

Missing Time Reminder (Beta)

Process Automation

Elite Plan



About this automation:

Use this process to remind staff with missing time entries and notify their managers once reminders are sent.



Simply import the sample automation, customise to suit your practice, test and activate!

The screenshot shows the configuration page for an automation. It includes fields for Name, Description, Trigger (Schedule), Filter (Employee - View Filters), Owner (Anna Jordan), Start From (05/06/2025), Last Run (Not yet run), and Next Run (Thursday, 12 June 2025 03:00). There are buttons for 'Test' and 'Back'. At the bottom, there is a table with 2 steps, each with an application of 'FYI Actions' and an action of 'Summary Notification'.

Step	Application	Action
#1	FYI Actions	Summary Notification
#2	FYI Actions	Summary Notification

What's included:

- ✓ Automation Process Steps

The screenshot shows the automation summary and notification interface. It includes a header for 'FYI: My Team - Missing Time Reminder' with a gear icon. Below, there are two 'FYI Automation Summary' cards. The first card has a message: 'Employees for your attention by the FYI: My Team - Missing Time Reminder automation. Please submit your missing time entries for last week. Your manager has been advised.' The second card has a message: 'Employees for your attention by the FYI: My Team - Missing Time Reminder automation. Sarah Brown has missing time for last week. They have been sent a reminder notification.' Both cards have a 'Mark as read' button. At the bottom, there is a table with columns: Name, Partner, Manager, User Role, Target Productivity, Actual Hours, Expected Hours, Missing Hours, Draft Hours, Actual Productivity, and Productivity %.

Name	Partner	Manager	User Role	Target Productivity	Actual Hours	Expected Hours	Missing Hours	Draft Hours	Actual Productivity	Productivity %
Anna Jordan	Chris Williams	Anna Jordan	Admin	80.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%
Colin Williams	Chris Williams	Anna Jordan	Admin	80.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%
Lee Hunt	Roger Taylor	Roger Taylor	Admin	50.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%
Henry Jones	Roger Taylor	Lee Hunt	Admin	80.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%
Chris Williams	Anna Jordan	Henry Jones	Admin	80.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%
Sarah Brown	Chris Williams	Anna Jordan	Admin	80.00%	00:00	00:00	00:00	00:00	0.00%	-10.00%

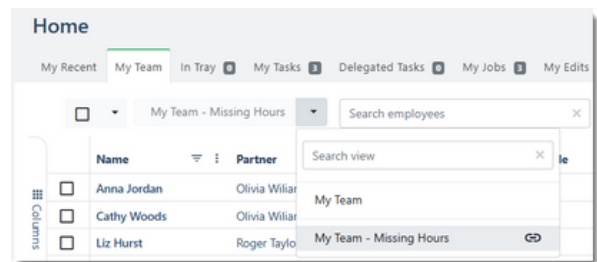
The screenshot shows the configuration page for an automation. It includes fields for Name, Description, Trigger (Schedule), Filter (Employee - View Filters), Owner (Anna Jordan), Start From (05/06/2025), Last Run (Not yet run), and Next Run (Thursday, 12 June 2025 03:00). There are buttons for 'Test' and 'Back'. At the bottom, there is a table with 2 steps, each with an application of 'FYI Actions' and an action of 'Summary Notification'.

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#1	FYI Actions	Summary Notification
#2	FYI Actions	Summary Notification

How to import:

Before you begin, ensure your View has been saved in the My Team list with the following filters (or those relevant for your requirements):

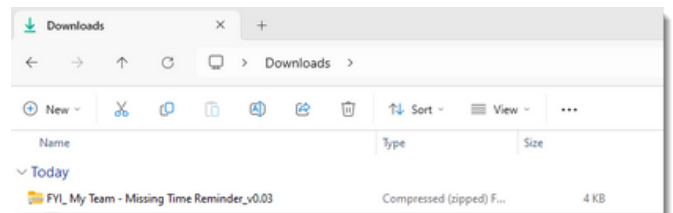
- "My Team - Missing Hours" View
- Missing Hours = Less than 0



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

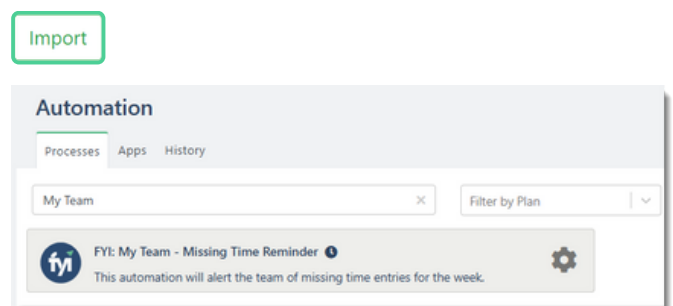


Step 2 - Import the files into FYI

Navigate to Automation - Processes and click the Import button on the right-hand side of the screen.

Locate and select your saved "FYI_My Team - Missing Time Reminder" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



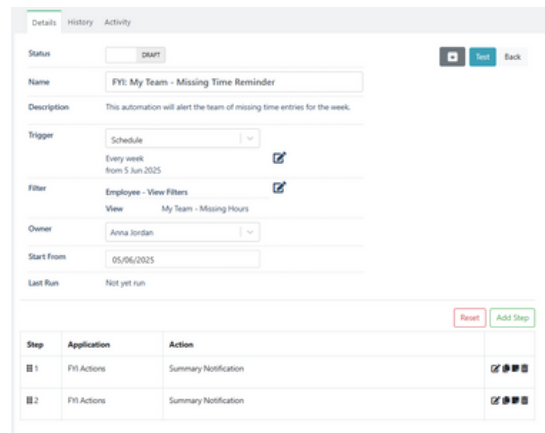
Step 3 - Review the process

The Process is imported with the Status set to Draft.

You can locate the process by searching in the "Search processes" field.

This process uses the "My Team - Missing Hours" View, which is the custom view you created in the My Team List.

- Review the schedule
- Review the process owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



Step 4 - Test and run the automation

Click the Test button to display a list of all employees that fit the missing hours criteria.

Search and select a specific employee to run the test for and select Run Test.

Confirm the notifications were received for the employee and their respective manager.

When ready, set the Status to Active.

- This automation is set to run automatically each week.

