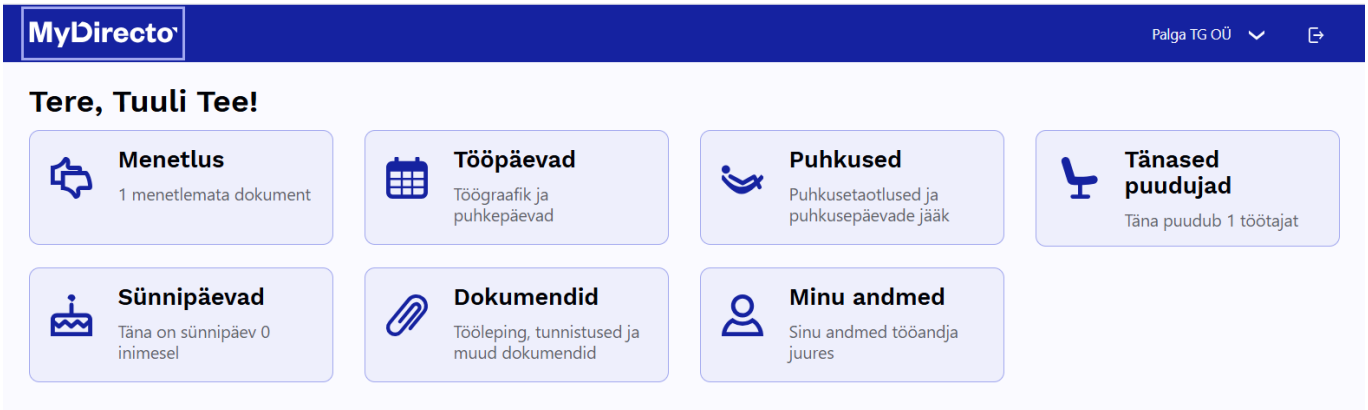
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MyDirecto

Screenshots are in Estonian – update in progress

MyDirecto is an environment aimed at company employees for conveniently managing their own data. You can log in to the portal using ID login (ID card, Mobile-ID, Smart-ID) at https://my.directo.ee. MyDirecto is convenient to use both on a mobile device and on a computer.



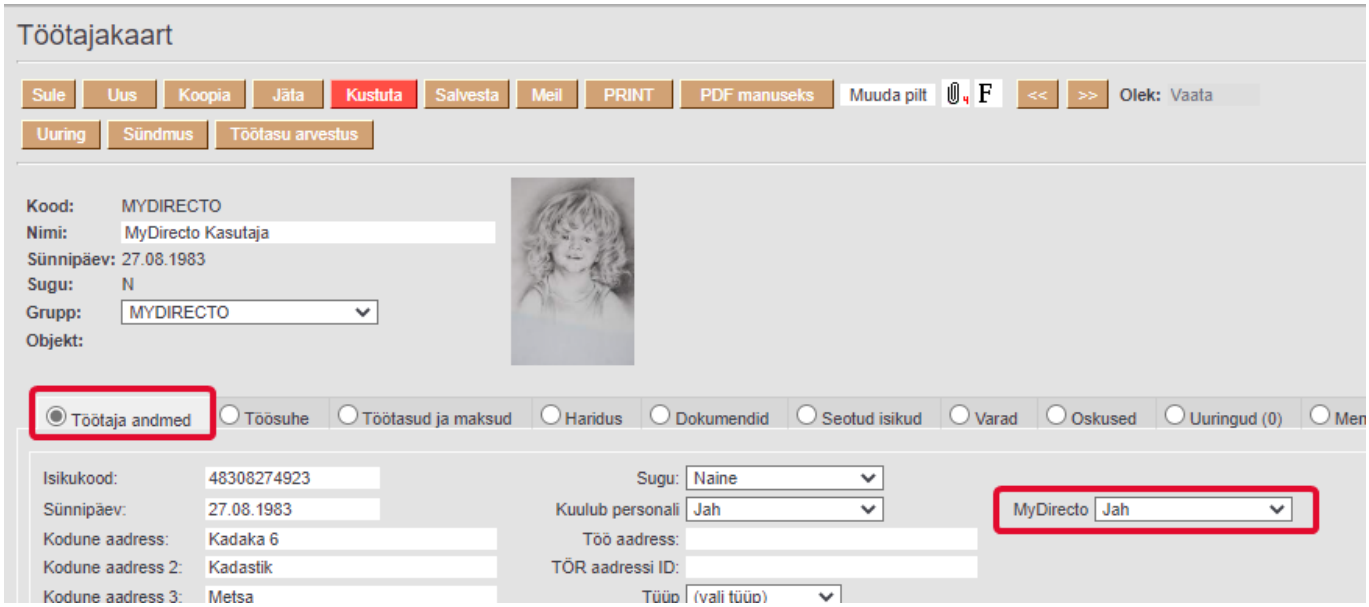
To activate MyDirecto, please contact Directo customer support.

For the pricing of the service, see the Directo website: https://directo.ee/hinnad#MyDirecto.

