



# Feature Description Document

## Understanding the Reporting Structure



## Purpose

This document explains the Reporting Structure in IXM WEB for workforce management.

## Applies to

TITAN	TFACE	TOUCH 2	SENSE 2	MERGE 2	MYCRO
All Devices	All Devices	All Devices	All Devices	All Devices	All Devices

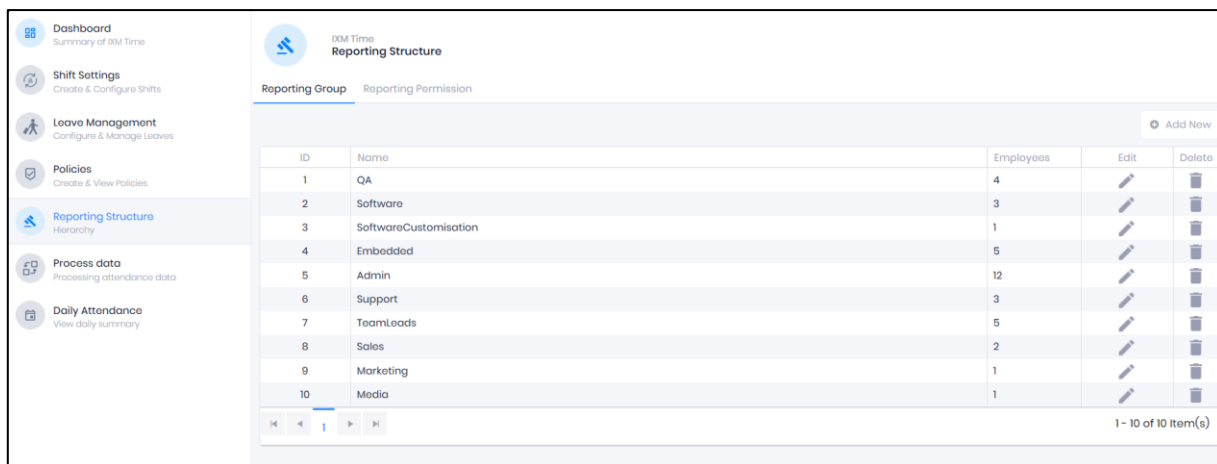
## Description

IXM WEB user can define Supervisor/Reporting Manager/Team lead to manage and monitor the employees working under time by using Reporting Structure functionality.

Reporting Manager can view employee's attendance, approve or reject attendance correction, leave and overtime for employees working under him/her.

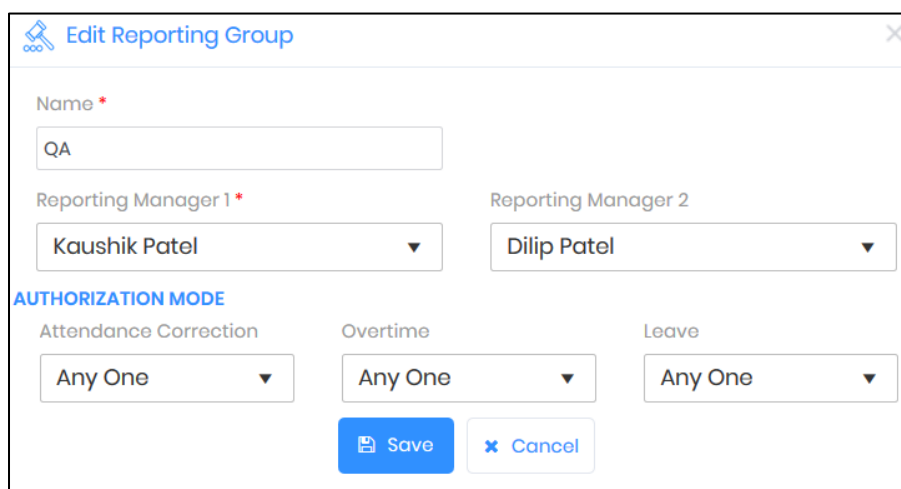
## Configuring Reporting Structure

1. From **Home** >> Click **IXM Time** tab at the top >> Click **Reporting Structure** tab to configure the settings.



ID	Name	Employees	Edit	Delete
1	QA	4		
2	Software	3		
3	SoftwareCustomisation	1		
4	Embedded	5		
5	Admin	12		
6	Support	3		
7	TeamLeads	5		
8	Sales	2		
9	Marketing	1		
10	Media	1		

2. Navigate to the **Reporting Group** tab under Reporting Structure to view existing groups and/or to create new Reporting Groups.
3. Click **Add New** on the top right corner to create a new Reporting Group.
4. You can create a Reporting Group with one or two Reporting Managers.



