

# WorkLink

## Administration Guide

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# 1. Terminology Definition

- **Backend administration system:**

Referred as backend administration, all system settings can be managed in backend.  
(web address: admin.worklink.services)

- **Backend administrator**

Referred as administrator, manager of system users and all system settings.

- **General user**

Referred as user, user of all services of the system.

## 2. Start Usage

### 1. Company subscription Administrator

1. Administrator clicks "Subscribe Now" from website (web address: info.worklink.services), filling application form to apply administrator account.
2. Administrator receives email of verification letter and complete verification process.

### 2. Team build up Administrator

1. Administrator logs into backend with administrator account and start settings.
2. Administrator adds users (such as employees, team members) to "Contacts" one.
3. System sends emails of verification letters to each user of the Contacts by one.

### 3. User activation User

1. User receives email of verification letter and click "Activate account".
2. User sets up new password to complete account settings.

### 4. Mobile application login User

1. User downloads WorkLink App from Apple App Store/Google Play Store.
  2. User logs into system with user account and password.
- Administrator account differs from user account of WorkLink App, please access "Contacts" of backend administration to add new user and then login with newly added user account and password.

## 3. Premium Feature BPM

### 1. Setup form

Form subject	Form type	Form version number
<b>A</b> <input type="text" value="Travel Expenses Reimbursement"/>	<b>B</b> <input type="text" value="Uncategorized"/> ▾	<b>C</b> <input type="text" value="v.1"/>

A. Enter title of the form:

The name of title will show as document title.

B. Form category selection:

The category affects sequence of each form group, select "uncategory" when build up the form the first time or build up form category from "Set form category" in upper right corner of "Mobile approval" page.

C. Form version number:

The category affects sequence of each form group, select "uncategory" when build up the form the first time or build up form category from "Set form category" in upper right corner of "Mobile approval" page.

### 2. Set form number

<b>A</b> Default code <small>(Use "English", "digits", "." characters, up to 20 characters)</small>	Serial number format	Form number preview
<input type="text" value="MA"/>	<input type="text" value="YYYYMMDD00001"/> ▾	MA2017031500001

A. Form number is composed of "Starting number" and "Sequence number", administrator can customize "Starting number" for the form and then set "Sequence number" format for each form number, application forms will be given a number automatically based on sequence number.

### 3. Fill the form content

- Form description:
  - a. Form title: Form title settings
  - b. Field name: Field name settings
  - c. Field type: Field format selection
  - d. Default content: Default contents will display in unfilled fields to advise user how to fill them
  - e. Newly added field: Each form can display multiple fields, maximum five fields are recommended for easy reading on mobile phone

- Multiple fields can be added to forms, and their formats are not limited.
- Mobile phone screen shows a single form, multiple forms can be displayed by switching the screens.

Form subject

Field Name	Field type	Content
	Select form type <span style="font-size: 0.8em;">▼</span>	Enter reminding text
* This field will be displayed in the form list by default		
<div style="border: 1px solid #00a0e3; padding: 5px 15px; display: inline-block; color: #00a0e3;">Add field</div>		

Delete form

## 4. Approval flow

1. Flow settings: build up a new flow or select existing one.
  2. Click "Complete form" to complete building up the form.
- First person in approval flow is the applicant, administrator arranges approval sequence later on.
  - "Applicant data" is imported by system, no need to fill.

## 5. Edit and delete form

All built up forms are categorized and displayed in "Mobile approval" page, they can be edited or deleted anytime.

# 3. Premium Feature    Clock In

## 1. View clock in record

Select desired content per "Department" and "Date".

## 2. Export clock in record

Click export icon to export Excel file of clock in record, the record of individual user is also exportable.

## 3. Clock in settings

Default settings of mobile clock in are "GPS" and "Supervisor approval mechanism" enabled, they can be disabled in "Settings".

## 4. FAQ Backend

- **Why backend administration is required? Who is suitable to be administrator?**

Backend administration is the center of WorkLink settings, such as import contacts, publish announcements, build up approval forms, export clock in data, edit company information. Administration department of the company is recommended to be administrator.

- **What is the cap of user number?**

WorkLink authorization is single company base, so user numbers are unlimited in a single company.