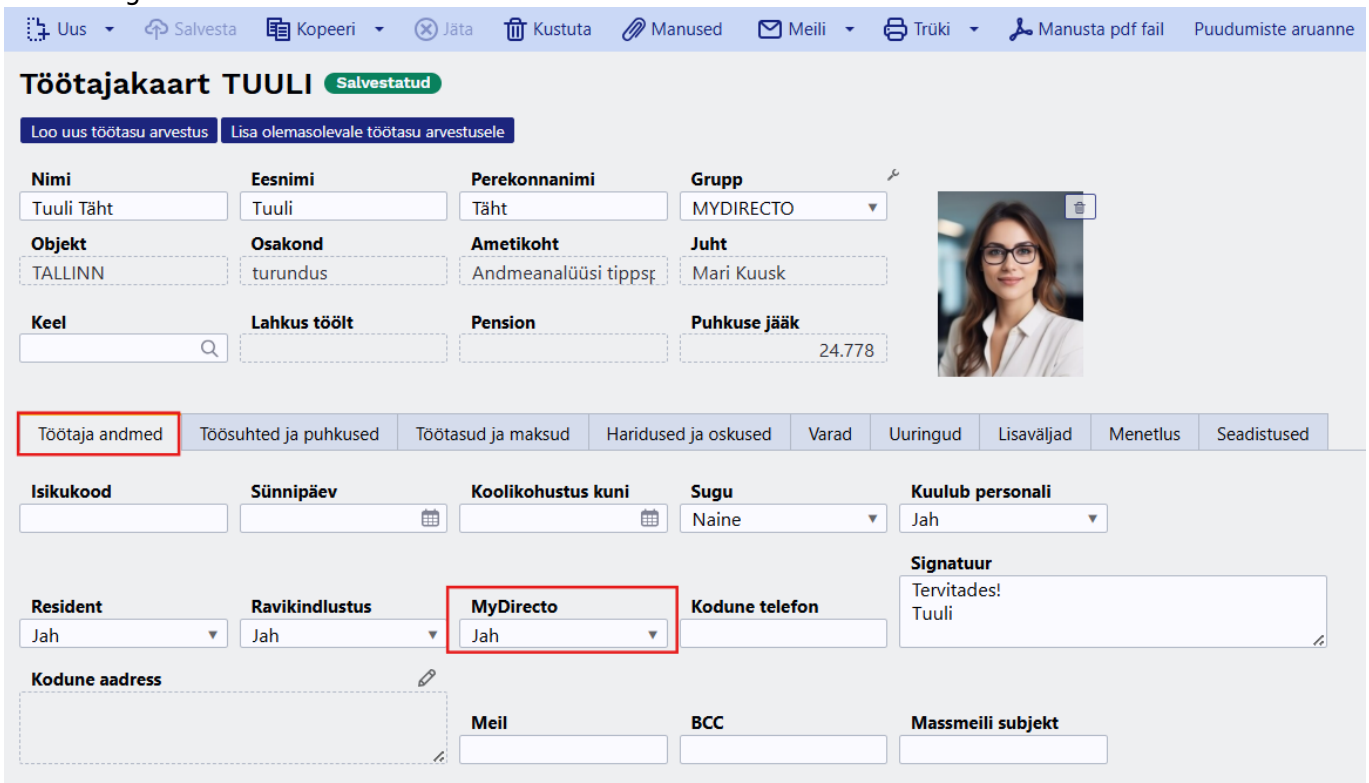
Configuration

MyDirecto permission for an employee

On the employee card, in the `Employee details` tab, after activating MyDirecto you can specify whether a particular employee has the right to log in to MyDirecto or not.



New design:



