# 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.

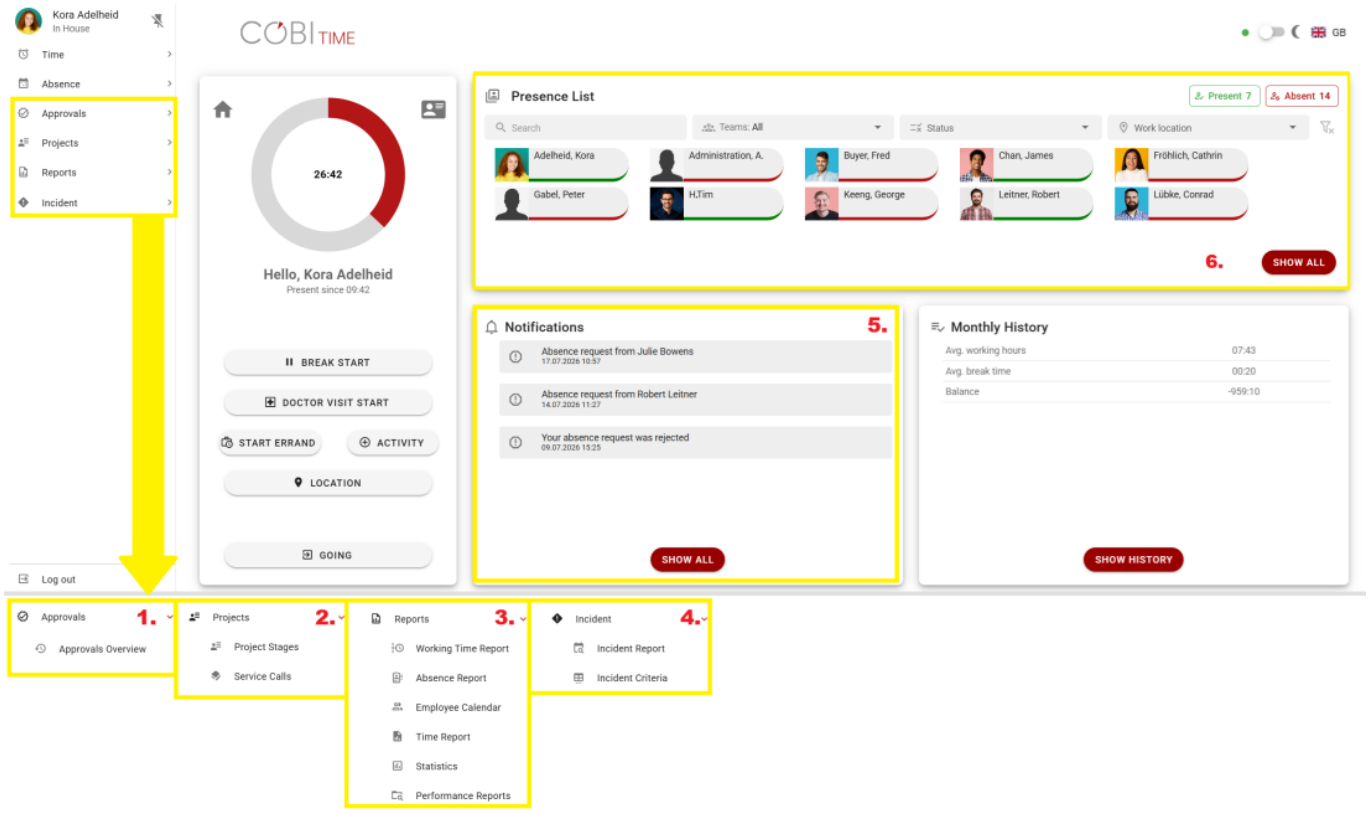
This manual covers the following additional modules:

- 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

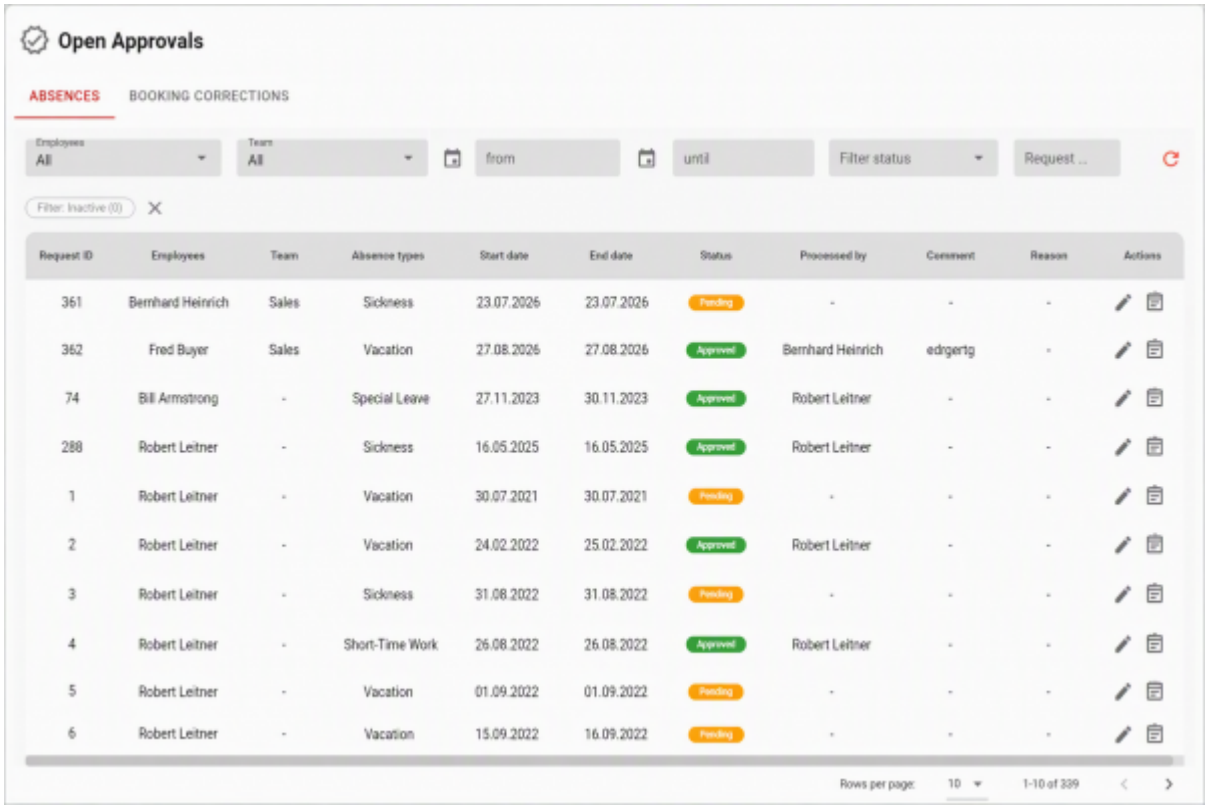
The Administration module is not covered in this user manual; please refer to the manual for the administrator.

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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




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

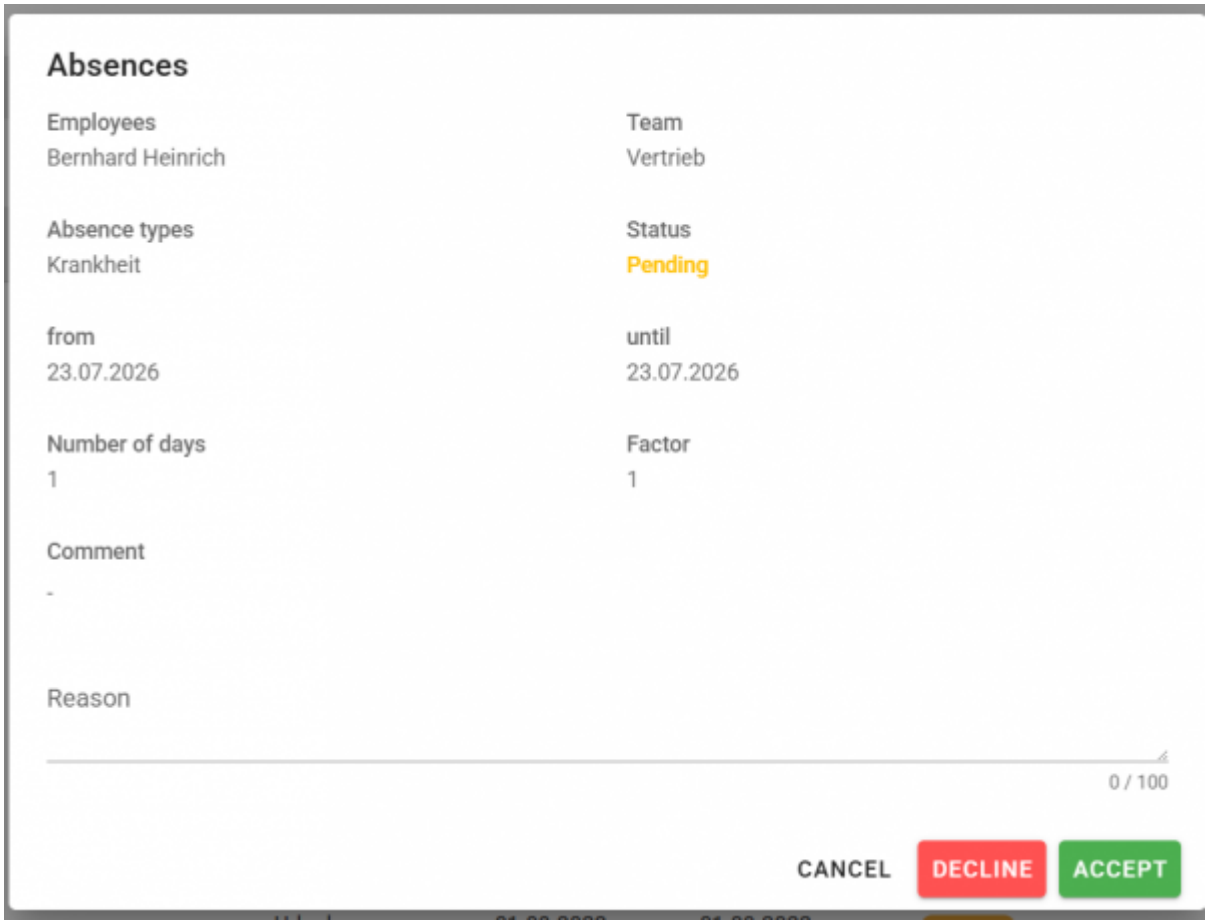
**Request Type**
Filters requests by absence type.