- **How to delete user account?**

Click "delete" or "resignation saves" from Contacts of backend administration, user record of resignation saves displays in history data. Account user can not login once account is closed.

- **How to change account password of backend administration?**

Access "Settings" and click "Change password", enter original password and new password.

- **What if password of administrator is lost?**

Visit login page of backend and click "Forget password", enter account (email), system will send preset password automatically to the email address.

- **What if password of user is lost?**

Click "Forget password" in login page, enter account (email), system will send preset password automatically to the email address.

- **Why does user not receive "verification letter of account activation"?**

Make sure function of server blocks email for company domain mailbox is disable, or search email in trash mailbox. Please contact customer service if verification letter is not received with both attempts.

## 4. FAQ    Contacts

- **How does user use WorkLink?**

Add new user from contacts settings of backend administration, system will send email of "account verification letter" automatically, user can activate account via the email.

- **Is Contacts importable in the form of table?**

Yes, download importable sample form, fill it and then upload it.

- **User is supreme supervisor when importing Contacts, what to do if there are no ID and name of direct supervisor to fill?**

Fill in "none" in the field.


- **Is format of employee ID restricted?**

There is no restriction for employee ID format, Chinese letters, English letters and numerics are usable.

- **What if there is no employee ID?**

To avoid any influence to function of mobile approval, this field is required, enter with serial number is recommended.

- **There is only field for direct supervisor for Contacts import, is it possible to set department supervisor separately?**

Yes, click  in the upper right corner of the screen, enter "Contacts settings" to set job rank, office location and department supervisor.


- **Can Contacts form be used repeatedly?**

Yes, however, information of imported users can not be duplicated, if batch import is selected and first imported batch is 10 users, the 10 users in first batch have to be deleted before second import, and then simply import the user information of second batch.

- **How to inform the user to activate after importing Contacts?**

After completion of Contacts import, click "Announce" in upper left corner of the screen, system will send "verification letter of account activation" automatically to users mailbox, personal password can be set after login.

- **Is Contacts exportable?**

Yes, click  in upper right corner of the screen, press button to export Contacts in Excel format.

## 4. FAQ Cloud Drive

- **Is storage capacity of cloud archive limited?**

WorkLink provides each company 1GB free storage without time limit, various Premium Storage solutions are provided that can be purchased from backend administration.

- **What is size limit for each cloud file?**

A single file size limits to 500MB.

- **How to manage cloud hard drive of user?**

Administrator can access "Cloud hard drive" of backend administration to check usage of each department or user.

- **What to do if user exceeds usage limit?**

Administrator can access "Cloud hard drive" of backend administration to send reminders to users.

- **Are categories in cloud hard drive customizable?**

Files are sorted automatically to "Chats", "Announcements" and "Notifications"...etc in cloud hard drive.

- **Does user know his/her usage capacity of the Cloud Drive?**

User can access page of "Cloud Drive" where file numbers and storage are displayed.

- **How to share files with the other users?**

Upload the file and click "edit"-"share" to select sharing targets.

- **How to delete cloud file?**

The files inside "My files" can be deleted directly by clicking "edit"-"delete"; for the other files, access function to delete original files.

## 4. FAQ BPM

- **Where is mobile approval stored when it is completed?**

Completed application flow displays in "Document managing center" of mobile approval form management in backend, administrator can print out and save the forms.

- **Is mobile approval exportable?**

Yes, the applicant can export approval document singly in pdf file.

## Company Profile

- **What is recommended resolution for the pictures used in company profile?**

The picture ratio of key vision of company profile is 16:9, recommended larger than 720 x 405 pixels; The picture ratio of company location is 16:9, recommended larger than 240 x 135 pixels.

## Announcements

- **What is restriction of character numbers for an announcement?**

Maximum 50 characters for announcement title and 5000 characters for the content.

- **What are file types supported as attachment in announcement?**

Pdf, doc, xls, png, jpg files are supported as attachment in announcement.

- **Can announcement be sent to assigned department?**

The publication target of announcement is whole company, please use "Notify" function to send notification if the target user is to be assigned.



## Contact Us

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