

Out of Office Manager

The Basics

Throughout this document, and the web app, you will see the abbreviations OoO and OoOM. The first is short for Out of Office and the second is short for Out of Office Manager. The OoOM app is geared towards organizations (companies) who wish to have transparency for their members' (employees') appointments that require them to be out of the office, whether it be for business travel or personal time off (PTO). Not only does the OoOM allow users to quickly see that their co-workers are out of the office, and the reason why, it also tracks PTO and travel.

These terms will make more sense as you continue to read this document. For now it's enough to understand that you start with an Organization, add Users and then organize these users into Groups.

User Roles

There are three User Roles that can be assigned to users within an Organization and each of them has their own permitted tasks, activities and responsibilities. The viewing of certain reports is also limited to specific user roles. These three roles are as follows:

- Group Member
 - Submit requests for PTO, business travel, bereavement, etc.
 - Change user name, e-mail and contact numbers
 - Can view out of office events for everyone in their Group
- Group Leader
 - All Group Member activities, tasks and reports
 - Approves OoO requests for anyone in their group and / or their direct reports
 - Can create and post announcements for their group to view
 - Note, a Group Leader is always a Group Member but not vice versa
- Organization Administrator (Org Admin)
 - All Group Leader activities, tasks and reports
 - Maintains Users (create new user accounts, edit or remove existing users, assigns users to Groups and Calendars, assigns OoO allocations)
 - Maintains Groups (add, edit and delete)
 - Maintains Calendars (add, edit and delete) and Holidays
 - Note, an Org Admin will also be either a Group Member or Group Leader. The designation of being an Org Admin simply means you have the authority to perform certain administrative tasks not necessarily directly related to tracking OoO appointments

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Note, in the context of this document, a “User” is someone with an account on the OoOM app who has been associated with at least one organization. Also note, a User may belong to multiple organizations and they may have a different user role in each of these organizations. If they belong to multiple organizations, upon logging into the app, they will be prompted to select which organization they would like to view. At any time they may switch between these organizations

Groups

A Group is synonymous with a department. By default, all users within a Group can see the appointment calendars for their fellow Group Members. Note, they can only see generic details not specific details, i.e. they can see that a group member is on PTO but not the specifics of where or what they will be doing while on PTO.

Groups may opt to share their appointment calendars with other Groups. For example, if Groups A and B work closely together, they may choose to share their appointment calendars whereby a member of Group A may see the appointments of everyone in Group B and vice versa. Sharing Calendars can only be set up by an Org Admin.

Allocations

In addition to holidays and accepted observances, many organizations (companies) provide allocations for PTO to their employees. If these values are set in the OoOM, the app will track how much time was taken and how much remains for every user. A supervisor will be able to see a summary of their allocations, a summary of just their direct reports or a summary of all users within their reporting tree. Non-supervisors will only be able to see their allocations.

Allocations are maintained by an Org Admin as part of the Maintain Users session. Note, near the end of a year, an Org Admin may run a utility which will copy one year’s allocations to another year for all active members of their organization.

Calendars and Holidays

As we all know, different countries have different holidays and accepted observances. To take this into account, Org Admins have the option of creating Calendars and assigning them to users. For each of these calendars, they can then create the holidays and observances for a particular year. By assigning a Calendar to a user, that user will see their holidays and accepted observances on their appointment calendars and the app will not allow them to request PTO on these days. In addition, other users, with different Calendars, will also be able to see that a particular day is a holiday or observance for someone else.

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Requests

In the OoOM app Users submit requests for events that will require them to be out of the office such as PTO, business travel, civic obligations (jury duty), etc. These requests are reviewed and approved by their supervisor. OoO events are displayed on Group event calendars allowing everyone in that Group to see which of their colleagues is out of the office and for what reason. As Users submit OoO requests, the app will track their allocated OoO time versus how much time they have requested. The app will not prevent a User from submitting requests once they have consumed their allocations, however it will flag the overages for their supervisor.

Here are some additional things to consider about Requests:

- Your allocated OoO time will be debited as soon as you submit a request, not upon approval by your supervisor
- You can modify any request, including deletion, prior to the date of the event. After that date, you'll need to contact your supervisor or an Org Admin to modify it for you
- Once an OoO appointment is deleted, your OoO allocated time will be credited
- Groups can be set to Auto-Approve which means all Requests submitted by members of that group will be automatically approved and no notifications sent
- Your immediate supervisor, or anyone you select as a designate (in the Update Profile session) will be able to add, edit or delete OoO requests on your behalf

Personal Message Center

The OoOM app contains a Personal Message Center (PMC), like a chat application, where Users can send messages to each other. The OoOM app will also send notifications via the Message Center. Messages are only viewable by the sender and the receiver and either one of those individuals may delete the message at any time. The PMC is not intended to be a long-term storage location for messages, such as an email app. Therefore, to preserve space on the server, all read messages will be automatically deleted after 30 days and all unread messages will be deleted after 60 days. There are no warnings or notifications sent out before messages are deleted so if you need to preserve a message, it is highly recommended that you take a screenshot of the message and store it on your personal device.

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Reports

Let's face it there's not a lot of reporting required for an app that keeps track of whether or not people are in the office. Most of the reports, are graphical in nature, i.e. a calendar with names listed on particular days when they will be OoO. It is important to note, that only supervisors will be able to see their reports' OoO allocations, detailed explanations for OoO events and a full year view of OoO events. Users can see the full details about their OoO events, they cannot see anyone else's OoO allocations and at most can only see a three-month window of OoO events for their colleagues.

Creating an Account

When signing up for a new account, an Organization, a Group and a new User account will be created for the person requesting the new account. This person, by default, will be assigned to a Group named Admin and will be designated as an Organization Administrator (see User Roles) which will allow them to configure their new Organization, to include adding Users, organizing them into Groups, creating and assigning Calendars and Holidays and assigning OoO allocations. Signing up for a new account is a relatively simple process, especially if you already have an OoOM account and are using the site for another organization.

From the New Account Sign Up page, complete the form on the left if you do not currently have a user account on the site or the form on the right if you already have a user account on the site. Note, usernames and organization names must be unique but the same username can be used in multiple organizations. Once submitted, your request will be reviewed by a Site Administrator who will complete the necessary steps to create an account for you. The requestor will be sent an e-mail either requesting additional information or informing them that their new account has been created.