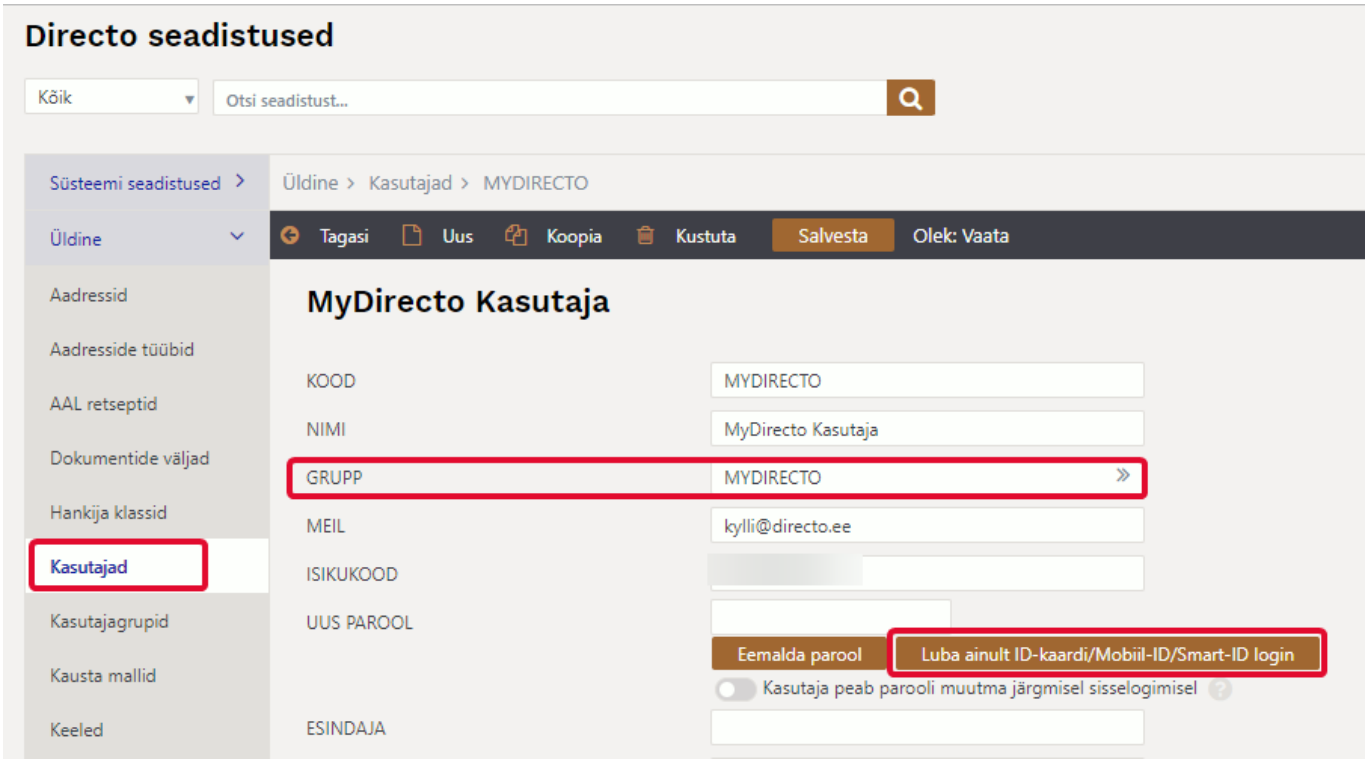
When MyDirecto is activated, the MyDirecto setting on the employee card is switched to YES if the following conditions are met:

- the `Belongs to personnel` option on the employee card is YES
- the personal identification code is filled in
- the employee card is not closed

If you want to remove MyDirecto YES from all employee cards, you can do this under `Finance reports → Maintenance → Robots → MyDirecto off`. If you want to set it back for everyone, you can do this on each employee card separately or by contacting our customer support.

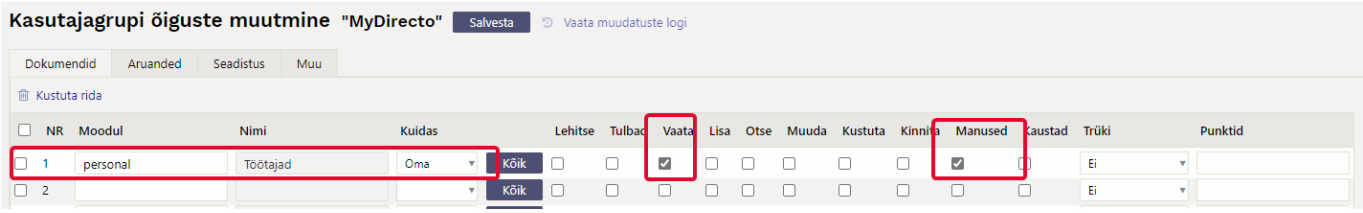
When MyDirecto is activated, a new group `MyDirecto` is added under the user groups.

Under the user settings, you must assign the employee the user group named MyDirecto and allow the employee only ID login.

