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.

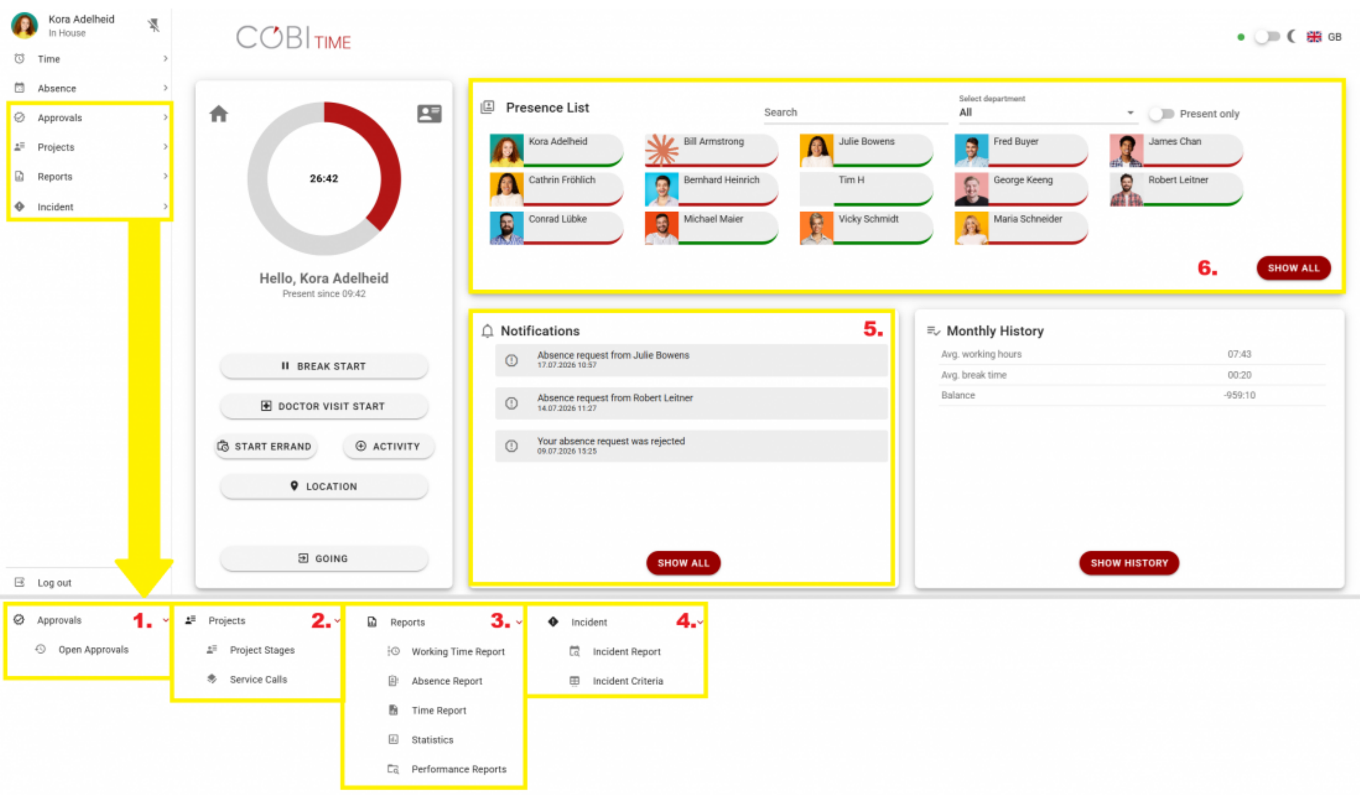
The modules for the supervisor/manager function are activated by the administrator via the user rights administration.

This manual covers the following additional modules:

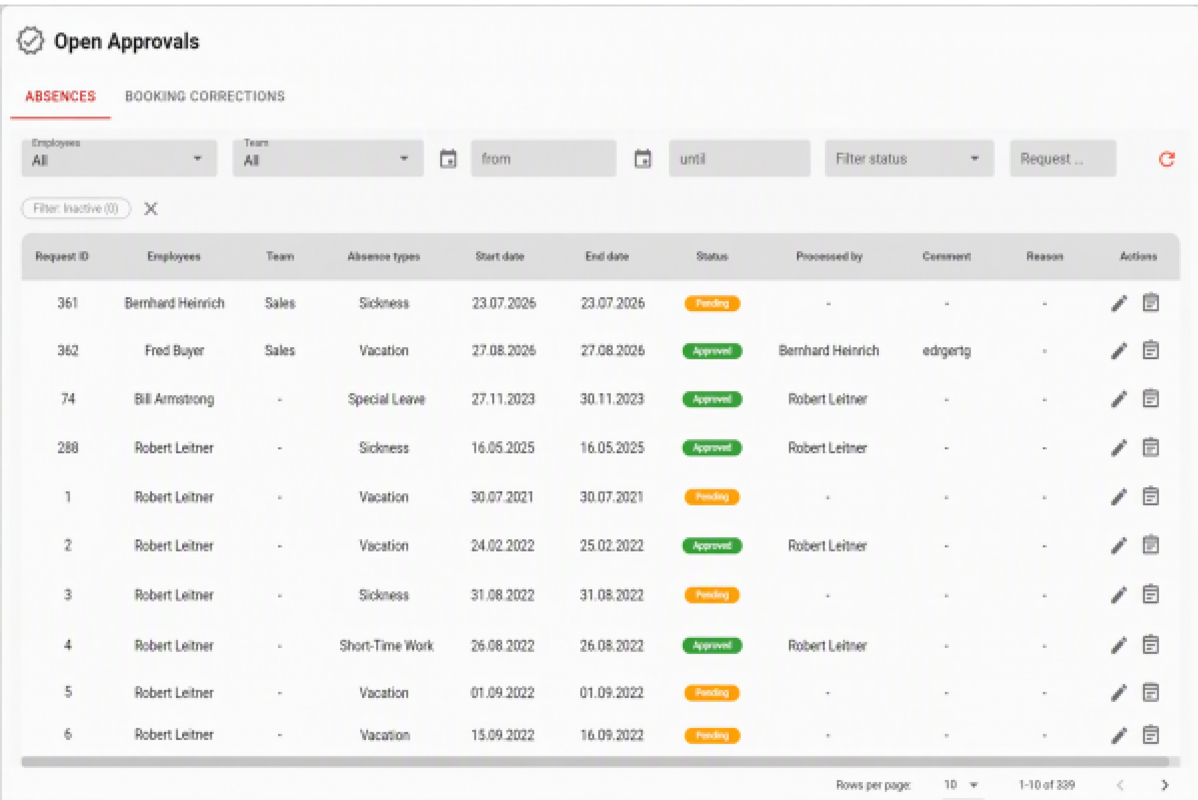
- Approvals
  - Open Approvals
- Projects
  - Project Stages
  - Service Calls
- Reports
  - Working Time Reports
  - Absence Report
  - Time Report
  - Statistics
  - Performance Reports
- Incident
  - Incident Report
  - Incident Criteria
- Notifications
- Presence list
- Absence overview

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.



1.Open Approvals



Request ID	Employees	Team	Absence types	Start date	End date	Status	Processed by	Comment	Reason	Actions
361	Bernhard Heinrich	Sales	Sickness	23.07.2026	23.07.2026	Pending	-	-	-	
362	Fred Buyer	Sales	Vacation	27.08.2026	27.08.2026	Approved	Bernhard Heinrich	edrgertg	-	
74	Bill Armstrong	-	Special Leave	27.11.2023	30.11.2023	Approved	Robert Leitner	-	-	
288	Robert Leitner	-	Sickness	16.05.2025	16.05.2025	Approved	Robert Leitner	-	-	
1	Robert Leitner	-	Vacation	30.07.2021	30.07.2021	Pending	-	-	-	
2	Robert Leitner	-	Vacation	24.02.2022	25.02.2022	Approved	Robert Leitner	-	-	
3	Robert Leitner	-	Sickness	31.08.2022	31.08.2022	Pending	-	-	-	
4	Robert Leitner	-	Short-Time Work	26.08.2022	26.08.2022	Approved	Robert Leitner	-	-	
5	Robert Leitner	-	Vacation	01.09.2022	01.09.2022	Pending	-	-	-	
6	Robert Leitner	-	Vacation	15.09.2022	16.09.2022	Pending	-	-	-	

The Open Approvals section allows authorized users to review, approve, and reject absence requests submitted by employees.
The overview displays all available requests, including employee information, team, absence type, requested period, status, and processing information.

Filter Options

The filter area can be used to narrow down the displayed requests.

Employee
Filters requests for a specific employee.

Team
Filters requests for a specific team.

From / Until
Limits the displayed requests to a specific date range.

Status
Filters requests by status.

