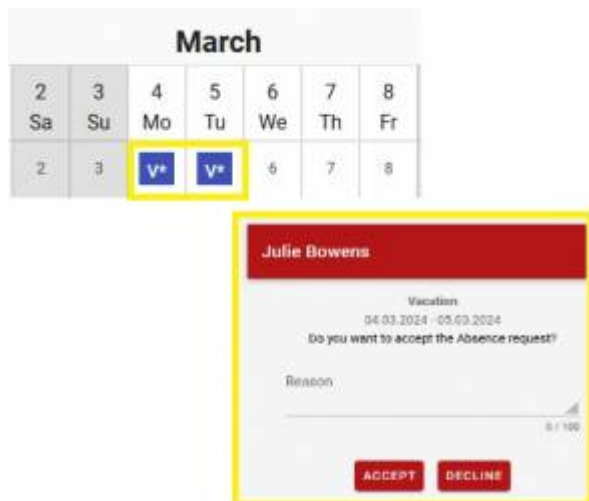
Vacation from 26.03.2024 until 27.03.2024

ACCEPT
DECLINE

SAVE
CANCEL

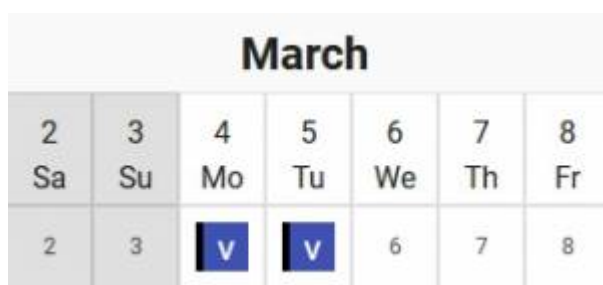
Individual requests can be accepted or rejected.

In addition, absence requests can be processed directly in the calendar by simply clicking on the symbol with an asterisk in the calendar, the absence request opens and can be approved or rejected.



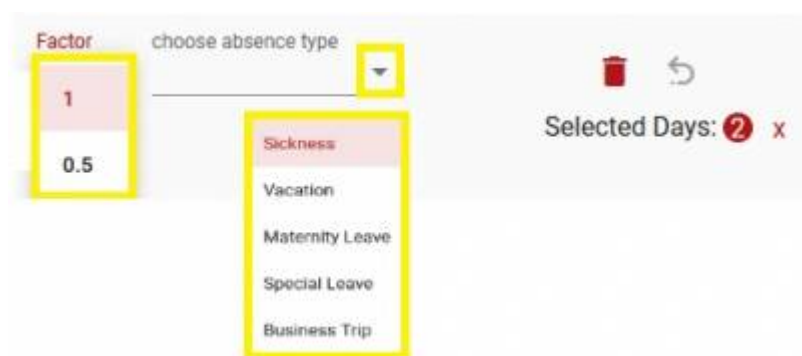
The advantage of approval via the exclamation mark symbol is that several absence requests are listed, which may not be visible in the calendar immediately if they were submitted for different months.

After an absence request has been approved, the asterisk * in the absence symbol disappears and the left margin turns black, i.e. the request has been approved but not yet finally saved.



If an absence request is rejected, the absence icon disappears from the calendar immediately. The employee generally receives notifications in their own dashboard when a request is accepted or rejected.

It is also possible to edit the absence calendar manually, for example if you want to add a sick note. To do this, select the relevant weekdays within the calendar, then select the appropriate one from the list of defined absence reasons in the upper area. The factors 1 and 0.5 stand for one and half a day respectively. Once the selection has been made, the symbol with the left black border appears in the calendar. This time it is not marked with an asterisk because this reason for absence has been entered manually. Again, this has not yet been finally saved.



All changes (accepting and rejecting absence requests) are listed in a legend in the bottom right-hand

corner and must be finally saved before leaving the module.