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

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## 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.

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## 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.

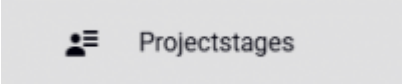
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### Notifications

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.

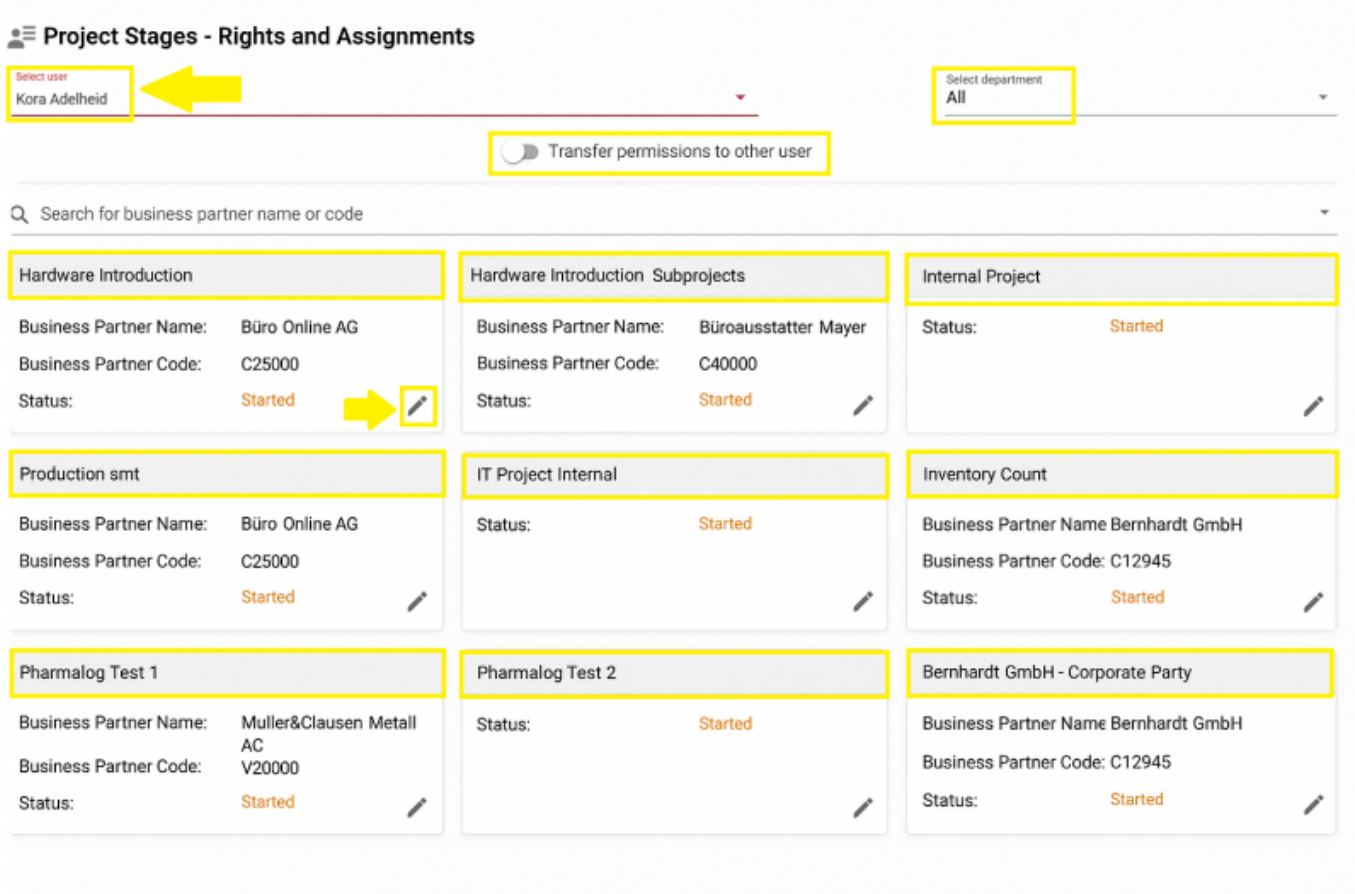
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## 2. Project Stages – Rights and Assignments




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

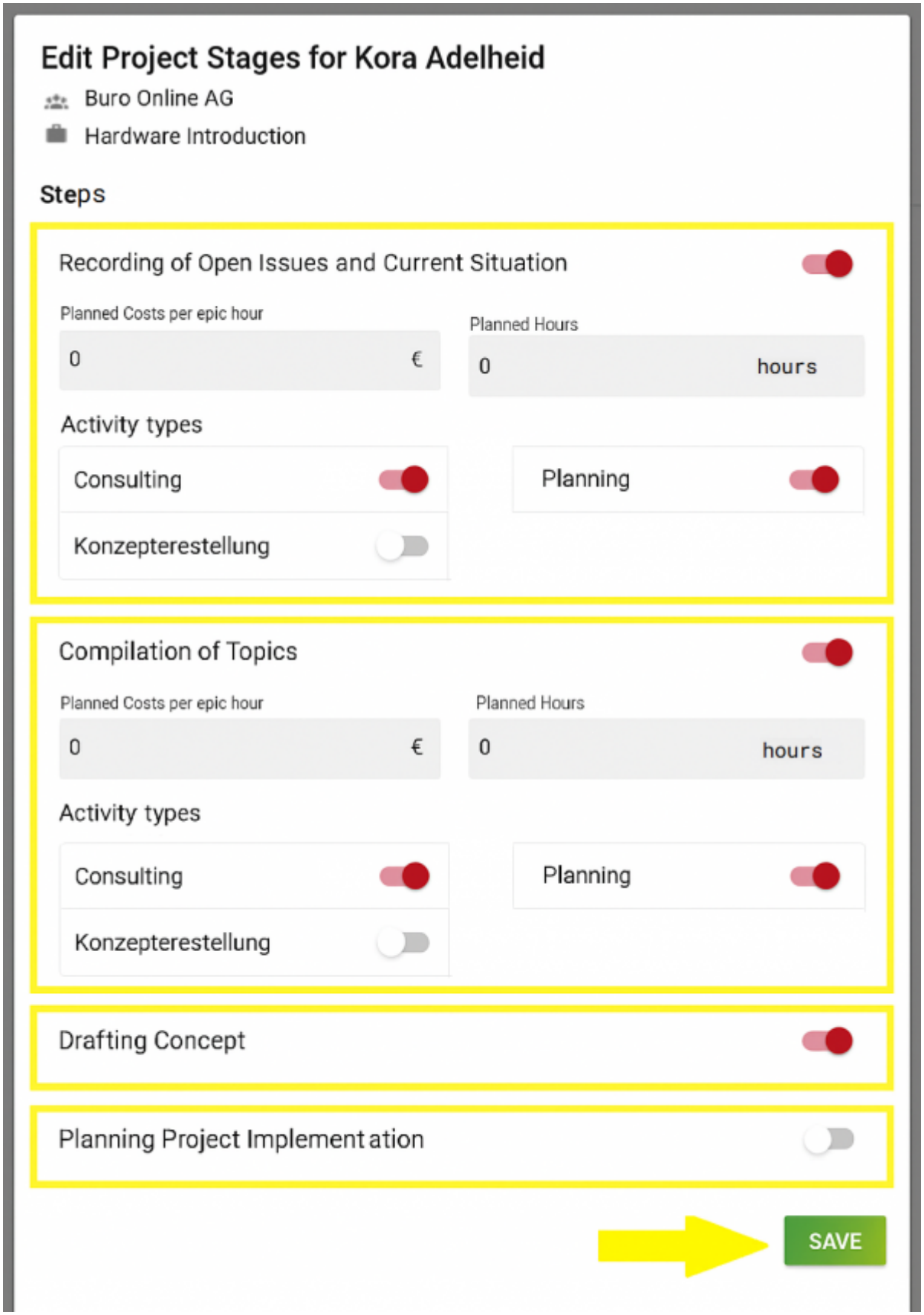
- Title: Project name (from SAP Business One).
- Business Partner Name/Code: Reference to the associated BP.
- Status: Project status (e.g., Started).
- Edit (Pencil): Opens the detailed editing view.

## 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.

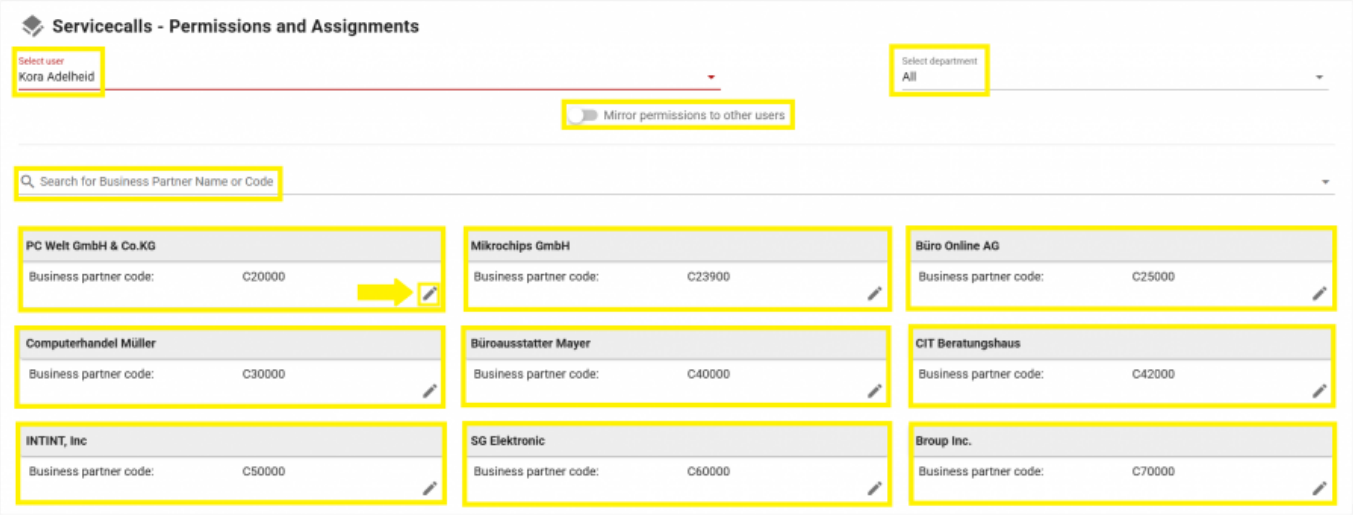
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# 2.1 Service Calls – Rights and Assignments