Examples:

- Pending
- Approved
- Declined
- Cancelled

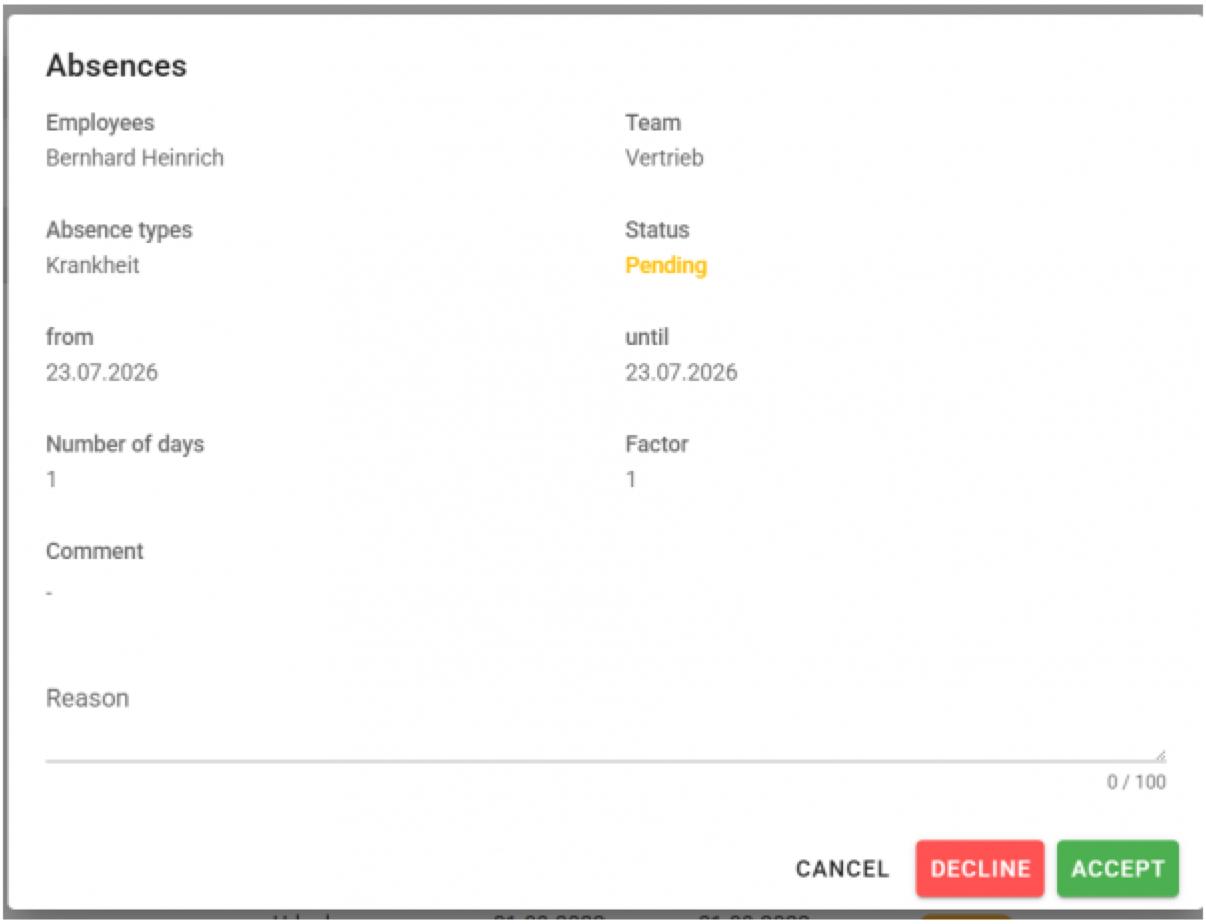
Request Type
Filters requests by absence type.

Examples:

- Vacation
- Sickness
- Special Leave
- Short-Time Work

Reviewing a Request

A request can be opened by clicking the **Edit** icon in the action column.



The request details include information such as:

- Employee
- Team
- Absence Type
- Status
- Start Date
- End Date
- Number of Days
- Factor
- Comment
- Reason

Approving a Request

Click the Accept button to approve an absence request.
Once approved, the request status is updated accordingly.
The employee will automatically receive a notification within the COBI.time dashboard.

Declining a Request

Click the Decline button to reject an absence request. An optional reason can be entered before rejecting the request. After the rejection, the request status is updated accordingly. The employee will automatically receive a notification within the COBI.time dashboard.

Notifications

Whenever a request is approved or declined, COBI.time automatically creates a notification for the affected employee. The notification is displayed in the **Notifications** area of the dashboard, allowing employees to immediately see the decision regarding their request.

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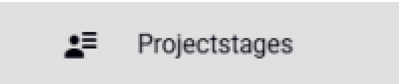
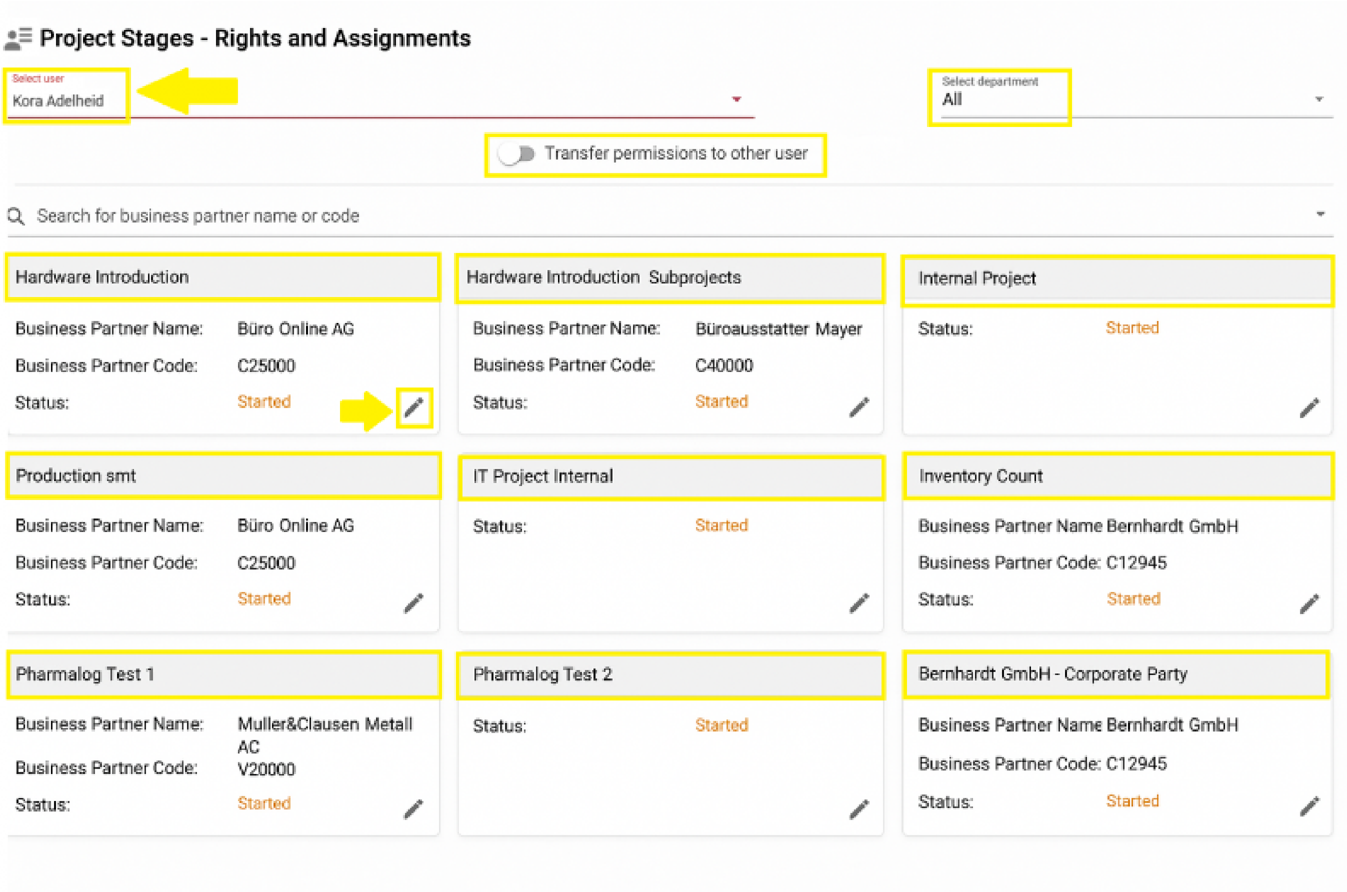
2. Project Stages – Rights and Assignments



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.



