CBZN Perspective - Daily Time Record (DTR) System

User Manual

Logging In

1. Access the CBZN Perspective login page through the root domain in your browser.
2. You'll see the CBZN Perspective logo at the top left of the screen
3. The login form appears in the center of the screen with "LOGIN TO YOUR ACCOUNT" as the header
4. Enter your company email in the "Email" field
5. Enter your password in the "Password" field (there is a toggle button to show/hide your password) DEFAULT PASSWORD: **UserPass123**
6. Click the green "Login" button to access your account
7. If you've forgotten your password, click "Forgot Password?" below the login button and follow the reset instructions

Navigation Sidebar

The system features a vertical navigation sidebar on the left side of the screen with the following menu items:

- My Attendance
- Attendance List
- Manage Users
- Departments & Jobs
- Schedules
- Schedule History
- Daily Time Record (with expandable menu)
  - Current DTR(not saved)
  - Saved DTR(Finalized DTR)

- Requests (with expandable menu)
  - Add Requests
  - OT Requests
  - Leave
  - Time Adjustments
  - Schedule Change
- Account Settings
- Account information and user email displayed at the bottom of the sidebar

My Attendance

The My Attendance page displays your personal attendance record:

1. **Page Header**:
   - Personal greeting with your full name
   - Employee ID displayed below your name
2. **Attendance Controls**:
   - Site selection dropdown to choose whether you are working "Onsite" or "Remote" before timing in
   - TIME-IN button for logging the start of your work day at your selected location
   - TIME-OUT button for logging the end of your work day
3. **Attendance Record Table**:
   - **Date**: The work date
   - **Day**: Day of the week
   - **Site**: Your work location (Onsite or Remote) for that day
   - **Time-in**: When you started work
   - **Time-out**: When you ended work
   - **Remarks**: Attendance status indicators (e.g., "Late", "OnTime")
   - **Status**: Work status for the day (e.g., "Work", "Rest Day")
4. **Current Date and Time**:
   - Displayed at the top right corner of the screen

The table provides a comprehensive view of your recent attendance history, allowing you to track your punctuality and work patterns across different work locations.

Attendance List

The Attendance List page displays employee attendance records:

- **Page Header:**
  - "Attendance List" displayed prominently with "List" highlighted in green
  - Date selector showing the current date
  - User Status filter dropdown on the left side
  - Search field at the top right to find employees by name
- **Attendance Record Table:**
  - ID: Employee identification number
  - Name: Full employee name
  - Date: The work date
  - Day: Day of the week
  - Site: Work location (Onsite or Remote)
  - Time-in: When the employee started work
  - Time-out: When the employee ended work
  - Status: Work status for the day(work / rest day)
  - Pagination control at the bottom of the table

Manage Users

The Manage Users page allows administrators to view and manage all system users:

- **Page Header:**
  - "Welcome Back, Admin" greeting with "Admin" highlighted in green
  - Add button for creating new user accounts
  - Employee filter dropdown
  - Search field to find users by ID, name, or email
- **User Management Table:**
  - ID: Employee identification number
  - Name: Full employee name
  - Email: Employee's email address
  - Role: User role in the system (Admin or User)
  - Status: Employment status (Employee)

  - Actions: Edit button for each user
  - Pagination controls at the bottom with page numbers

Adding New Users

The Add New User form appears as a modal window when the Add button is clicked. The form is divided into several sections for comprehensive user information collection:

- **User Account**
- **Schedule Information**
- **Personal Information**
- **Address Information**
- **Spouse Information**
- **Father's Information**
- **Mother's Information**
- **Emergency Contact**
- **Form Controls**
  - Cancel button (red)
  - Add User button (green)

Edit Users

The Edit User functionality appears as a modal window when an administrator clicks the Edit button for a user in the Manage Users section. The form is divided into several sections for comprehensive user information management:

- **User Account**
- **Schedule Information**
- **Personal Information**
- **Address Information**
- **Spouse Information**
- **Father's Information**
- **Mother's Information**
- **Emergency Contact**
- **Form Controls**

- Cancel button (red)
- Add User button (green)

Department & Jobs Management

The Department & Job Management section allows administrators to organize the company structure by creating departments and defining job positions:

Interface Layout

- The page displays a "Department & Job Management" header with "Management" highlighted in green
- The interface is split into two main sections: "Departments" on the left and "Job Titles" on the right
- Each section includes filter controls for viewing different status items

Departments Section

- Lists all company departments with their active/inactive status
- Filter options include "All Status," "Active," and "Inactive"
- Each department entry shows:
  - Department name
  - Status indicator (Active/Inactive displayed in a green badge)
  - Edit button for modifying department details
- An "**Add Department**" button appears at the top right of the page

Job Titles Section

- Lists all job positions with their department affiliations
- Filter options for:
  - Department selection (filter by "All Departments" or specific departments)
  - Status filtering (Active/Inactive)
- Each job title entry shows:
  - Job title name
  - Department affiliation
  - Status indicator (Active/Inactive displayed in a green badge)

    - Edit button for modifying job details
- An "**Add Job Title**" button appears at the top right of the page

Management Functions

Adding Departments

To add a new department:

1. Click the "Add Department" button at the top right of the Department & Job Management page
2. A modal window will appear with the following:
    - Header: "Add Department"
    - Input field labeled "Department Name" where you can enter the new department's name
    - Two buttons at the bottom:
        - "Cancel" button (gray) to abort the operation
        - "Add Department" button (green) to confirm and create the department
3. Enter the department name in the provided field
4. Click the "Add Department" button to save the new department
5. The new department will appear in the Departments list with an "Active" status

Adding Job Titles

To add a new job title:

1. Click the "Add Job Title" button at the top right of the Department & Job Management page
2. A modal window will appear with the following:
    - Header: "Add Job Title"
    - Input field labeled "Job Title" where you can enter the new position name
    - Dropdown field labeled "Department" to associate the job title with a department
    - Two buttons at the bottom:
        - "Cancel" button (gray) to abort the operation
        - "Add Job Title" button (green) to confirm and create the job title
3. Enter the job title name in the provided field
4. Select the appropriate department from the dropdown menu
5. Click the "Add Job Title" button to save the new position

6. The new job title will appear in the Job Titles list with an "Active" status and its associated department

Editing Departments

To edit an existing department:

1. Locate the department you wish to edit in the Departments list
2. Click the edit icon (pencil icon) next to the department name
3. A modal window will appear with the following:
    - Header: "Edit Department"
    - Input field labeled "Department Name" displaying the current department name
    - Checkbox labeled "Active" to set the department's status
    - Two buttons at the bottom:
        - "Cancel" button (gray) to abort the operation
        - "Save Changes" button (green) to confirm and update the department
4. Modify the department name as needed
5. Check or uncheck the "Active" checkbox to change the department's status
6. Click the "Save Changes" button to apply your modifications
7. The updated department information will be reflected in the Departments list

Editing Job Titles

To edit an existing job title:

1. Locate the job title you wish to edit in the Job Titles list
2. Click the edit icon (pencil icon) next to the job title
3. A modal window will appear with the following:
    - Header: "Edit Job Title"
    - Input field labeled "Job Title" displaying the current job title name
    - Dropdown field labeled "Department" showing the currently associated department
    - Checkbox labeled "Active" to set the job title's status
    - Two buttons at the bottom:
        - "Cancel" button (gray) to abort the operation
        - "Save Changes" button (green) to confirm and update the job title
4. Modify the job title name as needed

5. Select a different department from the dropdown if needed
6. Check or uncheck the "Active" checkbox to change the job title's status
7. Click the "Save Changes" button to apply your modifications
8. The updated job title information will be reflected in the Job Titles list

Schedules

The Schedules section allows administrators to create, view, and manage employee work schedules:

Access: Click "Schedules" from the left sidebar menu

Interface Layout:

- The page displays a "Schedule Management" header with "Management" highlighted in green
- A search bar in the top right allows you to search for specific schedules
- Status filter dropdown to view schedules by status (All Status, Active, Inactive)
- An "Add Schedule" button appears in the top right corner for creating new schedules

Schedule Cards:

- Each schedule appears as a card with its name and status indicator
- Schedule cards display the daily working hours for each weekday (Monday through Friday)
- Each day shows the time-in and time-out schedule in AM/PM format
- Cards include an edit button for modifying schedule details
- Active schedules are marked with a green "Active" label