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

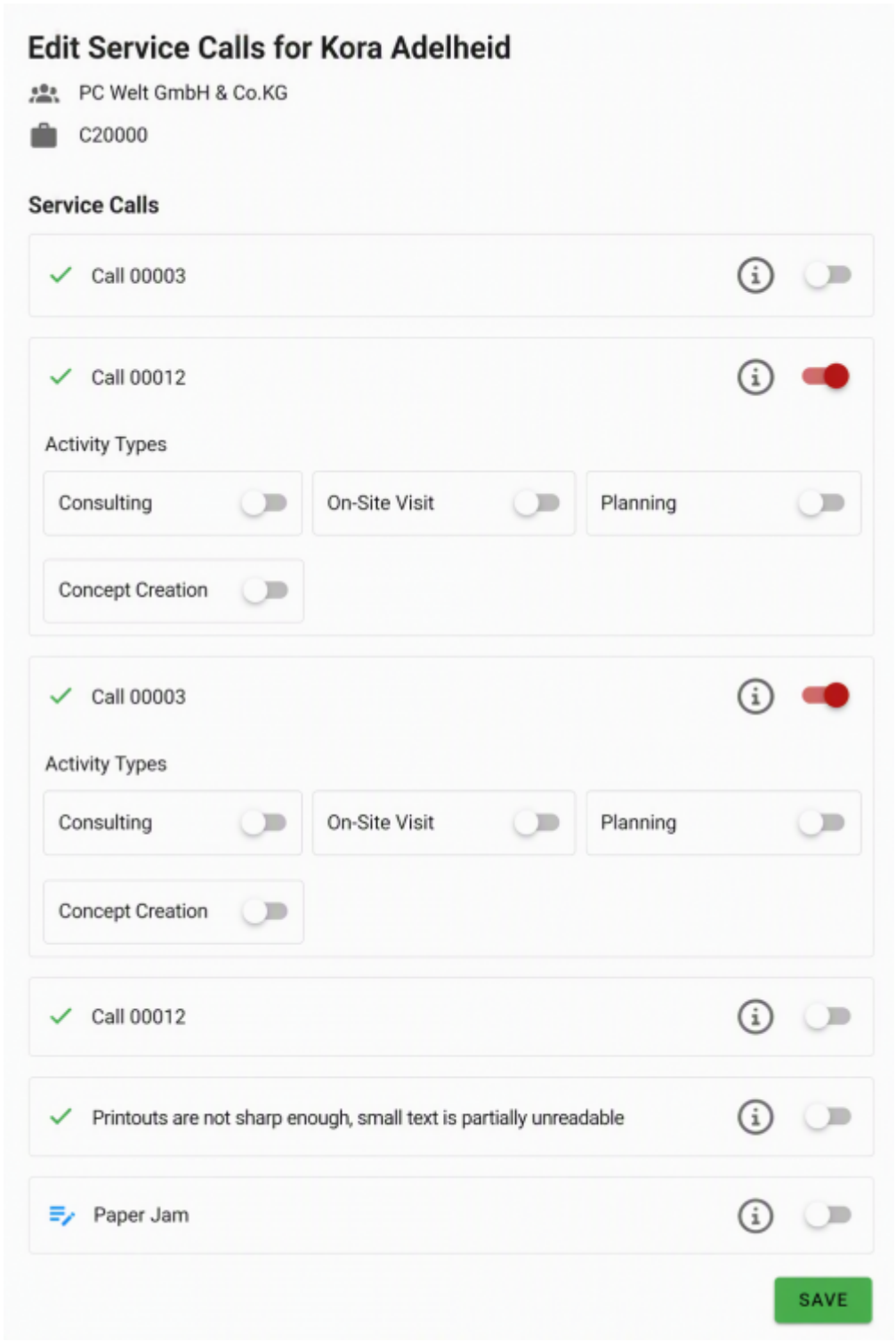
- Service calls have been created and are active in SAP Business One.
- The user has a valid COBI.time license.
- You have permission to manage rights and assignments within COBI.time.

## 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:

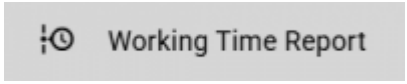
The employee is only allowed to book time against the activity type On-Site Visit for this service call.

### Notes

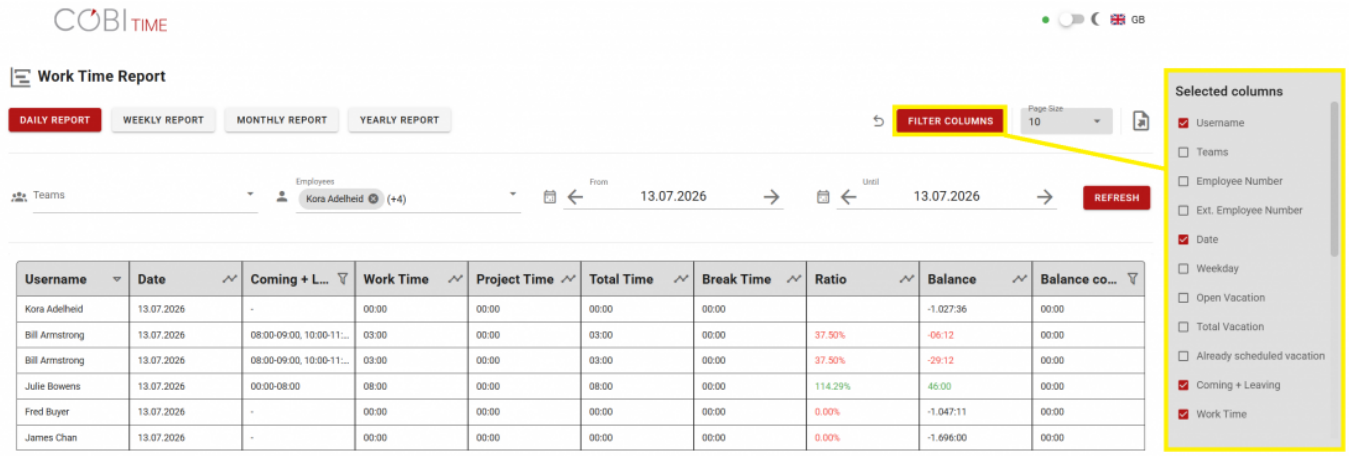
- Disabled service calls are not visible to the employee within COBI.time.
- Activity types can be configured individually for each service call.
- Changes take effect immediately after saving.
- Additional information about a service call can be accessed via the Information Icon (i), such as:
  - Service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

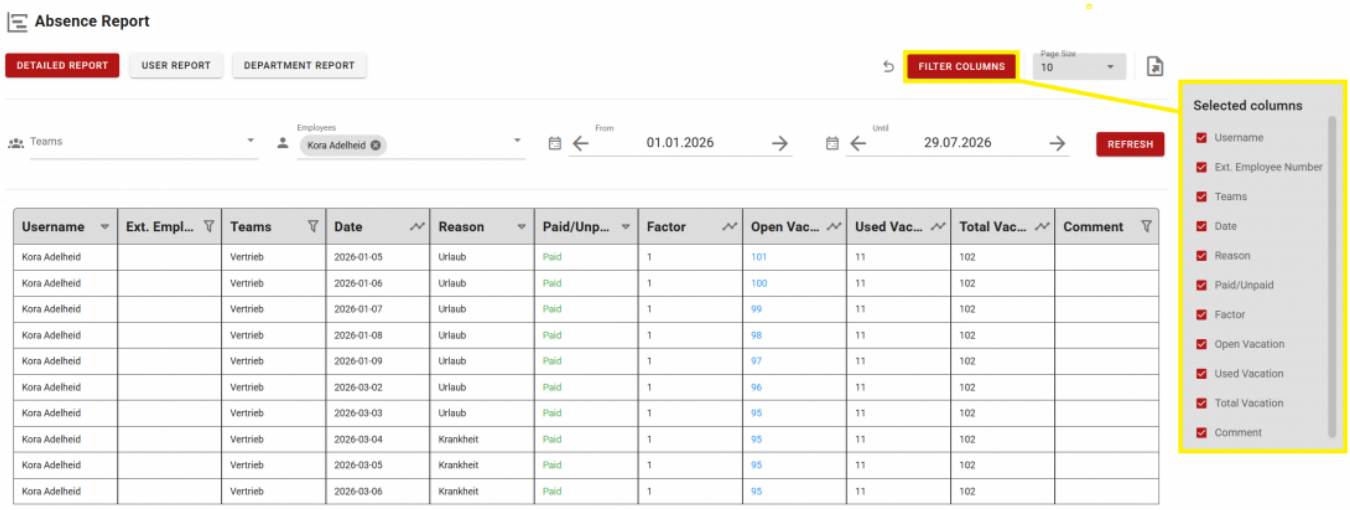
## Notes

- 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).

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# 3.1 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.

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## 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.

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## 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.