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

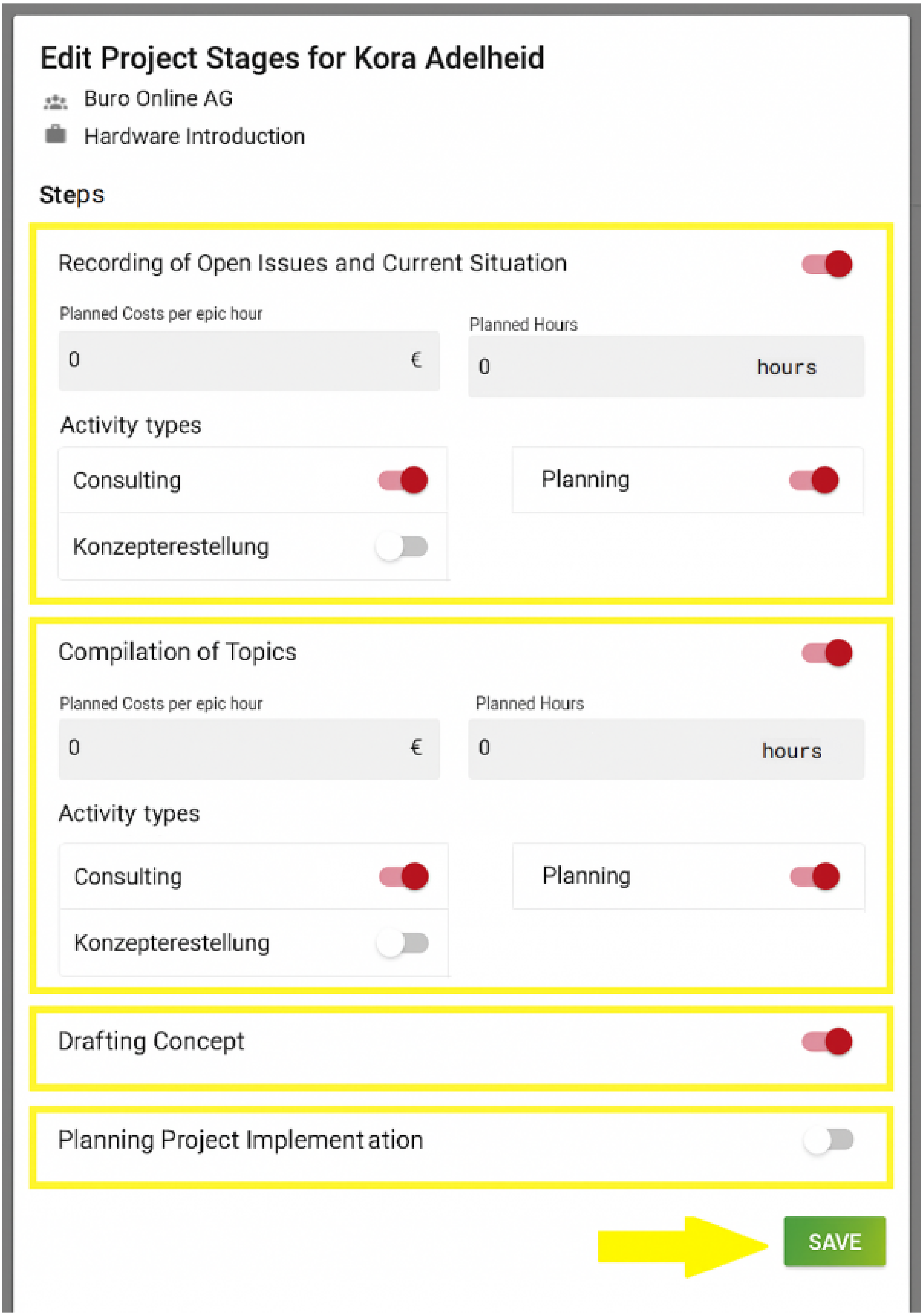
- Title: Project name (from SAP Business One).
- Business Partner Name/Code: Reference to the associated BP.
- Status: Project status (e.g., Started).
- Edit (Pencil): Opens the detailed editing view.

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.



Layout of the Interface

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

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

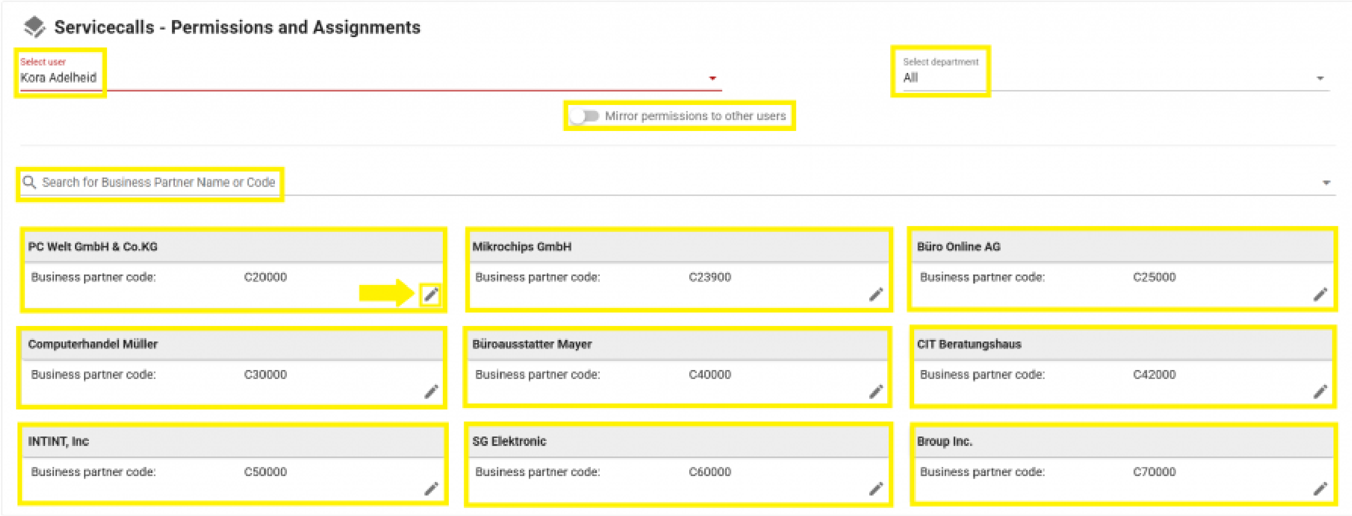
- Inactive stages will not appear for the user in COBI.time.
- Changes take effect immediately after saving – the user may need to re-log into COBI.time.
- Multiple activity types can be activated simultaneously.

2.1 Service Calls – Rights and Assignments

Target Group: Service Managers, Project Managers, Team Leaders, Support Managers
Purpose: Review and manage employee permissions, service calls, and activity types.

The Service Calls – Rights and Assignments module allows you to manage employee assignments to individual service calls.

Service calls are imported directly from the SAP Business One service module and displayed within COBI.time.



Prerequisites

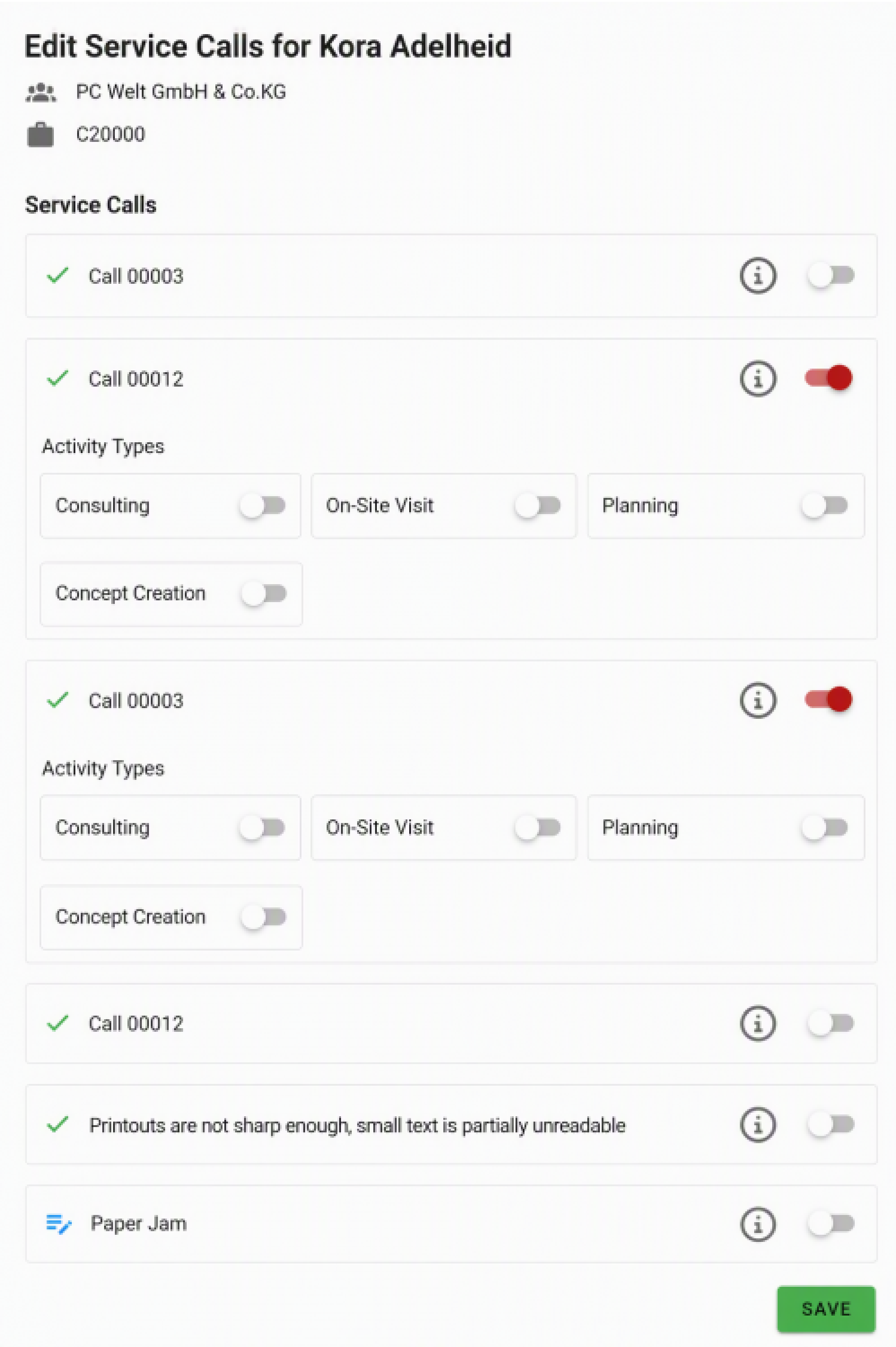
- Service calls have been created and are active in SAP Business One.
- The user has a valid COBI.time license.
- You have permission to manage rights and assignments within COBI.time.