13	14	15	16	17	13	14	15	16	17
We	Th	Fr	Sa	Su	We	Th	Fr	Sa	Su
13	✓	✓	16	17	13	C	C	16	17

As soon as you click on the “Save” button, you will be shown another change overview listing how many and which changes you have made. You can use the arrow next to the number to display details and thus check again whether everything is legal.

Changes: 0

Deleted: 0

Added: 2

Decline: 0

SAVE

Once the absences have been finally saved, the black bars in the icon disappear..

Changes overview

Added absences

2

^

Julie Bowens2024-03-14Child Sick

Julie Bowens2024-03-15Child Sick

Deleted absences

0

v

Accepted absences

0

v

Declined absences

0

v

Changed absences

0

v

SAVE

3. Time report



Time Report

After clicking on the “Time report” symbol, the following screen appears.

Time Report

teams
All

All
Purchasing
Sales

Employees

☐ select all employees

Reporttype
Monthly

Monthly
Time Period

2024
March

< 2024 >

JAN FEB MAR
APR MAY JUN
JUL AUG SEP
OCT NOV DEC

REQUEST

Here you have the option of filtering by teams or departments.

In the second option, a list of all employees is displayed, from which you can select one or more employees. Deactivated employees are not displayed for selection.

In the third option, all employees can be displayed.

You can also select a report type. The report can be selected monthly or for a specific period. You also have the option of using the arrows in the displayed calendar to scroll by year and/or select the months.

Once all criteria have been selected, click on the "Request" button and the corresponding time report will be created.

Below is an example of a requested time report for all employees for the month of January 2024:

Time Report March 2024

EXPORT ALLEXPORT

Julie Bowens

		Total Actual Working Time	Difference in per cent	Target Working Time
		95:15 ↓	120:00	-20.62%
		Total Target Working Time	Target Working Time	Balance
Sunday	15:01 - 19:11 (Work: 04:00 - Break: 00:10)	04:00	00:00	24:10
2024-03-31				
Friday		00:00	08:00	16:15
2024-03-29				
Saturday		00:00	00:00	16:15
2024-03-30				
Friday	Start Time: 00:00 08:00 - 17:00 (Work: 09:00 - Break: 00:00)	09:00	08:00	46:00
2024-03-01				
Saturday		00:00	00:00	46:00
2024-03-02				
Sunday		00:00	00:00	46:00
2024-03-03				
Monday	08:00 - 17:30 (Work: 08:30 - Break: 01:00)	08:30	08:00	46:30
2024-03-04				
Tuesday	08:00 - 12:45 (Work: 04:45 - Break: 00:00) 12:45 - 14:20 (Project: 01:35 - Break: 00:00) 📄 14:20 - 16:00 (Work: 01:40 - Break: 00:00)	08:00	08:00	46:30
2024-03-05				
Wednesday	08:00 - 16:00 (Work: 08:00 - Break: 00:00)	08:00	08:00	46:30
2024-03-06				
Thursday	08:00 - 16:00 (Work: 08:00 - Break: 00:00)	08:00	08:00	46:30
2024-03-07				
Friday	08:00 - 17:00 (Work: 09:00 - Break: 00:00)	09:00	08:00	47:30
2024-03-08				
Saturday		00:00	00:00	47:30
2024-03-09				
Sunday		00:00	00:00	47:30
2024-03-10				
Monday	08:00 - 16:00 (Work: 08:00 - Break: 00:00)	08:00	08:00	47:30

Using the drop-down menu in the name field (employees are displayed here in alphabetical order), you can select an employee and view their time report.

It is also possible to scroll through the time reports month by month using the two red arrows on the right and left, regardless of which month was previously selected.

In addition, you can use the two “Export” buttons at the top right to import the reports into an Excel file for further processing, for example to make them available to a tax office.

The “Export All” button imports all time reports for the employees included in the selection into an Excel file. An Excel data sheet is displayed for each employee, the names of the employees are displayed in the tab labelled below.

Only the time report of the employee currently displayed is imported into an Excel file via the “Export” button.