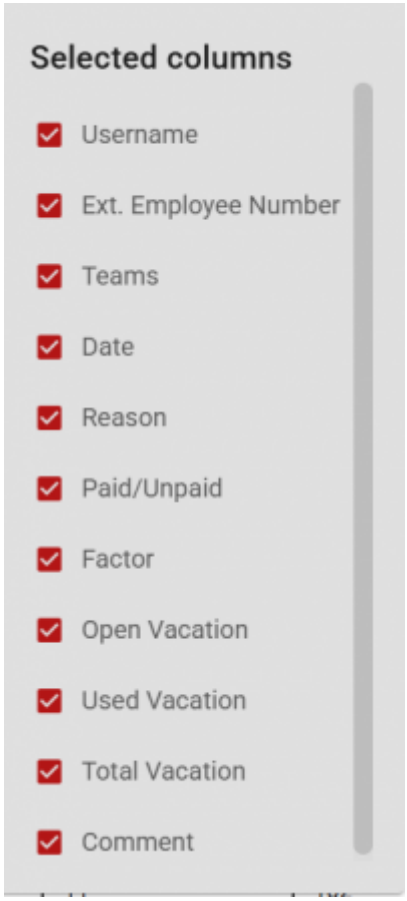
**From / Until**
Defines the reporting period.

**Refresh**
Reloads the report using the selected filter settings.

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## 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.

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## 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

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### Use Cases

The Absence Report can be used for:

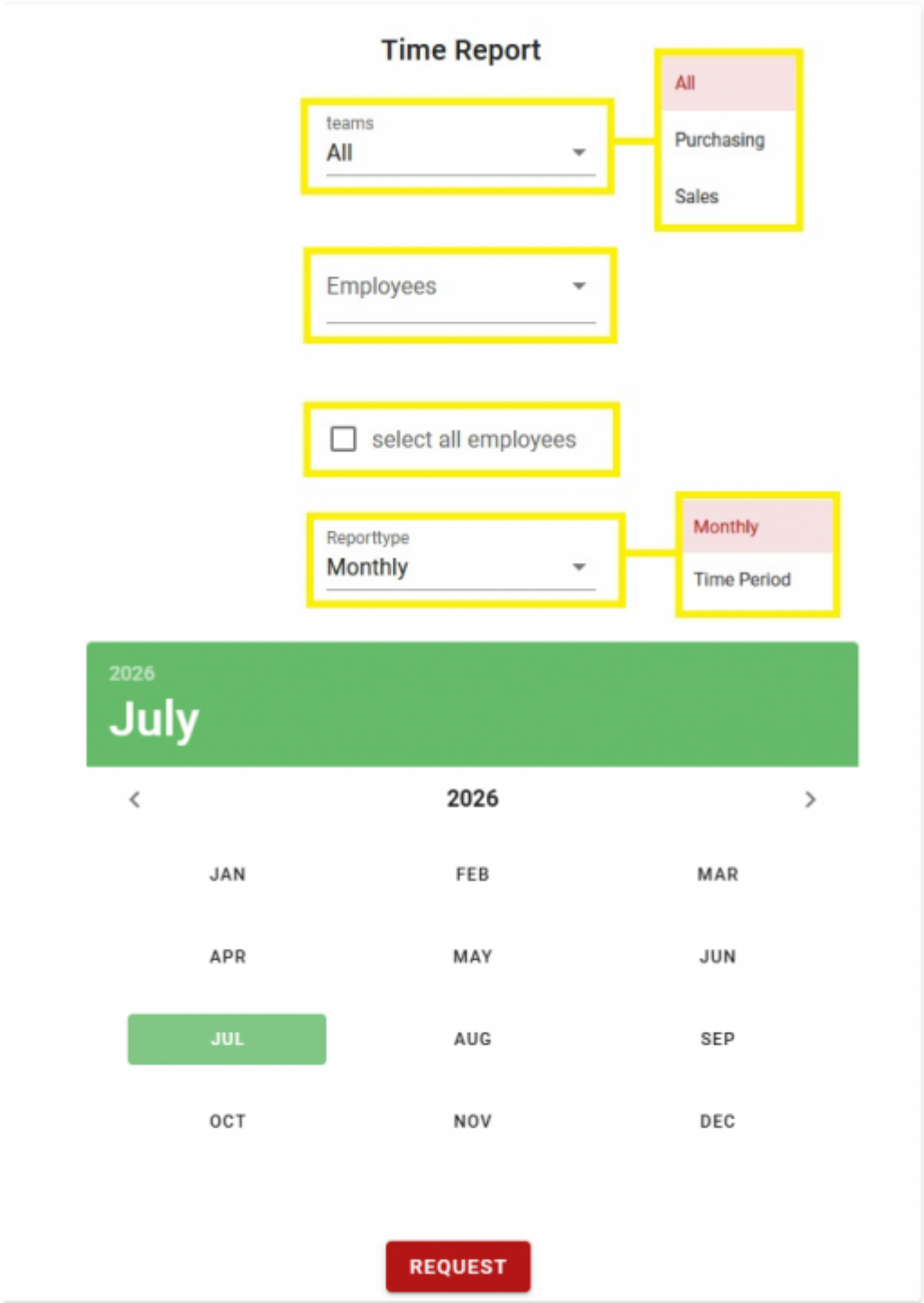
- Reviewing vacation bookings
- Analyzing sickness absences
- Monitoring remaining vacation balances
- Evaluating absences by team
- Supporting workforce planning
- Exporting absence data for further analysis

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## 3.2 Time report




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




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

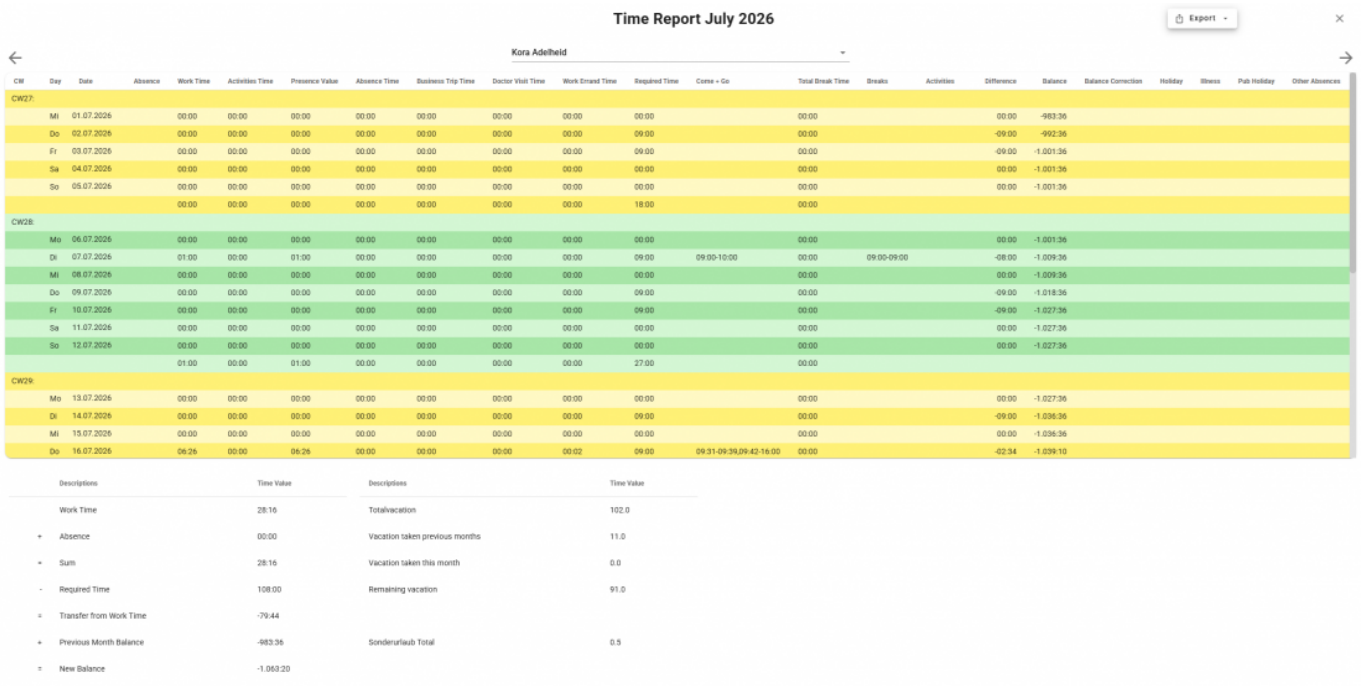
In the second option, a list of all employees is displayed, from which you can select one or more employees. Deactivated employees are not displayed for selection.

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.

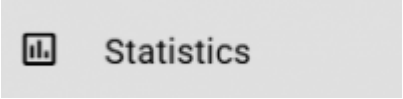
The “Export All” button imports all time reports for the employees included in the selection into an Excel file. An Excel data sheet is displayed for each employee, the names of the employees are displayed in the tab labelled below.

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.

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# 3.3 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:

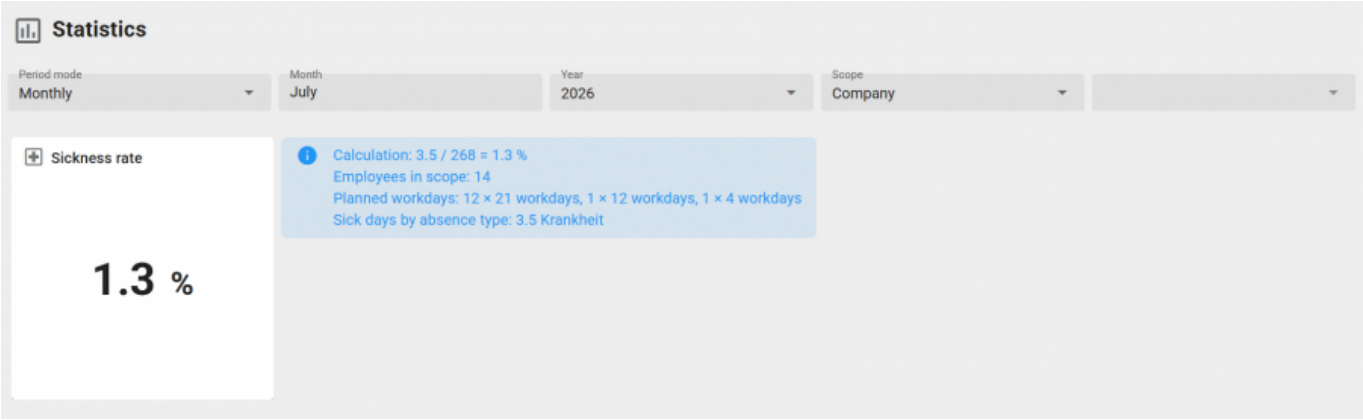
- Entire Company
- Team
- Department

Statistics are recalculated automatically based on the selected filters.