Step-by-Step

1. Select User: Choose the desired employee using the Select User field.
2. (Optional) Filter by Department: Restrict the view to service calls belonging to a specific department.
3. Search for a Service Call: Use the search function (Customer Name or Business Partner Code).
4. Open a Service Call: Click the pencil icon on the corresponding service call card.
5. Adjust Rights & Assignments: Enable or disable individual service calls as well as the allowed activity types.
6. Save: Confirm your changes by clicking SAVE.

Fields in the Overview

- **Business Partner Name & Code:** Reference data imported from SAP Business One.
- **Service Calls:** Displayed as individual cards, each with a unique call number.
- **Pencil Icon (Edit):** Opens the detailed permission management view.



Service Call Detail View

Area	Function
Service Call (Call Number)	Unique identifier of the service call (e.g. Call 00012).
Activity Types (Toggle Switches)	Define which activity types are allowed for this service call (e.g. *Consulting*, On-Site Visit, Planning).
Information Icon (i)	Displays additional details or issue descriptions related to the service call (e.g. Paper Jam).

Area	Function
Service Call Activation (Right Toggle)	Enables or disables the service call for the selected employee.
SAVE Button	Saves all changes made within the service call.

Example: Service Call 00012

- Activity Type Consulting disabled.
- Activity Type On-Site Visit enabled.
- Activity Type Planning disabled.

Result:

The employee is only allowed to book time against the activity type On-Site Visit for this service call.

Notes

- Disabled service calls are not visible to the employee within COBI.time.
- Activity types can be configured individually for each service call.
- Changes take effect immediately after saving.
- Additional information about a service call can be accessed via the Information Icon (i), such as:
  - Service Call Creation Date
  - Service Call ID
  - Service Call Start Date
  - Additional notes or issue descriptions

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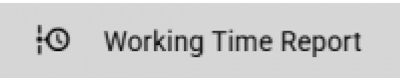
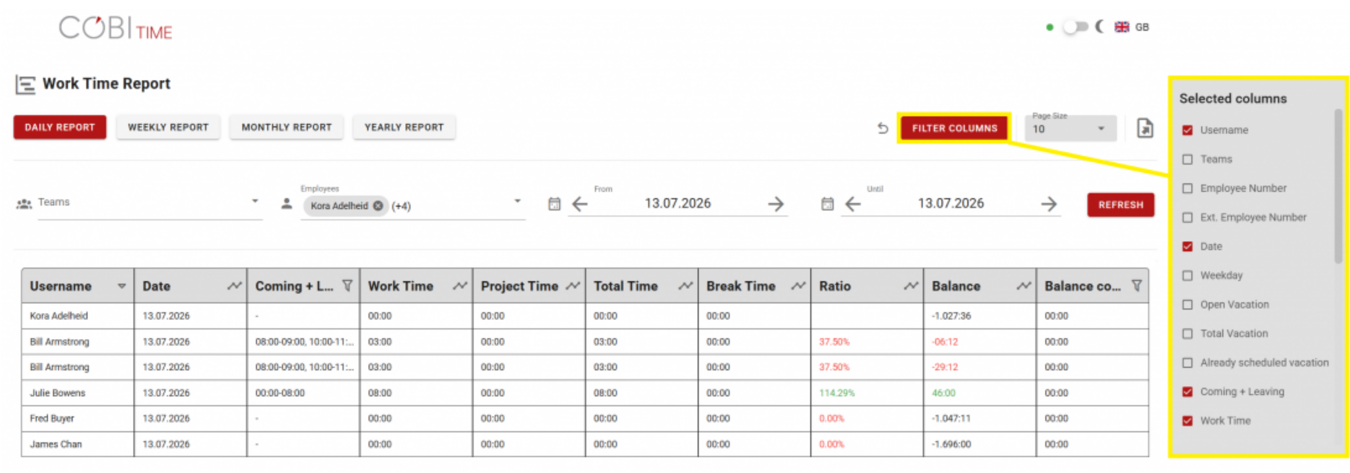
3. Reporting – Working Time



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.



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)

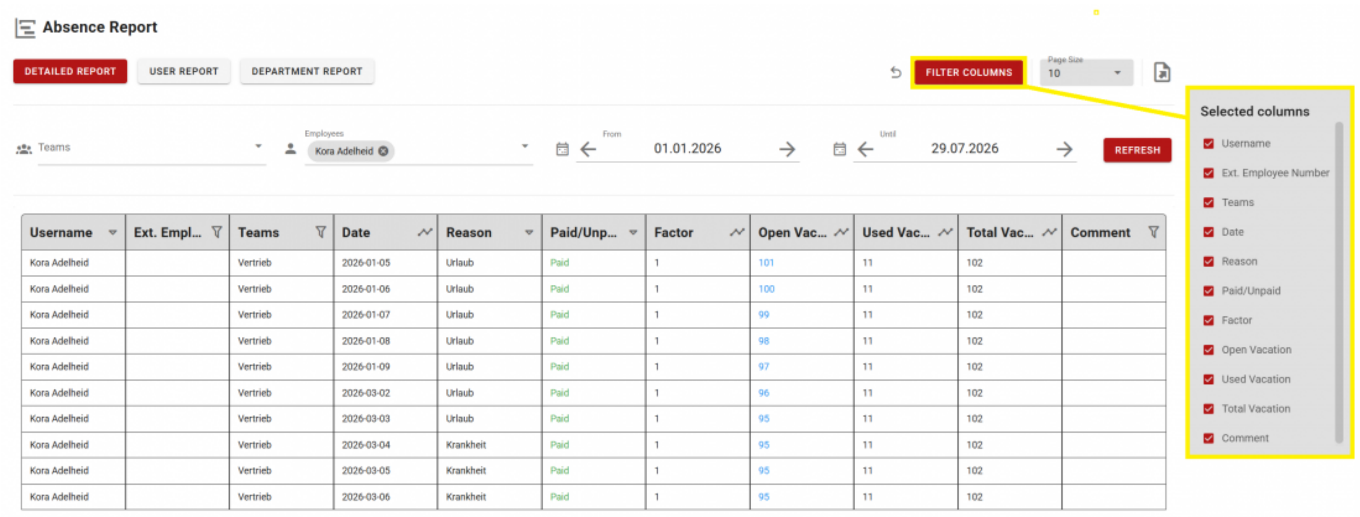
Column	Explanation
Username	Name of the employee.
Date	Selected report date.
Working Time	Total recorded working time.
Project Time	Time booked on projects.
Actual Time	Actually recorded time (including deviations).
Break Time	Total break time of the employee.
Target Time	Expected working time according 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).

Absence Report



The Absence Report provides a detailed overview of all recorded absences within a selected period. Using various filter and grouping options, absences can be analyzed for individual employees, teams, or entire departments.

Available Reports

Several report types are available at the top of the screen.

Detailed Report
Displays all absence entries individually within the selected period.

User Report
Summarizes absence information per employee and provides aggregated values.

Department Report
Displays absence statistics grouped by department.

Filter Options

The displayed data can be filtered using various criteria.

Teams
Filters the report by one or more teams.