**Edit Reporting Group**

Name \*

Reporting Manager 1 \*

Reporting Manager 2

**AUTHORIZATION MODE**

Attendance Correction:

Overtime:

Leave:



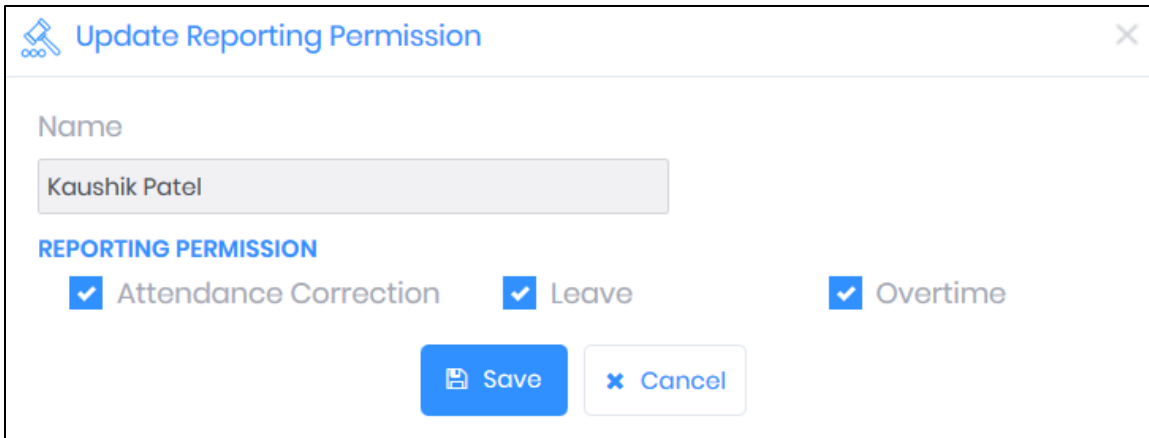
5. The various fields when creating/editing a Reporting Group are described below:

- a. Name: Assign a name for the Reporting Group being created.
- b. Reporting Manager 1: From the existing employees, select the first Reporting Manager who will be responsible for approving/denying permissions.
- c. Reporting Manager 2: From the existing employees, select the second Reporting Manager who will be responsible for approving/denying permissions.
- d. Authorization Mode: The authorization mode for this particular Reporting Group for Attendance Correction, Overtime, Leave application can be assigned as below:
  - i. **Any One:** Application request can be approved by anyone of the reporting managers. If the 1<sup>st</sup> or 2<sup>nd</sup> Reporting manager approves the application request, then the application final status is considered as approved.
  - ii. **Both:** Application request has to be approved by both Reporting Managers, only then the application final status is considered as approved.
  - iii. **1 Then 2:** Application request will be sent to the 1<sup>st</sup> Reporting Manager and once approved then the request will be sent to the 2<sup>nd</sup> Reporting Manager. After that, the application final status is considered as approved.

## Configuring Reporting Permission

Reporting Permission will define the application approval rights for each Reporting Manager assigned to the Reporting Group for attendance correction, Leave and Overtime Application.

1. From **Home** >> Click **IXM Time** tab at the top >> Click **Reporting Structure** tab to configure the settings.
2. Navigate to the **Reporting Permission** tab under Reporting Structure to view permissions for existing managers.



**Update Reporting Permission**

Name  
Kaushik Patel

**REPORTING PERMISSION**

Attendance Correction     Leave     Overtime

3. Select the Reporting Manager whose permissions you want to update.
4. Enable/Disable the respective flags for each permission for the Reporting Manager as per requirement (Attendance Correction/Leave/Overtime).



## Assigning Reporting Groups to Employees

1. From **Home** >> Click on the **Employees** tab on the top >> Select the required employee from the list >> Click **Edit**. (As an alternative this can also be done when adding a new employee)
2. Go to the IXM TIME section and assign the Reporting Group to that employee from the drop-down list.

The screenshot shows the 'Edit Employee' form with the following details:

- Employee Information:** Schedule: Schedule1, Start Shift: SI, Holiday Group: IXM India, Leave Group: IXM Leave
- Joining Date:** 06/19/2019
- Confirmation Date:** mm/dd/yyyy
- Attendance Policy:** Default Policy
- Late-IN Policy:** Default Policy
- Early-OUT Policy:** Default Policy
- Overtime Policy:** Default Policy
- Shift Based Access:**
- IXM TIME CREDENTIALS:** Username: vhargunani@invixium.com, Password: \*\*\*\*, Reporting Group: QA

Buttons: Save, Save & Continue



## Support

For more information relating to this Feature Description document, please contact us at [support@invixium.com](mailto:support@invixium.com)

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