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## 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

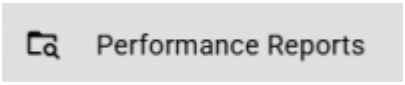
The resulting value is displayed as a percentage.

Example:

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

---

# 3.4 Performance Reports




The Performance Reports module provides detailed evaluations of recorded working times for projects, financial projects, and service calls. The reports help managers and project owners analyze effort, booked hours, and resource allocation within a selected period.

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## Available Reports

Different report types can be selected at the top of the screen.

**Project Report**
Displays all recorded times booked to project management projects.

**Financial Project Report**
Displays all recorded times booked to financial projects.

**Service Call Report**
Displays all recorded times booked to service calls.

---

## Filter Options

The displayed data can be filtered using various criteria.

**Employee**
Filters the report by one or more employees.

**Project / Financial Project / Service Call**

Filters the report by the selected object.

**From / Until**
Defines the reporting period.

**Refresh**
Reloads the report based on the selected filter settings.

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## Report Information

The report provides important performance indicators in an aggregated format.

**Project**
Name of the project, financial project, or service call.

**Activity Type**
The activity booked within the project.

Examples:

- Consulting
- On-Site Visit
- Planning
- Development

**Duration**
Total booked time within the selected period.

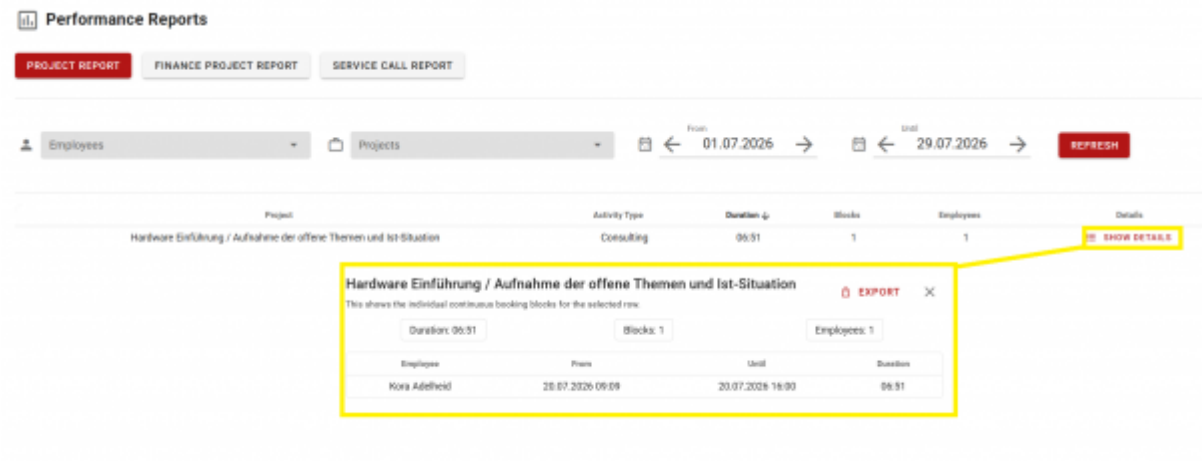
**Blocks**
Number of continuous booking blocks.

**Employees**
Number of employees who have booked time on the selected project.

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## Detail View

Additional information can be opened by clicking Show Details.




The detail view displays:

- Project name
- Total duration
- Number of booking blocks
- Number of participating employees

In addition, all related booking blocks are listed:

**Employee**
Employee name.

**From**
Start time of the booking.

**Until**
End time of the booking.

**Duration**
Recorded duration of the booking block.

---

## Export Function

The Export button allows the detail report to be exported.

The export contains all currently displayed information and can be used for:

- Project controlling
- Service accounting
- Customer billing
- Project manager evaluations
- Internal documentation

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### Use Cases

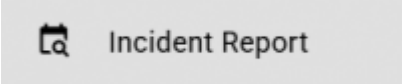
Performance reports can be used for:

- Evaluating project-related working times
- Analyzing service efforts
- Reviewing recorded activities
- Verifying performed services
- Resource and capacity planning
- Preparing internal and external billing processes

All values are calculated dynamically based on the recorded time bookings available in COBI.time and the currently selected filters.

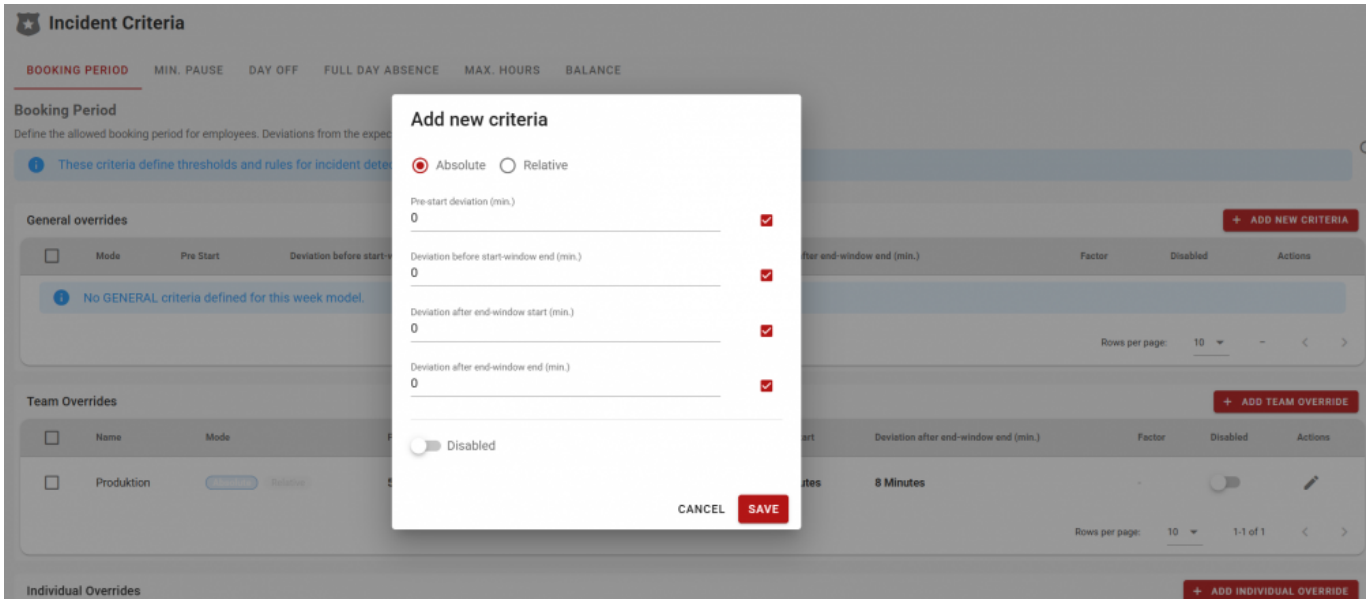
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# 5. Incident Report




The Incident Report module automatically identifies violations and irregularities related to recorded working times and attendance data.
Based on previously defined incident criteria, COBI.time analyzes employee bookings and generates a list of detected violations.

IMPORTANT:
Before using the Incident Report, the corresponding rules must first be configured in the **Incident Criteria** module.




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## Prerequisites

Incident criteria must be configured before incidents can be detected.

Configuration is performed in:

**Incidents → Incident Criteria**

Within this module, thresholds, tolerances, and rule definitions can be maintained for different incident types.

Examples:

- Booking Time Window
- Minimum Break Requirement
- Day Off
- Full-Day Absence
- Maximum Working Time
- Balance

Only configured criteria can be evaluated by the Incident Report.

---

## Filter Options

Various filters are available to control the analysis.

**Period**
Defines the reporting period.

Examples:

- Month
- Year

**Month**
Specifies the month to be analyzed.

**Employee Mode**
Defines which employees should be included.

Examples:

- All Employees
- Selected Employees

**Status**
Filters incidents according to their current status.

Examples:

- All
- Active
- Ignored

**Employee**
Restricts the report to specific employees.

---

## Violation Parameters

The available incident criteria are displayed on the left-hand side.

Using the checkboxes, users can define which criteria should be included in the analysis.

Available criteria may include:

- Booking Time Window
- Minimum Break Requirement
- Day Off
- Full-Day Absence
- Maximum Working Time
- Balance

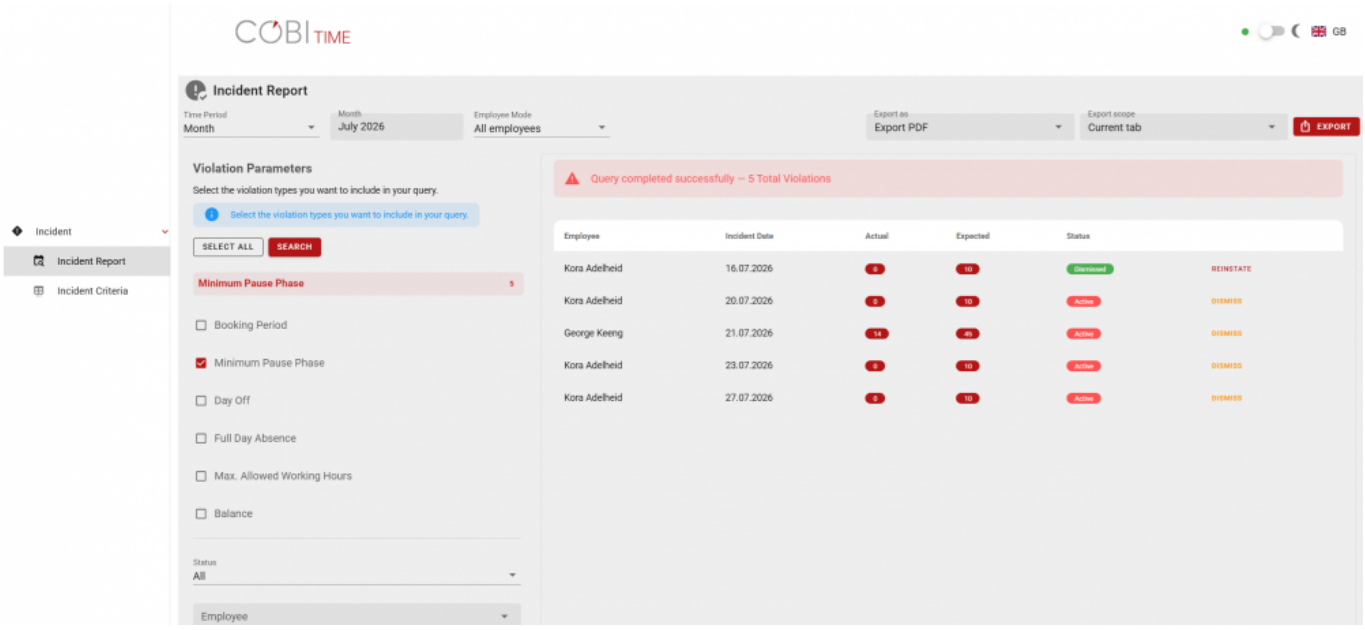
**Select All**
Enables all available criteria for the analysis.