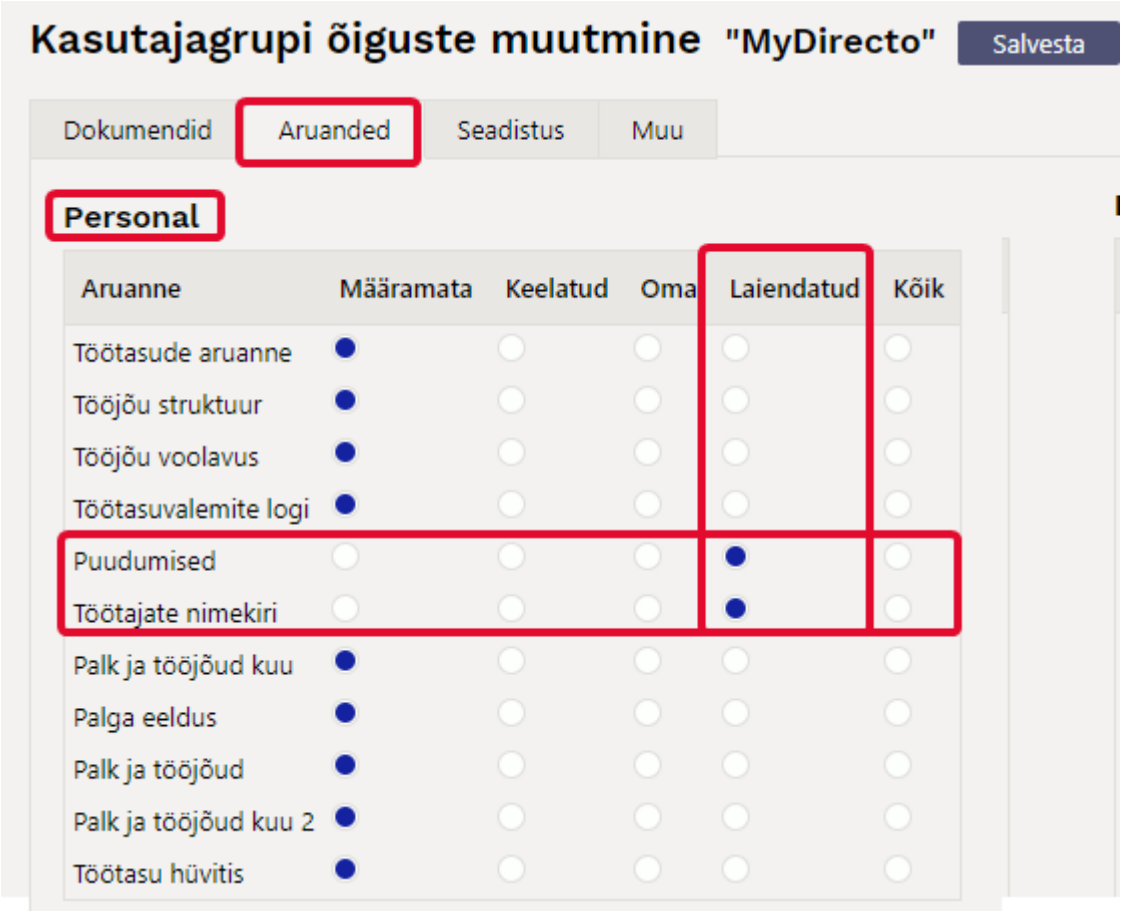


If the user already belongs to some group, then the following permissions must be added to that group:

`Documents → Employees` „Own“ category permissions „View“ and „Attachments“

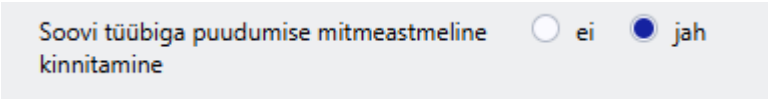


`Reports → Personnel` **Absences** and **List of employees** `Extended` permission



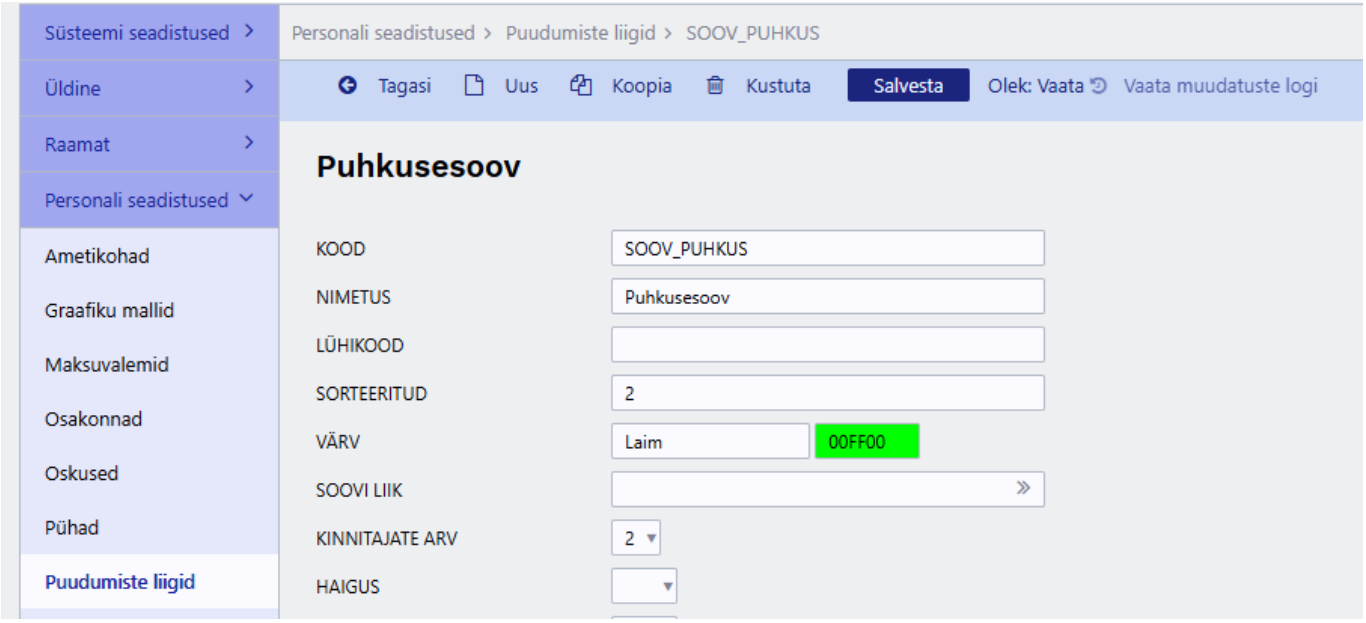
Configuring request types

With new developments, it is now possible to add up to 2 approvers to a request type for vacations if needed. For this, the system setting below must be YES. After saving, the required field will appear on the request types you create.