Schedule Types:

- Regular weekly schedules with consistent time-in and time-out periods
- Custom schedules with specific working days (like TTH - Tuesday/Thursday)

- Schedules can have varying start and end times for different days of the week

Adding a New Schedule:

- Click the "Add Schedule" button in the top right corner
- A modal window will appear with the following elements:
    - Schedule Title field to enter a name for the new schedule
    - Active checkbox to immediately activate the schedule
    - Working Hours section for configuring daily schedules
    - Time selectors for each day of the week (Monday through Sunday)
    - Each day has time-in and time-out fields with clock and delete icons
    - Cancel and Save Schedule buttons at the bottom

Editing an Existing Schedule:

- Click the edit icon on a schedule card
- A modal window will open showing the current schedule configuration
- Schedule Title field displays the current name (can be modified)
- Active checkbox shows current status (can be toggled)
- Working Hours section shows the current time settings for each day
- Time fields display the current time-in and time-out values
- Make desired changes to any field
- Click "Save Schedule" to apply changes or "Cancel" to exit without saving

Working Hours Configuration:

- Set specific time-in and time-out periods for each day of the week
- Days without scheduled hours show "--:-- --" placeholders
- Weekend days (Saturday and Sunday) can be configured for special schedules
- Each time field includes clock icon for easy time selection
- Delete icon allows clearing specific time entries

Management Functions:

- View all existing schedules in a card-based layout
- Filter schedules by status (Active/Inactive)
- Search for specific schedules by name
- Add new work schedules with customized working hours
- Edit existing schedules to adjust working times or status
- Set different schedules for different days of the week

- Enable or disable schedules as needed with the Active checkbox

Schedule History

The Schedule History section provides a chronological record of schedule assignments and changes for employees:

Access: Click "Schedule History" from the left sidebar menu

Interface Layout:

- The page displays a "Schedule History" header with "Schedule" highlighted in green
- Employee selection dropdown at the top allows filtering history by specific employee
- Additional employee information displayed including Position and Department
- Tabular layout showing schedule history records

Information Display:

- Three main columns organize the history information:
    - TITLE: The name of the schedule assigned to the employee
    - EFFECTIVITY DATE: The date when the schedule assignment became effective
    - DETAILS: Option to view more information about the schedule assignment

History Record Features:

- Chronological listing of all schedule assignments for the selected employee
- Most recent schedule changes appear at the top of the list
- Each record includes a "View" button with dropdown arrow to access detailed information
- Clear visual distinction between different schedule assignments
- Date format shows month, day, and year of effectivity

Management Functions:

- Track employee schedule assignment history
- View when schedule changes were implemented
- Access detailed information about specific schedule assignments

- Monitor progression of schedule assignments over time
- View employee position and department information

The Schedule History section allows administrators and employees to maintain a complete record of work schedule assignments, providing transparency and documentation of all schedule changes throughout an employee's tenure.

Daily Time Record (DTR)

The Daily Time Record (DTR) page provides a comprehensive view of an employee's attendance and time records over a specified period:

Page Layout and Controls

- Page header shows "Daily Time Record" with "Record" highlighted in green
- Employee selection dropdown in the top left allows filtering records by specific employee
- Date range selector to specify the period for viewing DTR records (e.g., "Mar 26, 2025 - Apr 27, 2025")
- Action buttons in the top right:
    - "Edit Cutoff" button (green)
    - "Save DTR" button (green)

Employee Information Bar

- Displays key employee details:
    - Employee ID
    - Employee name
    - Department
    - Position
    - Default Schedule

DTR Record Table

The main table displays detailed daily attendance records with the following columns:

- Date: Calendar date of the workday
- Work Shift: Assigned schedule type (e.g., Regular, Regular 2, REST DAY)
- Site: Work location (Onsite or Remote)
- Time In: Recorded start time of work (in AM/PM format)
- Time Out: Recorded end time of work (in AM/PM format)
- Regular Hours: Total regular working hours for the day
- Overtime: Additional hours worked beyond regular schedule
- Late: Hours of tardiness (highlighted in orange when applicable)
- Undertime: Hours short of required work time (highlighted in orange when applicable)
- Remarks: Status indicators such as "Absent" (red background) or "Late" (orange background)