**Search**
Starts the evaluation using the selected criteria.

---

## Result Overview

After the analysis has been completed, COBI.time displays all detected incidents.




The following information is shown:

**Employee**
Affected employee.

**Incident Date**
Date on which the violation occurred.

**Actual**
Actual recorded value.

**Expected**
Expected value according to the configured rule.

**Status**
Current processing status.

Examples:

- Active
- Ignored

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## Ignoring Incidents

Not every detected incident necessarily represents a real problem.
By selecting Ignore, an incident can be marked as reviewed.
Ignored incidents remain stored in the system but are no longer treated as active violations.

---

## Export Function

The generated incidents can be exported using the export functionality.
Available export formats include:

- PDF
- Additional formats depending on system configuration

The export includes:

- The current report
- The current tab
- The active filter settings

---

## Use Cases

The Incident Report can be used for:

- Monitoring minimum break requirements
- Identifying working time violations
- Detecting unusual booking behavior
- Reviewing balance deviations
- Preparing internal audits
- Supporting managers and HR departments

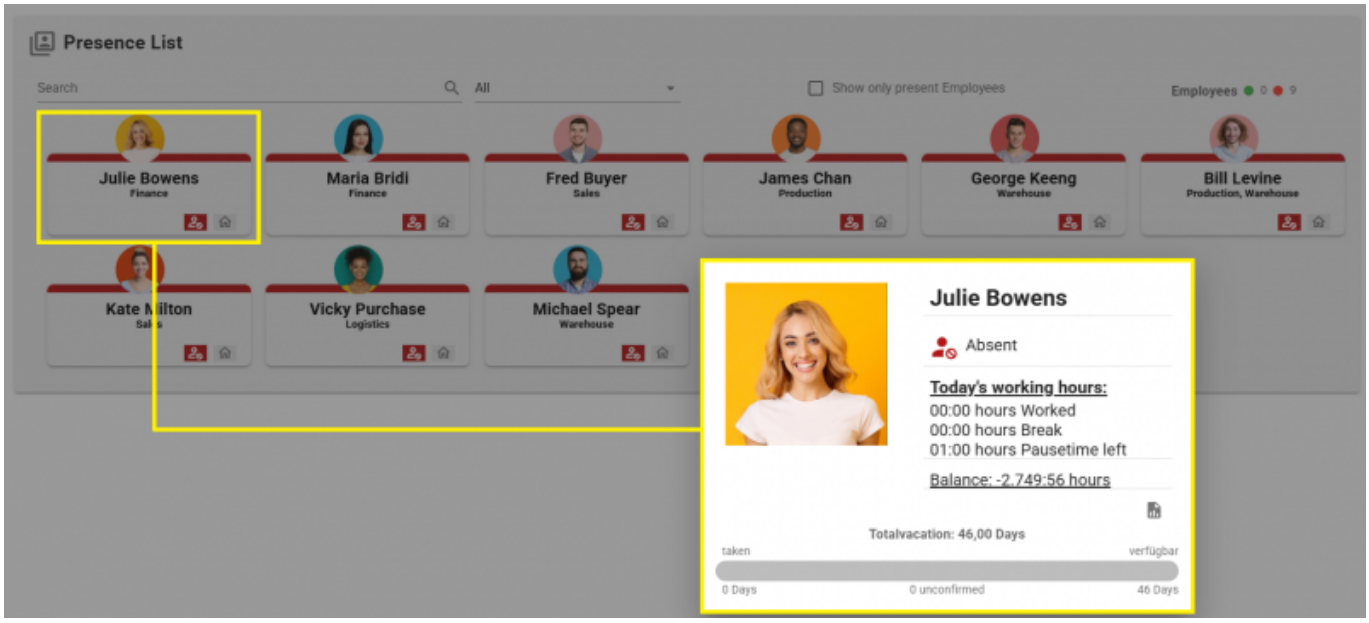
All incidents are generated automatically based on the predefined Incident Criteria.

## 6. Presence List

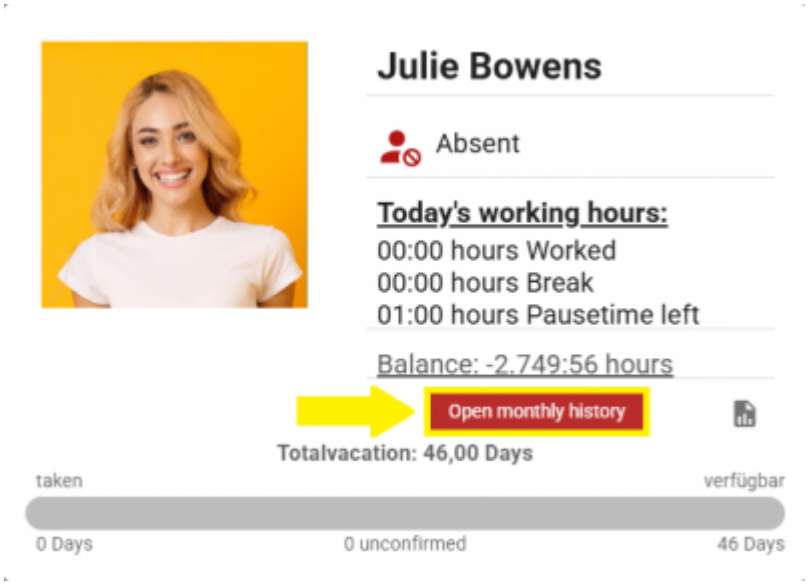



Please refer to the user manual for the standard user for the general functions.

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.



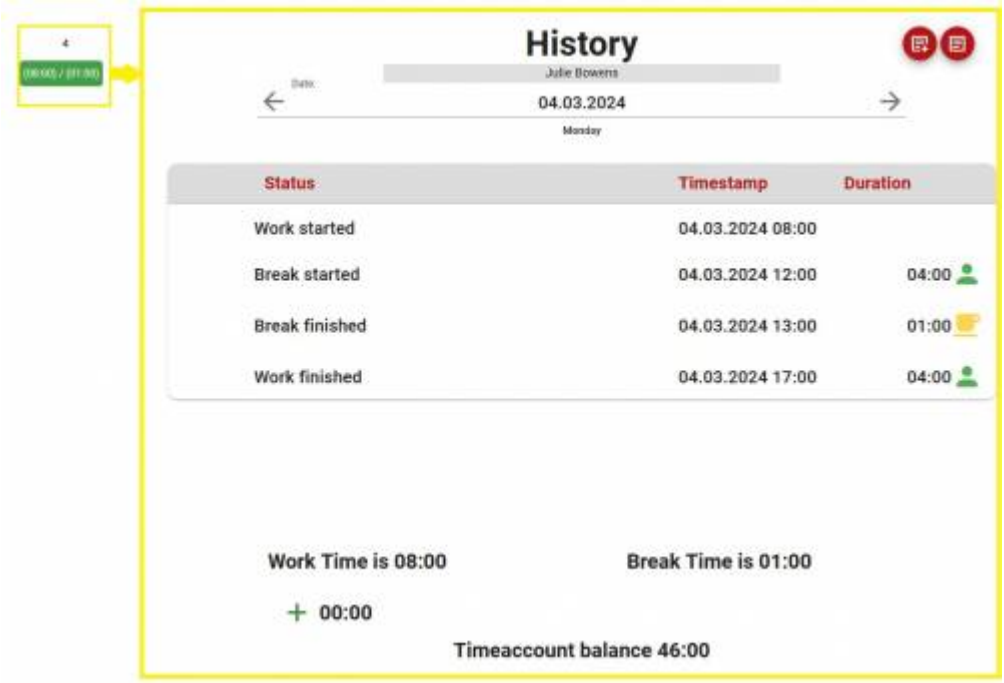

In addition, the supervisor has the option of clicking on the “Balance” to display the employee's monthly history.




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.