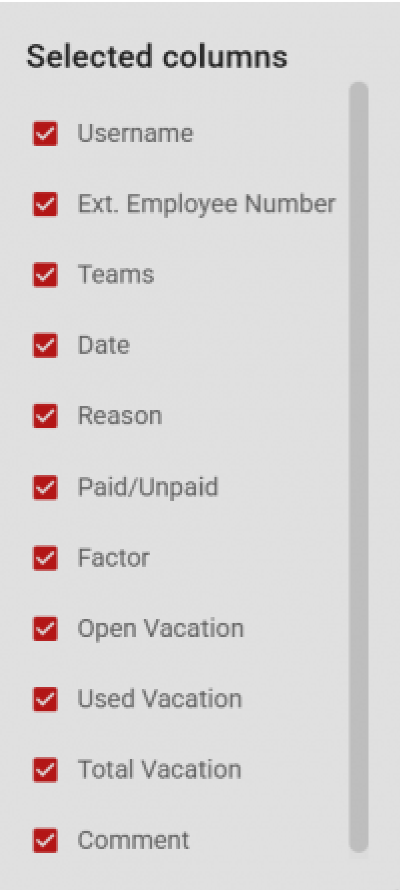
Employees
Displays absences for selected employees.

From / Until
Defines the reporting period.

Refresh
Reloads the report using the selected filter settings.

Column Selection

The Select Columns button allows users to define which information should be displayed within the report.



Available columns include:

- User Name
- External Employee Number
- Team
- Date
- Reason
- Paid / Unpaid
- Factor
- Remaining Vacation
- Approved Vacation
- Vacation Entitlement
- Comment

The selected columns are immediately applied to the report view.

Available Information

Depending on the selected columns, the report may contain the following information:

User Name
Employee name.

External Employee Number
External employee identification number.

Team
Team assignment of the employee.

Date
Date of the absence entry.

Reason
Type of absence.

Examples:

- Vacation
- Sickness
- Special Leave
- Short-Time Work

Paid / Unpaid
Indicates whether the absence is paid or unpaid.

Factor
Absence factor.

Typical values:

- 1 = Full Day
- 0.5 = Half Day

Remaining Vacation
Remaining vacation entitlement after the absence entry.

Approved Vacation
Already approved vacation days.

Vacation Entitlement
Total vacation entitlement of the employee.

Comment
Optional comment entered for the absence.

Export Function

The export button can be used to export the currently displayed report. All active filters and selected columns are included in the export. Typical use cases include:

- HR departments
- Team evaluations
- Vacation overviews
- Sickness statistics
- Internal documentation

Use Cases

The Absence Report can be used for:

- Reviewing vacation bookings
- Analyzing sickness absences
- Monitoring remaining vacation balances
- Evaluating absences by team
- Supporting workforce planning
- Exporting absence data for further analysis

Time report

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

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

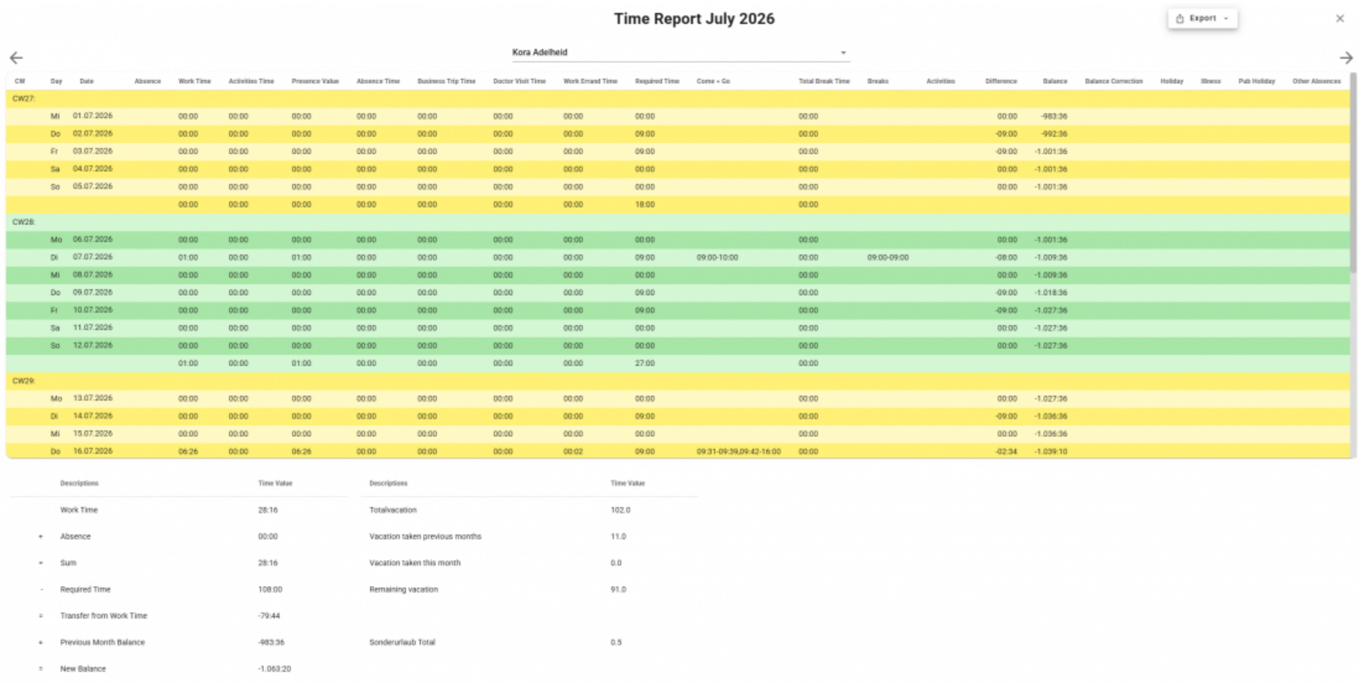
In the second option, a list of all employees is displayed, from which you can select one or more employees. Deactivated employees are not displayed for selection.

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:



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.

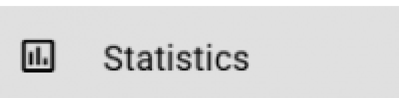
In addition, you can use the two “Export” buttons at the top right to import the reports into an Excel file for further processing, for example to make them available to a tax office.

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.

Statistics



The Statistics module provides managers and administrators with a centralized overview of important company KPIs. Statistics can be generated for specific periods, teams, departments, or the entire company, making it easier to identify trends and analyze workforce-related metrics.

Filter Options

The filter area can be used to customize the displayed statistics.

Evaluation Mode
Defines the period used for the calculation.

Examples:

- Monthly
- Yearly

Month
Specifies the month to be evaluated.

Year
Specifies the year to be evaluated.

Scope
Defines the organizational scope for the calculation.

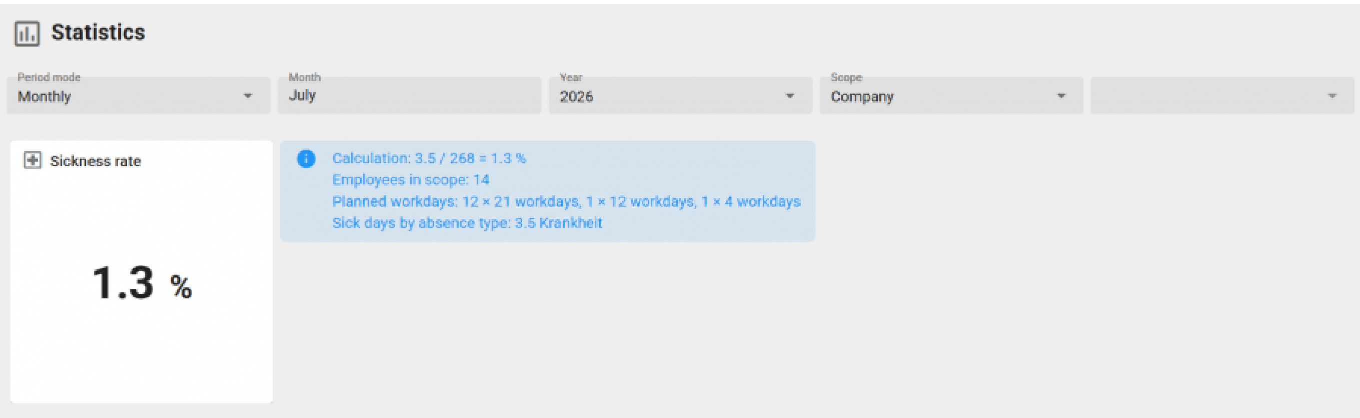
Examples:

- Entire Company
- Team
- Department

Statistics are recalculated automatically based on the selected filters.

Sickness Rate

The Sickness Rate KPI displays the percentage of sickness-related absences within the selected period.



The calculation is based on:

- Number of employees within the selected scope
- Planned working days
- Recorded sickness days
- The absence type configured for sickness rate calculations in the system settings

The resulting value is displayed as a percentage.