Summary Information

- Total Hours section at the bottom of the table summarizes:
  - Total regular hours worked
  - Total overtime hours
  - Total late hours
  - Total undertime hours

Key Features

- Color-coded status indicators (red for absences, orange for tardiness)
- Numerical time calculations displayed in hours and minutes
- REST DAY indicators for scheduled non-working days
- Complete monthly view of attendance patterns
- Ability to track both onsite and remote work

Usage

The DTR page allows employees and administrators to:

- Review complete attendance history for a specified period
- Track patterns of attendance, tardiness, and absences
- Monitor work locations (onsite vs. remote)

- Calculate total working hours across different metrics
- Prepare finalized DTR reports for payroll and compliance purposes

The "Save DTR" button is specifically for generating and finalizing the Daily Time Record. When clicked, it processes the current time record data and produces a final DTR report in the “Save DTR” page that can be used for official documentation, payroll processing, and compliance purposes. This finalization step is important as it preserves the attendance record for the selected period and makes it available in the saved/finalized DTR section.

Requests

The Requests section allows employees to submit and manage various attendance-related requests:

Page Layout and Controls

- Page header shows "Add Requests" with "Add" highlighted in green
- Filtering options:
  - "All Requests" dropdown to filter by request type
  - "All Status" dropdown to filter by approval status
- "Add Request" button (green) in the top right corner to create new requests

Requests Table

The main table displays all requests with the following columns:

- ID: Unique identifier for each request
- TYPE: Category of request (Overtime, Leave, Time Adjustment, Schedule Change)
- DATE: Date the request was submitted or the date it pertains to
- STATUS: Current approval status of the request
- DETAILS: Additional information about the request
- ACTIONS: Buttons for managing the request

Request Types

The system supports multiple types of requests:

1. **Overtime (OT) Request**: Request for approval to work beyond regular hours
2. **Leave Request**: Application for time off (vacation, sick leave, etc.)
3. **Time Adjustment**: Request to correct or modify recorded time entries
4. **Schedule Change**: Request to temporarily or permanently modify work schedule

Creating a New Request

To add a new request:

1. Click the "Add Request" button
2. A modal dialog appears with request type options:
   - Overtime (clock icon)
   - Leave (calendar icon)
   - Time Adjustment (clock icon)
   - Schedule Change (person icon)
3. Select the appropriate request type
4. Complete the request form (specific fields vary by request type)
5. Submit the request for approval

Request Management

From the sidebar submenu, employees can:

- Access "OT Request" for overtime-specific requests
- Use "Leave Request" for time-off applications
- Navigate to "Time Adjustments" for correcting time records
- Access "Schedule Change" for modifying work schedules

Request Processing

For request approval:

- Requests are submitted by employees through the appropriate form
- Requests appear in the system with a pending status
- Authorized personnel (managers/HR) review requests
- Approvers can accept or reject requests based on organizational policies
- Employees can track the status of their requests in the main requests table
- Approved requests are automatically reflected in the relevant system records
- Email notifications may be sent at key stages of the request lifecycle

Account Settings

The Account Settings section allows users to manage their personal account:

1. **Access**: Click "Account Settings" from the left sidebar menu
2. **Functions**:
    - Update personal information
    - Change password

Troubleshooting Common Issues

Failed Time-In/Time-Out

- **Issue**: Time-in or time-out button not responding
- **Solution**: Refresh the page and try again or login again or go back to root domain. If the issue persists, contact your system administrator

Incorrect Time Record

- **Issue**: Your time record shows incorrect information
- **Solution**: Submit a time adjustment request through the Requests section

Site Selection Issues

- **Issue**: Unable to change site selection
- **Solution**: Ensure you haven't already timed-in for the day, as site changes may be restricted after time-in

Access Restrictions

- **Issue**: Unable to access certain features
- **Solution**: Contact your administrator to verify your user permissions

System Timeout

- **Issue**: Getting logged out automatically
- **Solution**: The system has an automatic timeout for security. Simply log back in

If something error occurs:
login again or go back to root domain