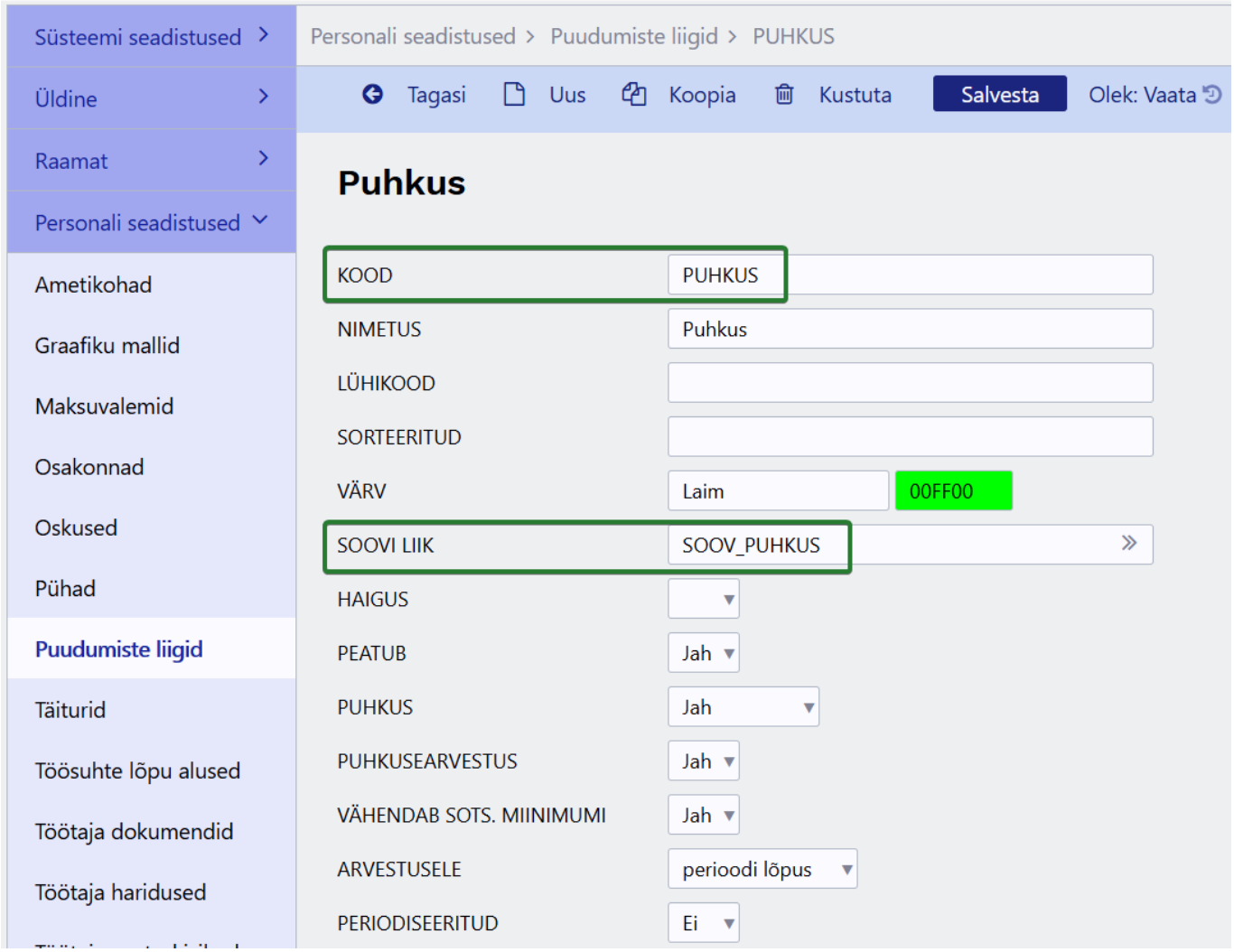


In order for employees to be able to submit absence requests, you need to add request types to the absence types.
You can add absence types here: `Settings → Employee settings → Absence types → Add new`