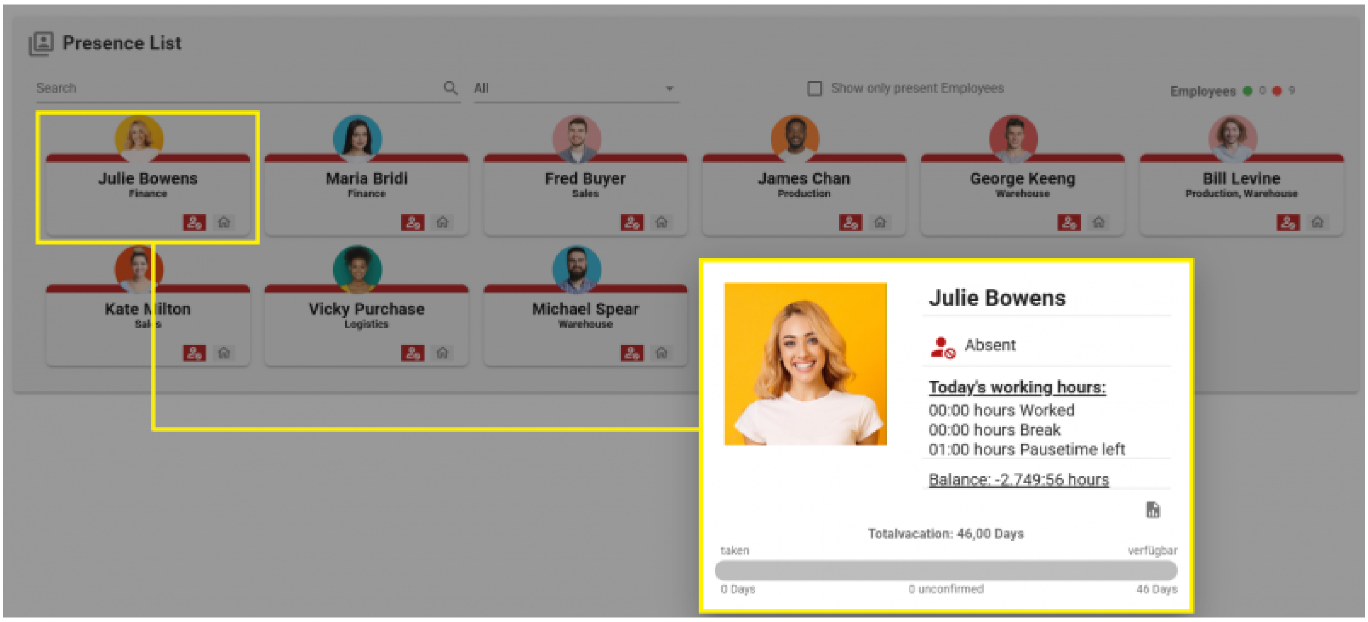
Example:

Calculation:
3.5 sickness days / 268 working days = 1.3%

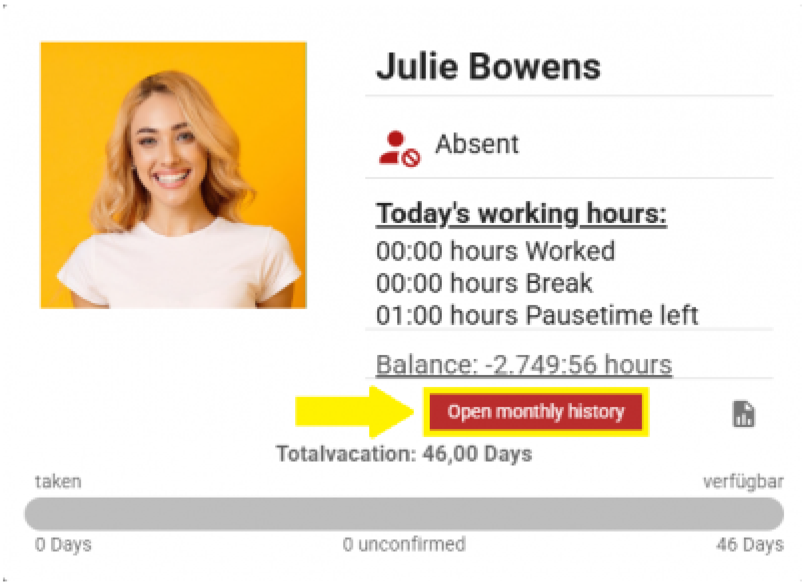
6. Presence List

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

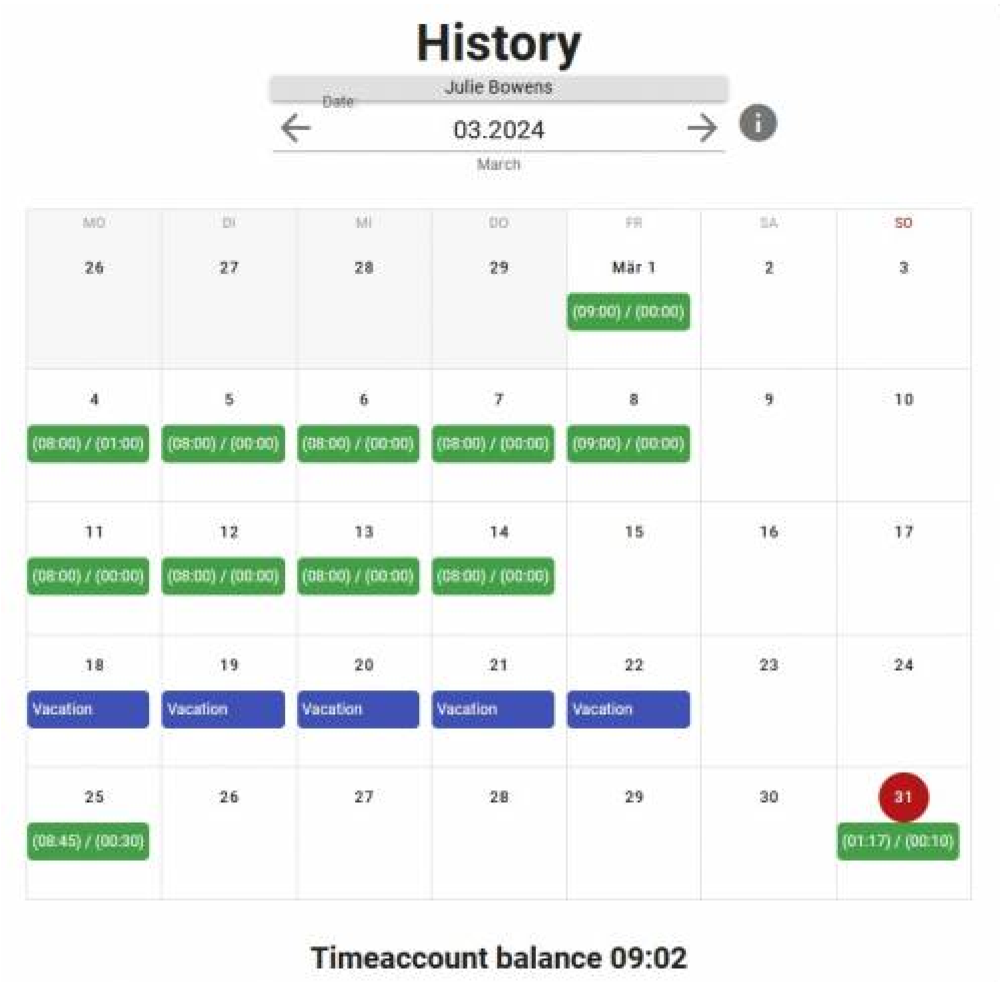
The supervisor/manager can view the following information about the employees. Clicking once on an employee opens an overview window in which you can find an overview of the current working time, the time account balance and the holiday days, see illustration below.