The working and break times are shown separately in the time reports exported to Excel.

4. Project Stages - Rights and Assignments



Target Group: Project/Team Leaders, HR/PMO

Purpose: Check and manage rights, project sub-stages, and activities per employee.

With the module *Project Stages - Rights and Assignments*, you can view and edit an employee's assignments to projects, sub-stages, and activities. The displayed projects are retrieved in real time from the SAP Business One master data.

Project Stages - Rights and Assignments

Select user: **Kora Adelheid**  Select department: **All**

☐ Transfer permissions to other user

Search for business partner name or code

Hardware Introduction Business Partner Name: Büro Online AG Business Partner Code: C25000 Status: Started  	Hardware Introduction Subprojects Business Partner Name: Büroausstatter Mayer Business Partner Code: C40000 Status: Started 	Internal Project Status: Started 
Production smt Business Partner Name: Büro Online AG Business Partner Code: C25000 Status: Started 	IT Project Internal Status: Started 	Inventory Count Business Partner Name Bernhardt GmbH Business Partner Code: C12945 Status: Started 
Pharmalog Test 1 Business Partner Name: Muller&Clausen Metall AC Business Partner Code: V20000 Status: Started 	Pharmalog Test 2 Status: Started 	Bernhardt GmbH - Corporate Party Business Partner Name Bernhardt GmbH Business Partner Code: C12945 Status: Started 

Prerequisites

- Projects are created and active in SAP Business One.
- You have the required permissions for rights management in COBI.time.

Step-by-Step

1. Select User: Click on Select User and choose the desired employee.
2. (Optional) Filter by Department: Narrow the display to a specific department.
3. Search/Find Project: Scroll or search for the relevant project card.
4. Open Project: Click the pencil icon on the project card.
5. Adjust Rights & Assignments: Modify sub-stages/activities according to your processes and

save.

6. (Optional) Transfer Configuration: Enable Transfer permissions to other users, select the target users, and confirm.

Fields on the Project Card

- Title: Project name (from SAP Business One).
- Business Partner Name/Code: Reference to the associated BP.
- Status: Project status (e.g., Started).
- Edit (Pencil): Opens the detailed editing view.

Best Practices

- Make changes first on a reference user and then roll them out to others using the transfer option.
- If projects are not visible, verify that they are active in SAP B1 and assigned to the user's process.
- After major permission changes, ask the user to log in again to COBI.time.

Detailed View: Edit Project Stages

After clicking the pencil icon on a project card, the detailed editing view opens. Here, you can define the individual project stages as well as the associated activity types and planned values (time & cost) for the selected employee.

Edit Project Stages for Kora Adelheid

 Buro Online AG

 Hardware Introduction

Steps

Recording of Open Issues and Current Situation

Planned Costs per epic hour

0 €

Planned Hours

0 hours

Activity types

Consulting

Konzepterstellung

Compilation of Topics

Planned Costs per epic hour

0 €

Planned Hours

0 hours

Activity types

Consulting

Konzepterstellung

Drafting Concept

Planning Project Implementation

SAVE

Layout of the Interface

Section	Function
Project Name & Business Partner	Displays the project title and the associated business partner from SAP Business One.

COBISOFT Documentation - <https://docs.cobisoft.de/wiki/>

Section	Function
Project Stages	Each stage represents a work package (e.g., "Recording of Open Issues", "Compilation of Topics", "Concept Creation").
Planned Cost (€ per Hour)	Define the planned cost rate for this stage.
Planned Time (Hours)	Expected duration of the stage. Used as a planning value and for reporting reference.
Activity Types (Toggles)	Assign allowed activity types to the user (e.g., Consulting, On-Site Visit, Planning, Concept Creation).
Stage Activation (Red Toggle on the Right)	Activates or deactivates the respective project stage for the user.
SAVE Button	Saves all performed changes.

