

Missing Time Reminder 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!

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

What's included:

- ✓ Automation Process Steps

FYI: My Team - Missing Time Reminder

This automation will alert the team of missing time entries for the week.

FYI Automation Summary

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.

FYI Automation Summary

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.

Name	Partner	Manager	User Role	Target Prod...	Actual Hours	Expected H...	Missing H...	Draft Hours	Actual Prod...	Productivity ...
Allen Fisher	Sally Garton	Phil Cox	Admin	75.00%	00:00	36:00	36:00 (1)	00:00	0.00%	-75.00%
Amanda Bailey	Henry Spens	Crystal Rich	Admin	75.00%	00:00	37:00	37:00 (1)	00:00	0.00%	-75.00%
Anna Jordan	Sam Phillips	Rose Pridmore	Admin	75.00%	00:00	37:00	37:00 (1)	00:00	0.00%	-75.00%

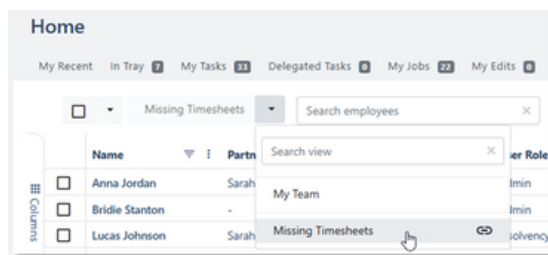
Step	Application	Action
1	FYI Actions	Summary Notification
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How to import:

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

"Missing Timesheets" View

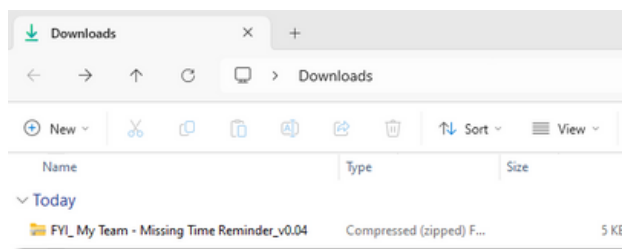
- Missing Hours = Less than 0
- Filter = Relative, Last Week



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.

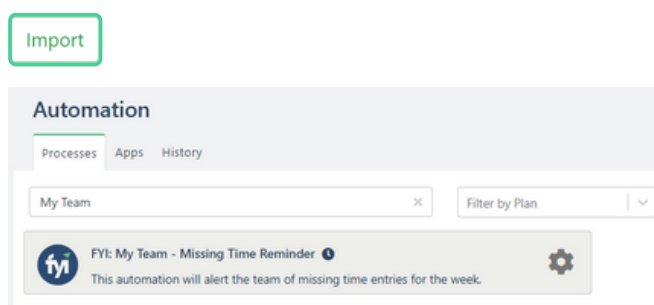


Step 2 - Import the files into FYI

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.



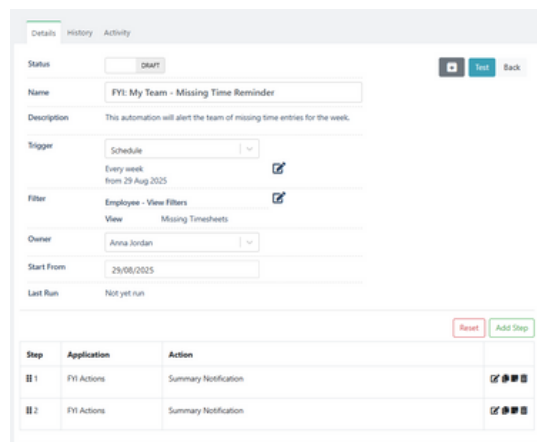
Step 3 - Review the process

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 Monday each week.