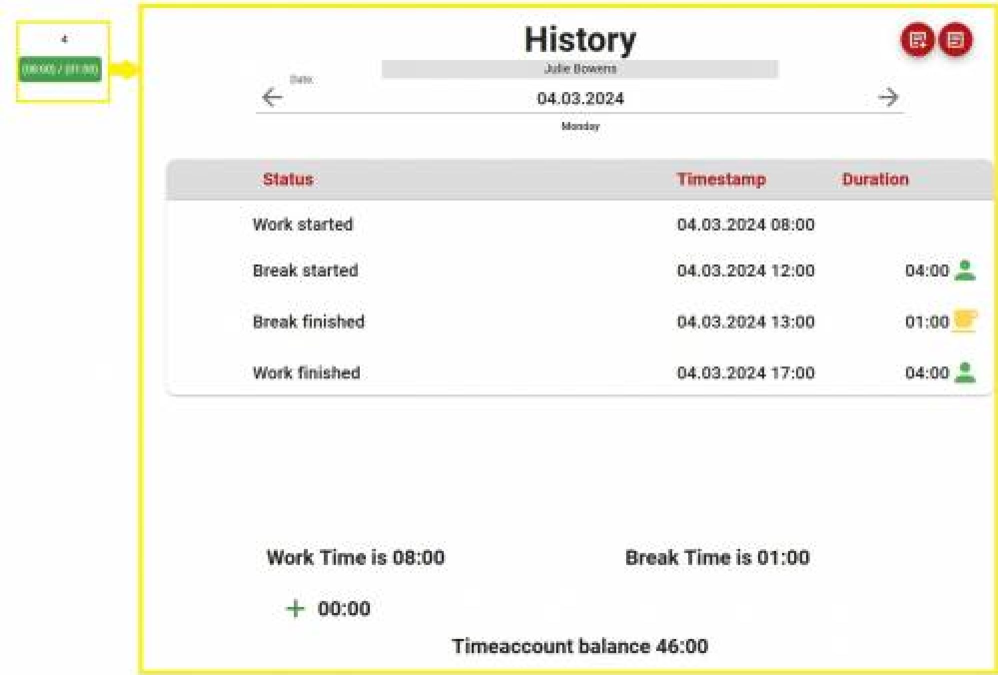
In addition, the supervisor has the option of clicking on the “Balance” to display the employee's monthly history.



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.



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



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:

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.

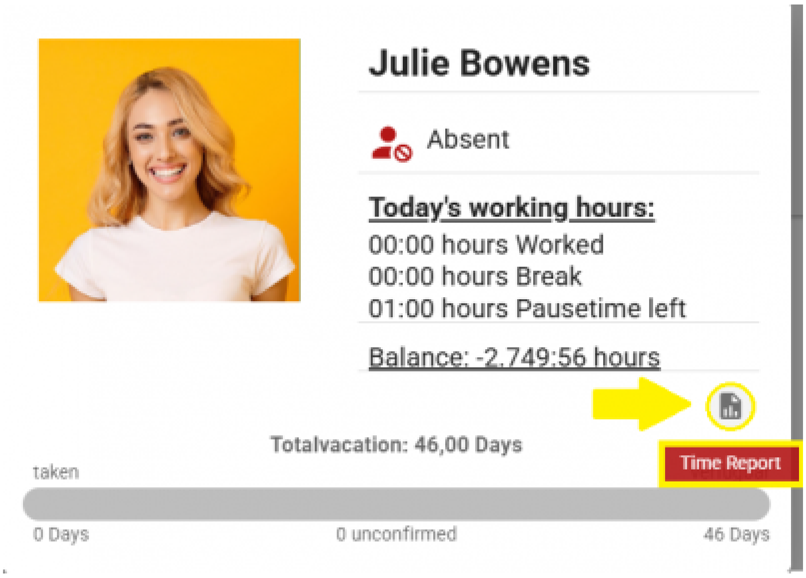
You can add lines via the “plus” if, for example, you would like to add times to a project.

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.

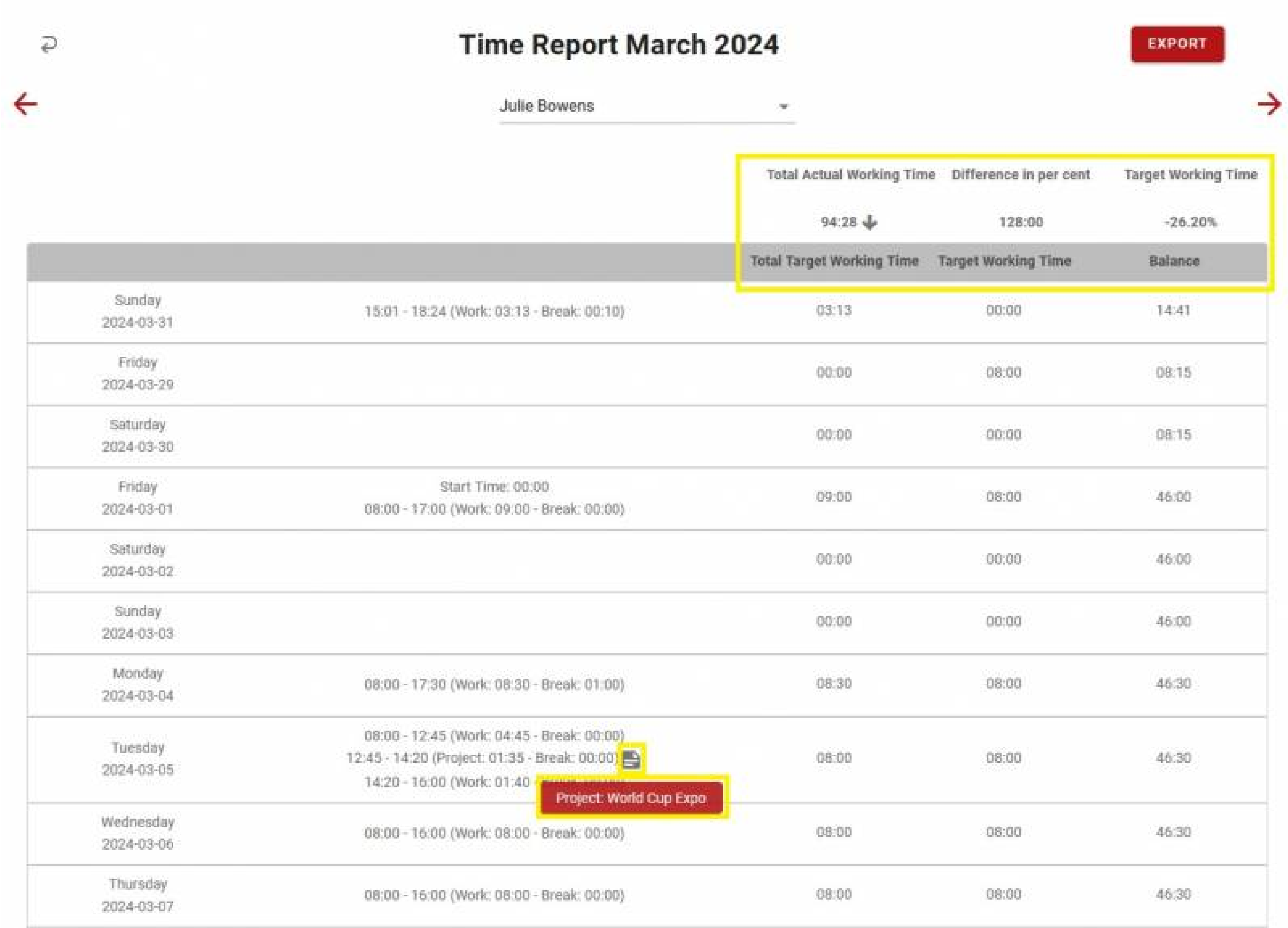
You can use the “Show comments” function at the top right to display the corresponding comments for the changes. When you click on the button, only days are displayed for selection where changes have been made; after selecting the day, for example, the following overview is displayed:

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.



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):

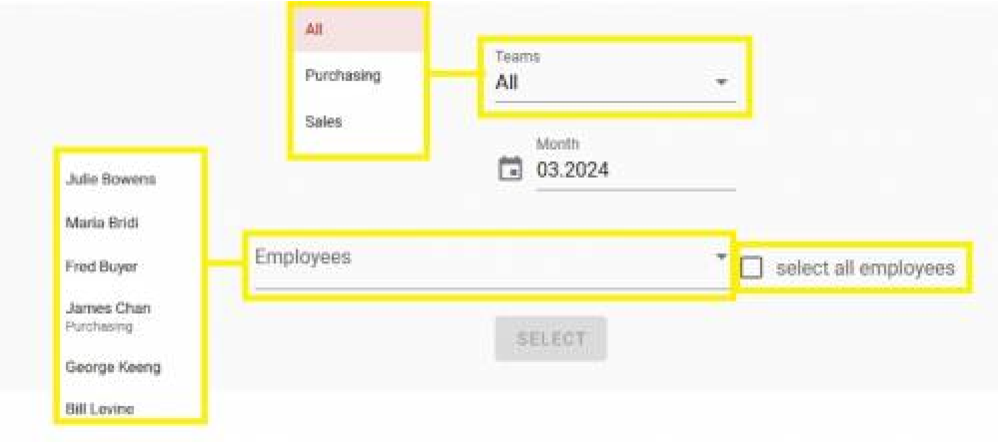


The actual and target working time, the difference in per cent and the corresponding balance are displayed. The booked times including the break are visible for the individual days. If projects have been booked, you can see these by moving the mouse pointer over the project symbol. The red arrows to 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

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.