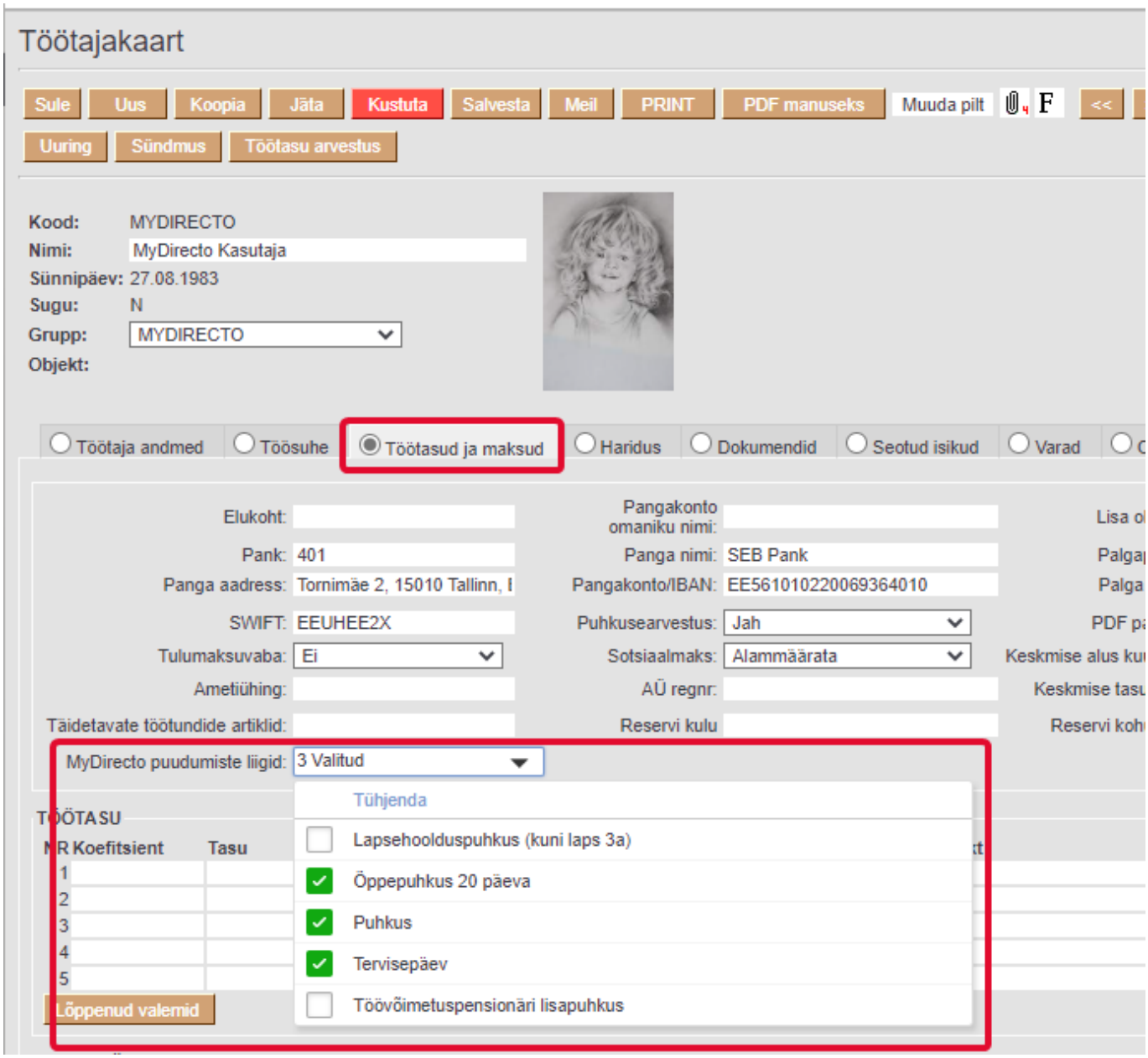
Add a new absence type. Assign it a code and a name. In the „Sorted“ field, you can add an order number by which the absence types are ordered under vacations in MyDirecto. You can read more about absence type settings here: Puudumiste liigid.



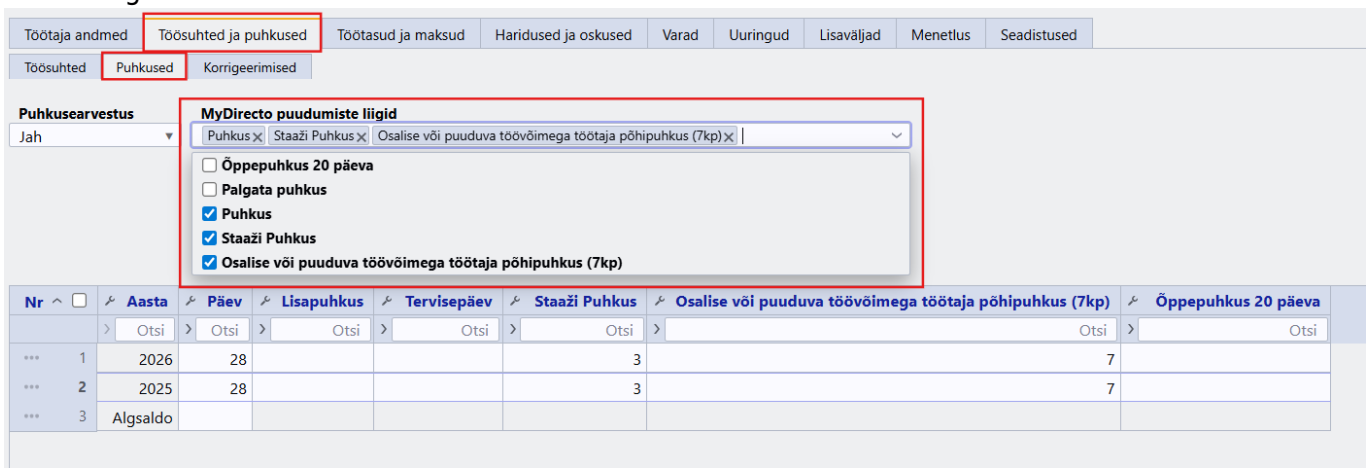
Link the created request type with the actual absence type via the `Request type` field.