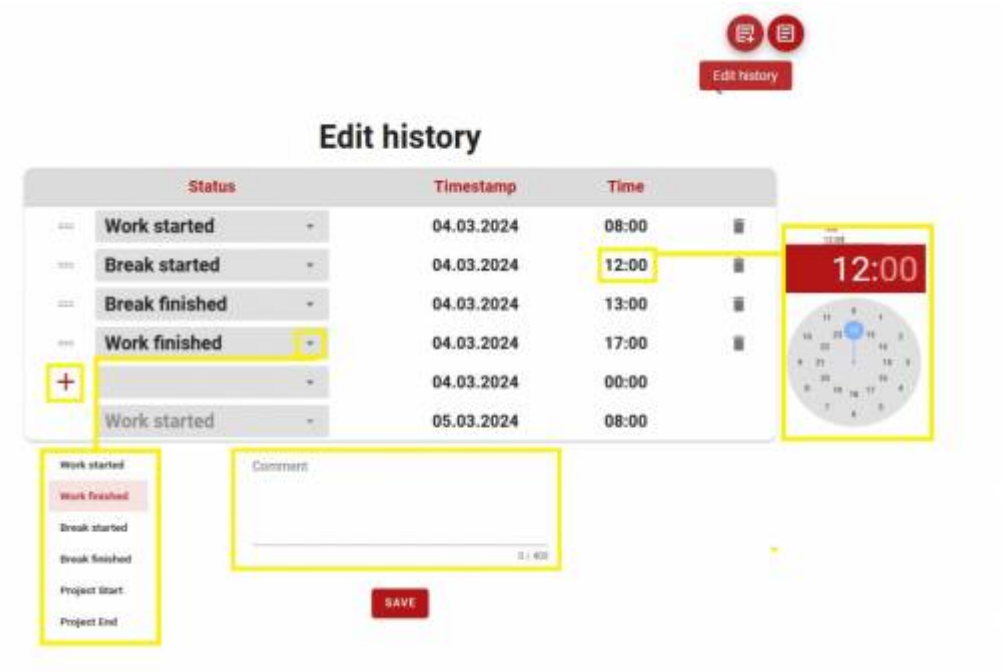



By clicking on a single day, you get an overview of the time recording per day.




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.

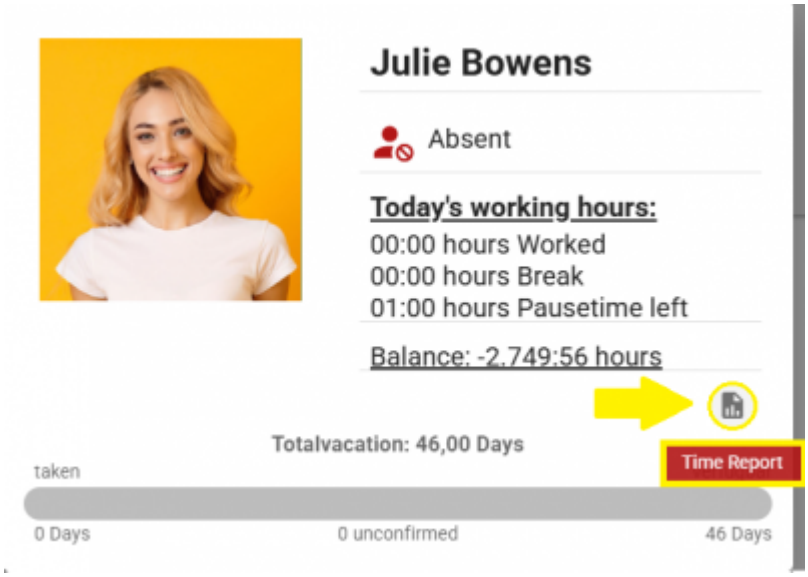
The entry does not necessarily have to be entered in the correct order of the daily schedule. The line automatically jumps to the correct position when the “Enter” key is pressed after the correction.

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:

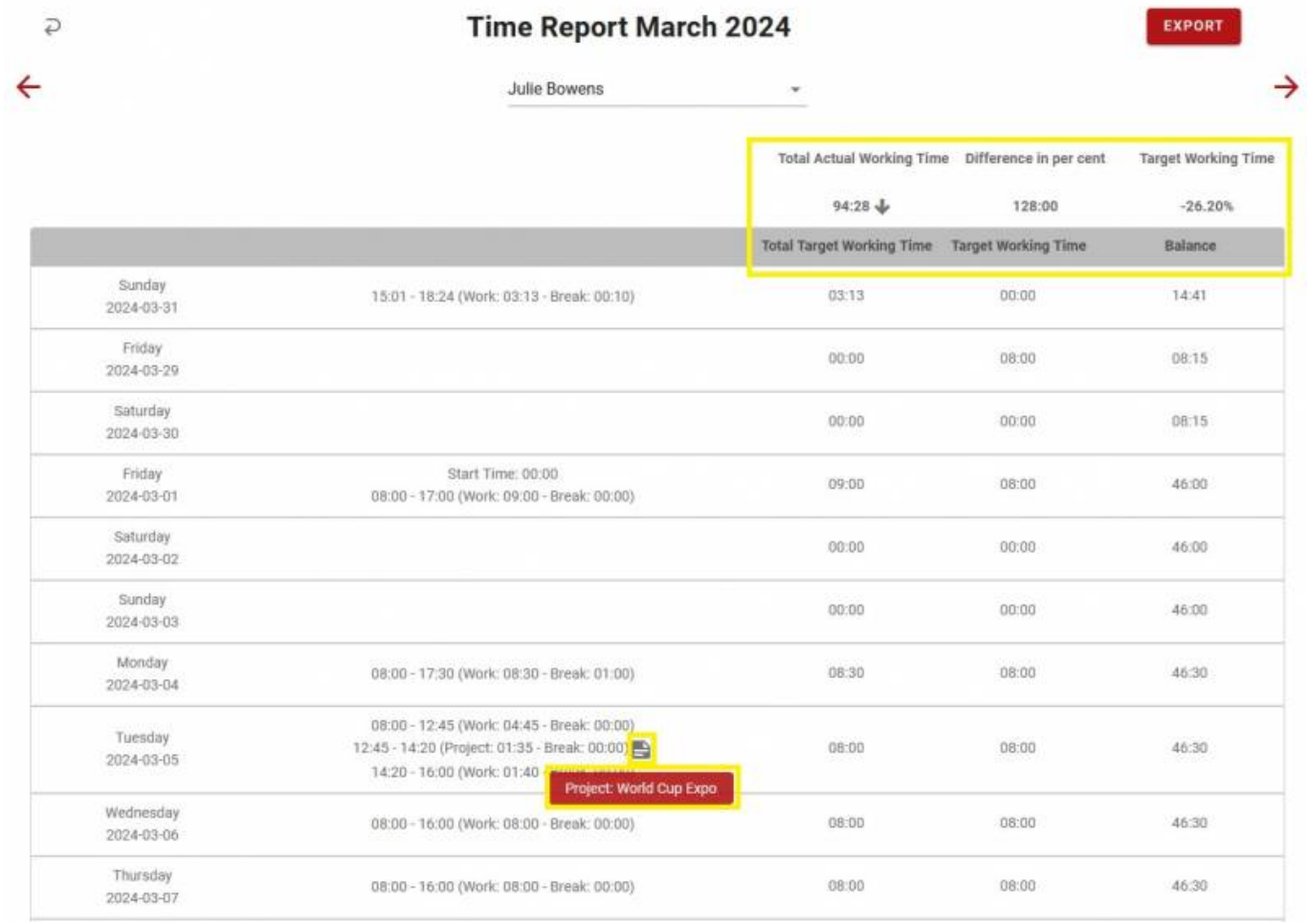


The supervisor also has the option of having a time report created from the employee. For this purpose, click on the icon ( highlighted in yellow) next to the balance in the information window.




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):



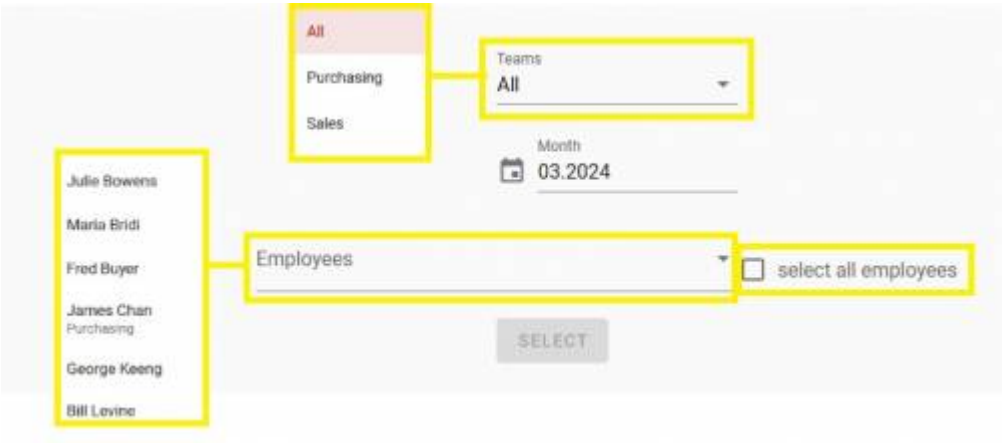
The actual and target working time, the difference in per cent and the corresponding balance are displayed. The booked times including the break are visible for the individual days. If projects have been booked, you can see these by moving the mouse pointer over the project symbol. The red arrows to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

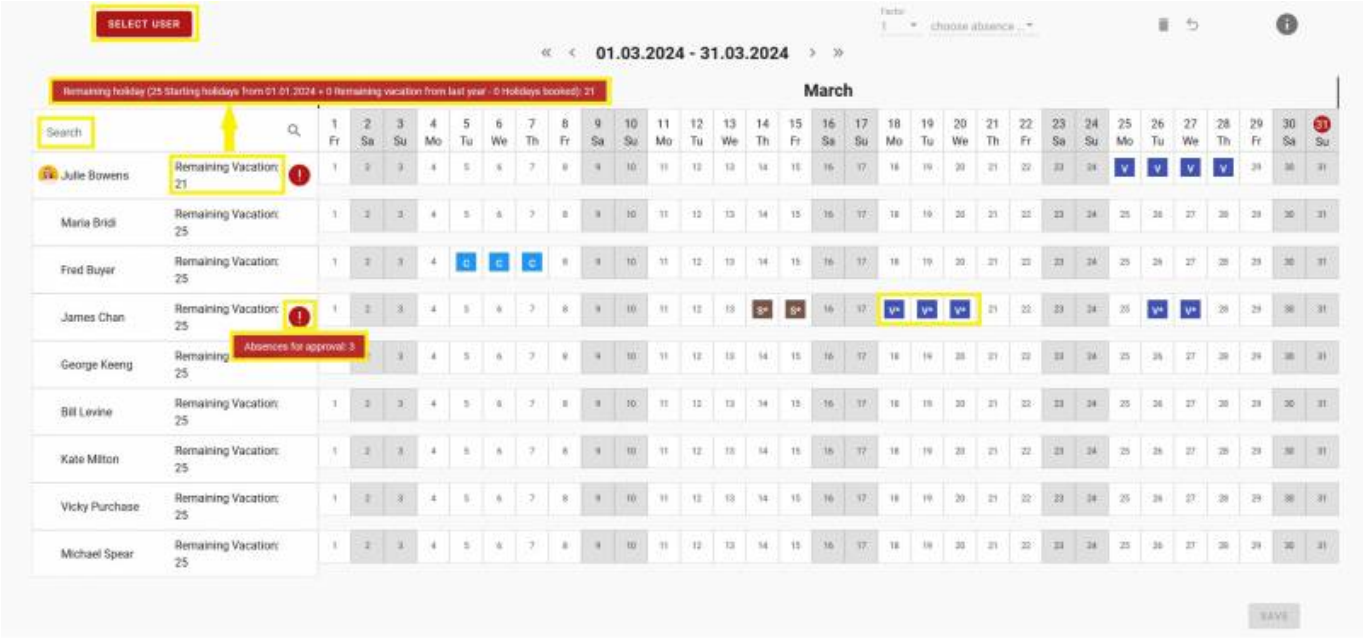
Clicking on the icon opens the following screen.