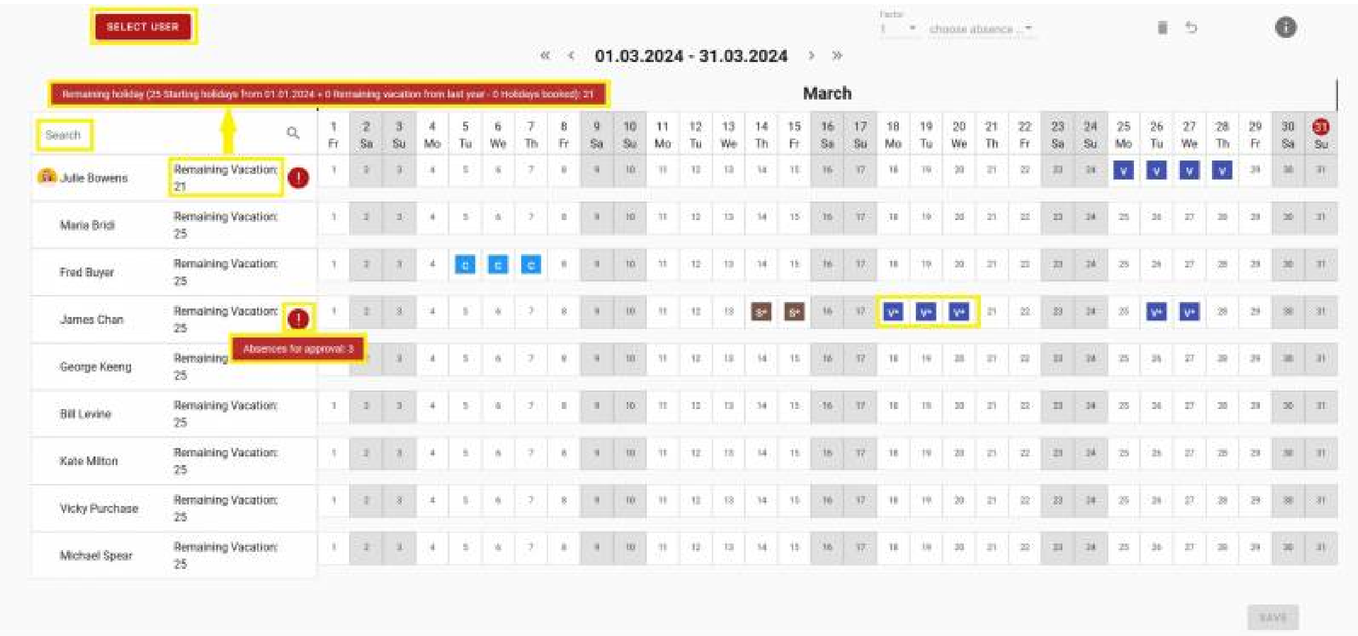
Clicking on the icon opens the following screen.



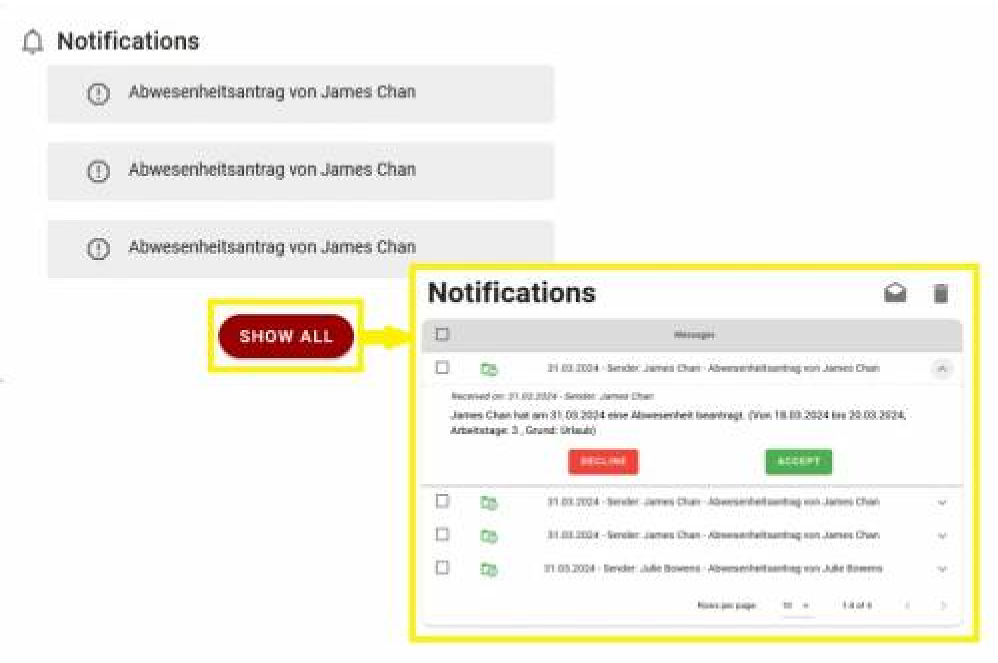
You also have the option of filtering by teams or individual employees or clicking on “All employees” to get a complete overview. If you have selected a team, the “Employees” filter only displays the employees of this team and you then have to select them either completely or individually.

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

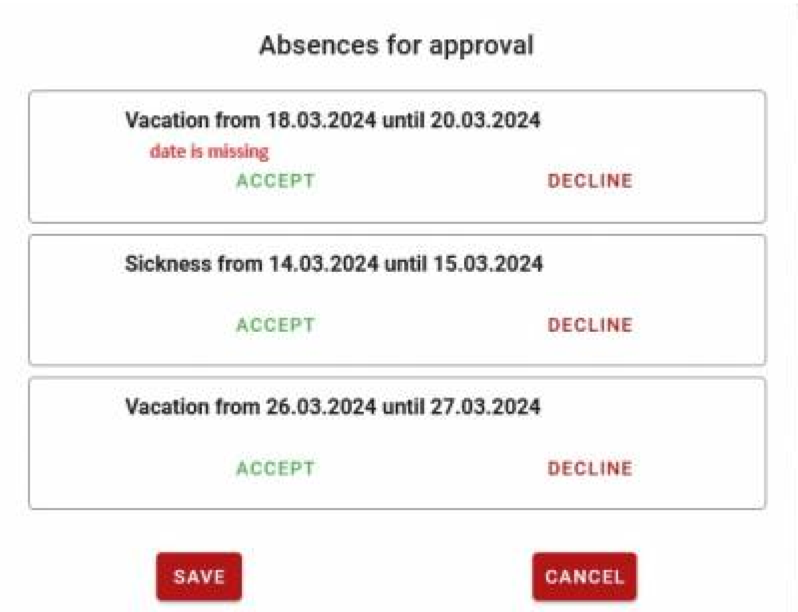
Below is an example of the view of an absence overview:



- 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.

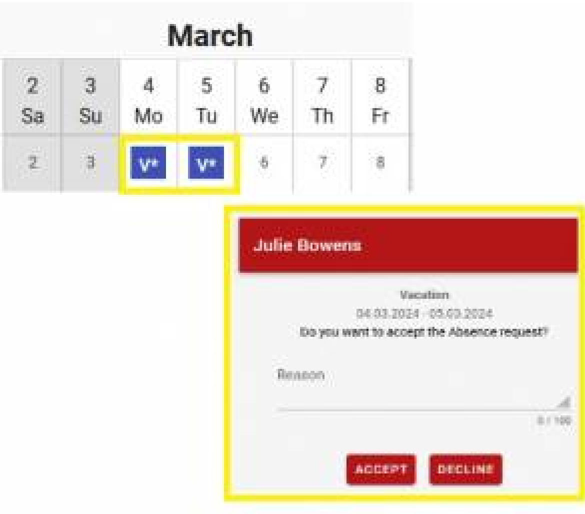


Approval/rejection of absences There are two ways to approve absence requests. Firstly, you can click on the exclamation mark icon and all of the employee's absence requests will be listed one below the other. Based on the information “Received on:” under the reason for absence, you can decide which 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



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.

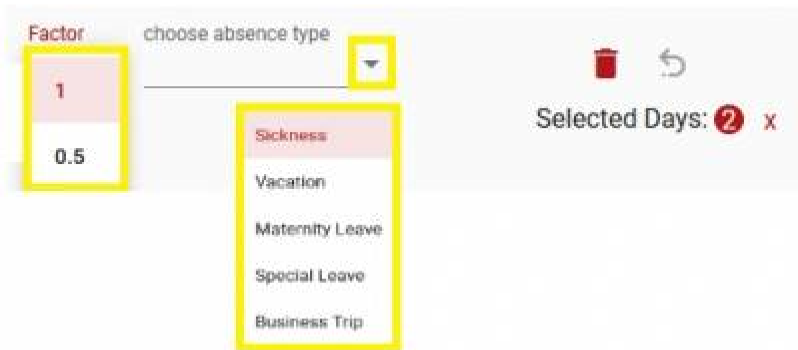


The advantage of approval via the exclamation mark symbol is that several absence requests are listed, which may not be visible in the calendar immediately if they were submitted for different months.

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.

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.

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