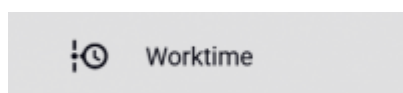
Step-by-Step

1. Select Project Stage: Each displayed tile represents a stage of the project.
2. Enter Costs & Time: Input the planned values per hour and/or total hours.
3. Assign Activity Types: Use the toggles to activate the applicable activity types for this stage.
4. Activate/Deactivate Stage: Use the red toggle at the top right of each tile to enable or disable the stage.
5. Save: Click SAVE to store all changes.

Notes

- Inactive stages will not appear for the user in COBI.time.
- Changes take effect immediately after saving – the user may need to re-log into COBI.time.
- Multiple activity types can be activated simultaneously.

5. Reporting - Working Time



Target group: Team Leaders, HR/PMO, Controlling

Purpose: Overview of employees' working times, project times, breaks, and target hours.

This module provides various evaluations of working times, which can be displayed as daily, weekly, monthly, or yearly reports.

Arbeitszeitbericht

TAGESBERICHT

WOCHENBERICHT

MONATSBERICHT

JAHRESBERICHT

SPALTEN WÄHLEN

Einträge pro Seite

10

Teams

Mitarbeiter

Von

26.08.2025

Bis

26.08.2025

AKTUALISIEREN

Benutzername	Datum	Arbeitszeit	Projektzeit	Istzeit	Pausenzeit	Sollzeit	Differenz	Saldo	Saldo Korrektur
Kora Adelheid	26.08.2025	00:00	00:00	00:00	00:01	05:00	-05:00	-68:59	00:00
Bill Armstrong	26.08.2025	00:00	00:00	00:00	00:00	08:00	-08:00	-1.298:46	00:00
Julie Bowens	26.08.2025	00:00	00:00	00:00	00:00	08:00	-08:00	-295:29	00:00
Fred Buyer	26.08.2025	00:00	00:00	00:00	00:00	00:00	00:00	-136:00	00:00
Fred Buyer	26.08.2025	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
James Chan	26.08.2025	00:00	00:00	00:00	00:00	08:00	-08:00	-596:57	00:00
Cathrin Fröhlich	26.08.2025	00:00	00:00	00:00	00:00	08:00	-08:00	802:00	00:00
Bernhard Heinrich	26.08.2025	08:00	00:00	08:00	00:30	07:00	01:00	-111:00	00:00
George Keeng	26.08.2025	00:00	00:00	00:00	00:00	00:00	00:00	-849:55	00:00
Robert Leitner	26.08.2025	00:00	00:00	00:00	00:00	08:00	-08:00	-54:59	-10:00

< 1 2 >

Report Types

Report Type	Description
Daily Report	Displays working times for a specific date.
Weekly Report	Aggregated view of working times per employee within a calendar week.
Monthly Report	Overview of working times within a selected month.
Yearly Report	Summarized evaluation for an entire year.

Filters & Options

Field	Description
Teams	Filter by teams or groups.
Employees	Selection of one or multiple employees.
Period (From / To)	Restricts the display to a specific date or time range.
Select Columns	Customize which columns are visible in the report.
Refresh	Executes the query with the selected parameters.

Column Overview (Daily Report)

Column	Explanation
Username	Name of the employee.
Date	Selected report date.
Working Time	Total recorded working time.
Project Time	Time booked on projects.
Actual Time	Actually recorded time (including deviations).
Break Time	Total break time of the employee.
Target Time	Expected working time according to the employee's time model.
Difference	Deviation between target and actual time (red = minus, green = plus).
Balance	Cumulative time balance of the employee.
Balance Correction	Manually applied corrections to the time balance.

Notes

- Differences are color-coded (red = underperformance, green = overperformance, grey =

balanced).

- Additional information can be shown or hidden via **Select Columns**.
- Results can be exported (e.g., as CSV/Excel file, if configured).

From:

<https://docs.cobisoft.de/wiki/> - **COBISOFT Documentation**

Permanent link:

<https://docs.cobisoft.de/wiki/en/cobi.time/manual/manager?rev=1784793615>

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