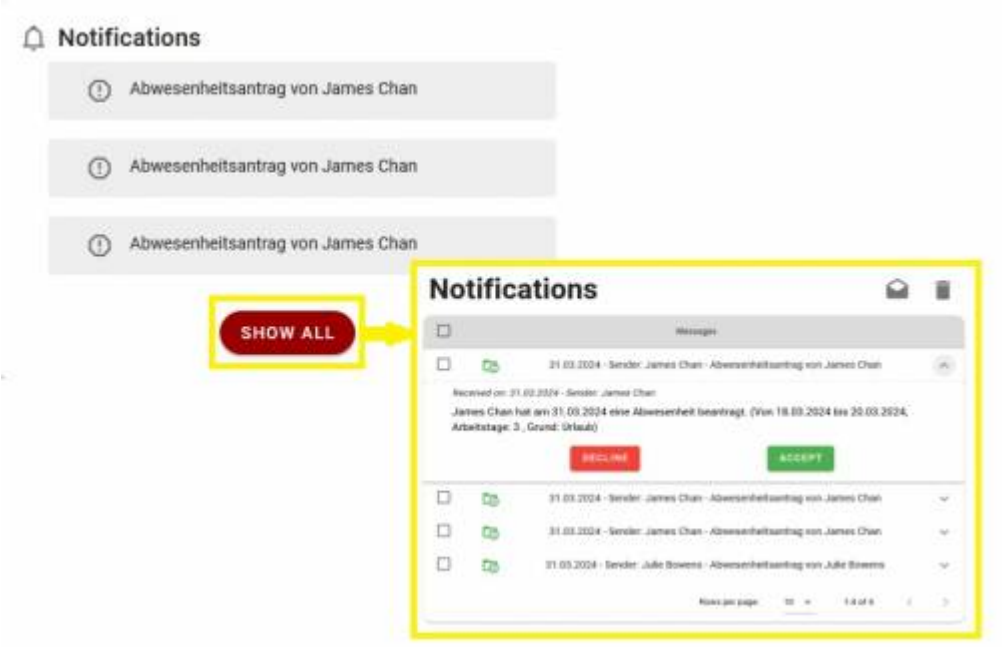

You also have the option of filtering by teams or individual employees or clicking on “All employees” to get a complete overview. If you have selected a team, the “Employees” filter only displays the employees of this team and you then have to select them either completely or individually.

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:

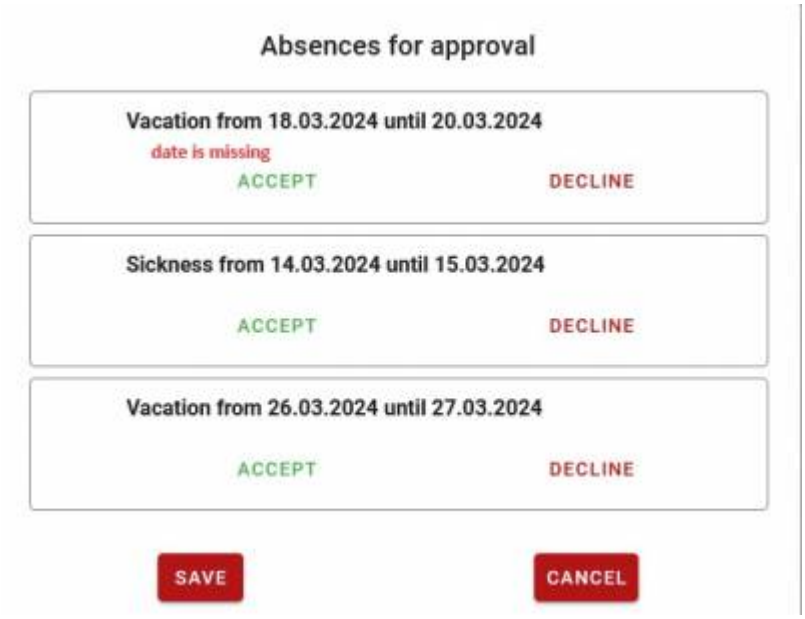



- If nothing else is selected, the current month is always displayed in the absence overview; you can scroll forwards and backwards using the arrows to the right and left of the date.
- The search function at the top left takes you back to the filter mask.
- If you move the mouse pointer over the “Remaining 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.



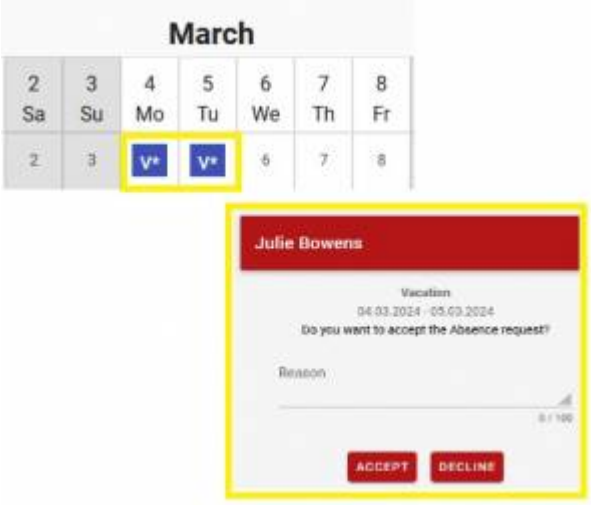

Approval/rejection of absences There are two ways to approve absence requests. Firstly, you can click on the exclamation mark icon and all of the employee's absence requests will be listed one below the

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.



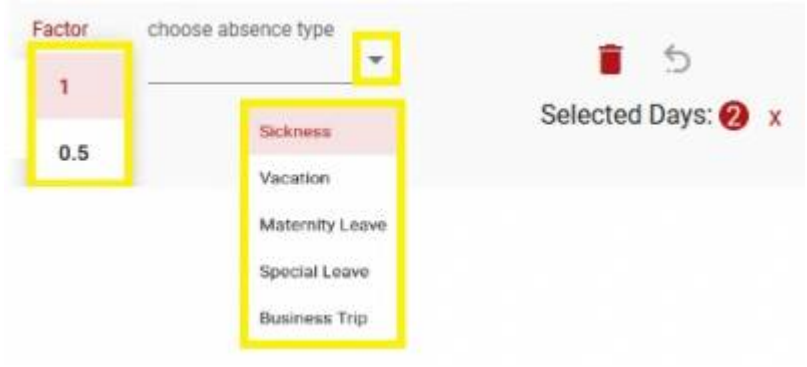

The advantage of approval via the exclamation mark symbol is that several absence requests are listed, which may not be visible in the calendar immediately if they were submitted for different months.

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.



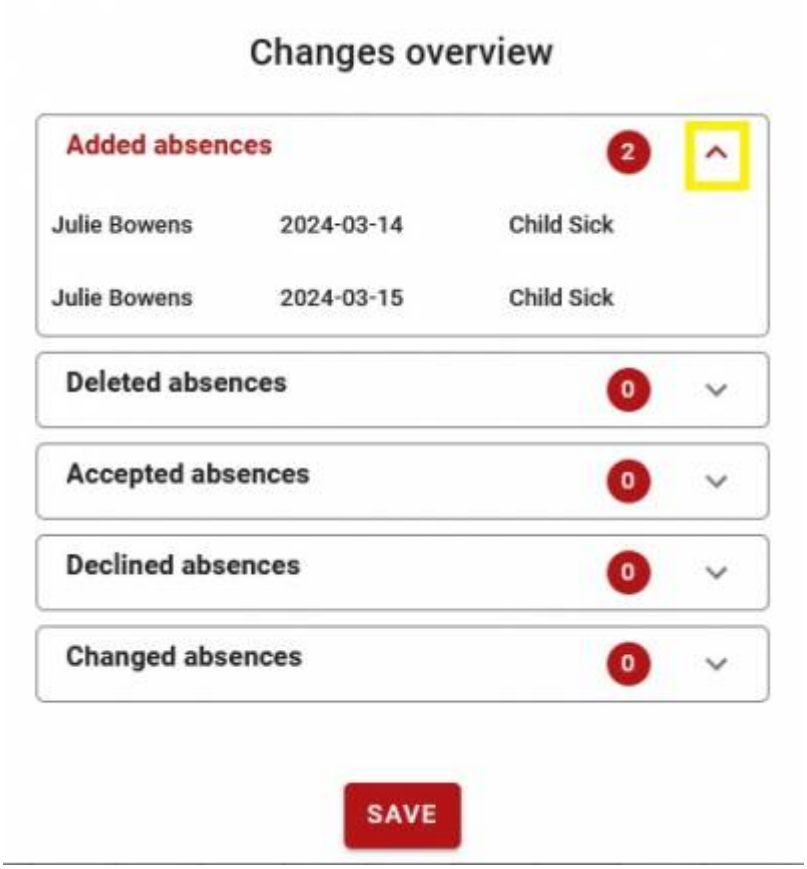

All changes (accepting and rejecting absence requests) are listed in a legend in the bottom right-hand corner and must be finally saved before leaving the module.




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..




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