On the employee card, it is possible to configure which absence requests the employee is allowed to submit in MyDirecto. To do this, open the employee card and go to the `Salaries and taxes` tab, where you make the desired selections in the `MyDirecto absence types` option. If you make no selection, all types are shown to the employee.



New design



With the Mass import module, it is possible to add the desired selections to all employees at once. In the Mass import module, select `Employees` as the table and add `Code` and `MyDirecto absence types` from the fields to be imported. In Excel, fill in two columns - in the first enter the employee code and in the second the codes of the absence **request types** as a comma-separated list (do not

add spaces).

Once an absence is accepted, by default it cannot be changed afterwards in MyDirecto. If you want the employee to be able to change an existing accepted absence, then you must enable the setting `A confirmed absence can be changed in MyDirecto` in the system settings.

Only an absence that meets the following conditions can be changed:

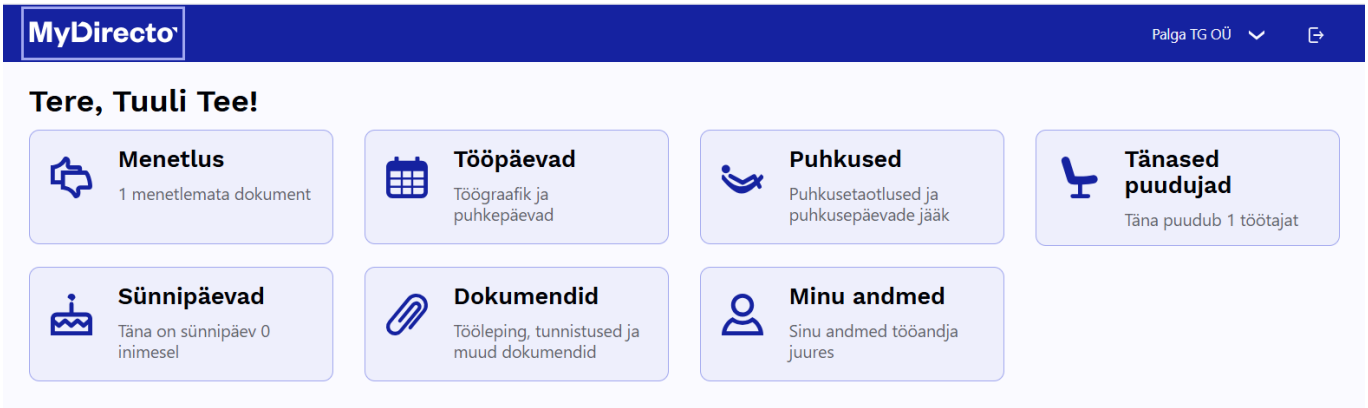
- the start date of the absence is not in the past
- the absence is not calculated (the absence document has no value in the `Salary calculation` field)
- the absence document is not confirmed

MyDirecto features

Watch the video introducing MyDirecto's features:



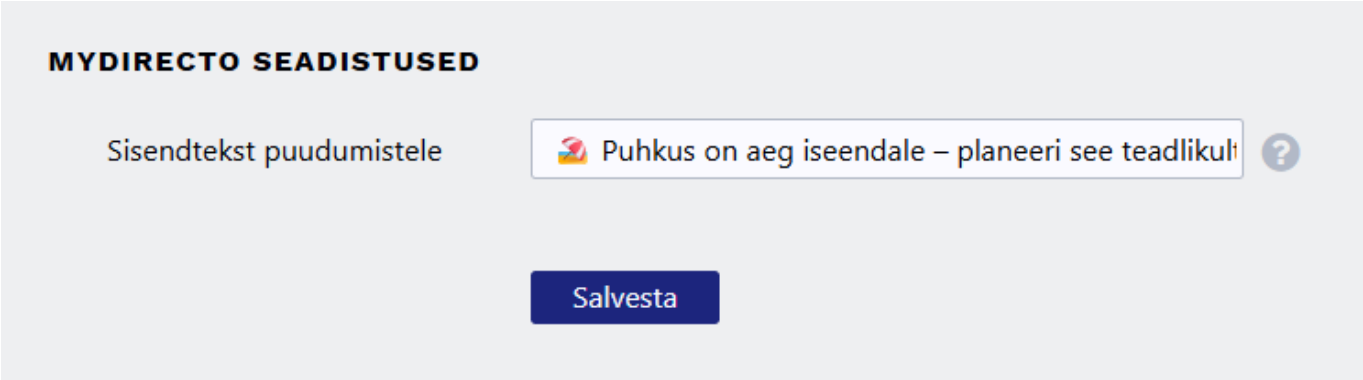
In MyDirecto, the employee has the features shown in the image below:

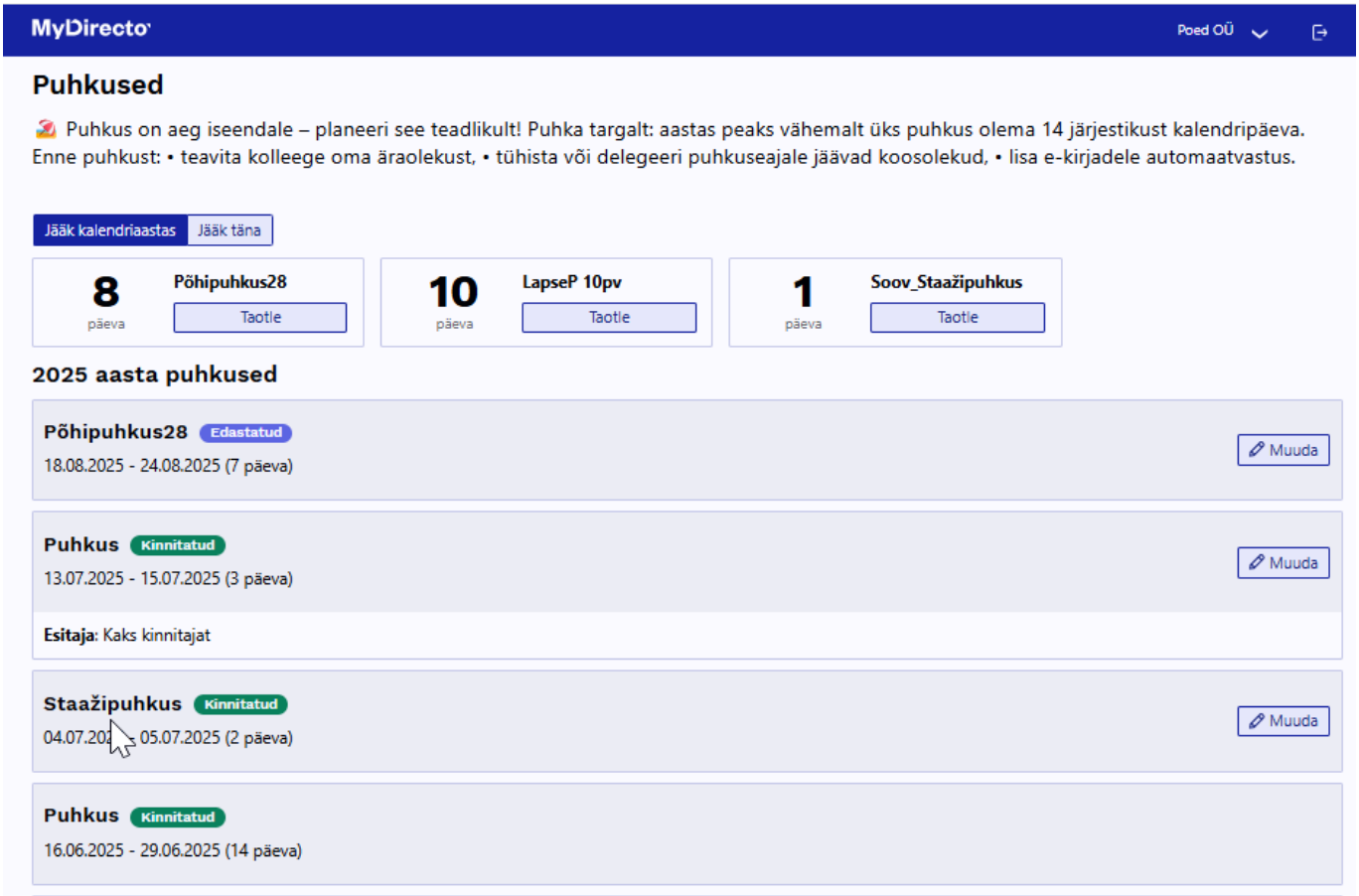


When the employee navigates into the submenus, to get back to the main menu they need to click on the MyDirecto icon.

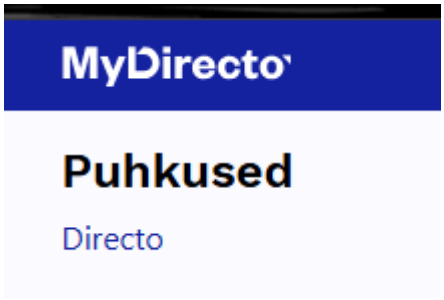
Vacations

Vacation requests are used for planning one's own vacation. Here the employee can see their planned vacations and submit requests for their future absences that the company offers to its employees. The manager reviews these - checks for overlaps and, if necessary, assigns a suitable substitute. If necessary, they reject the vacation request and send it back to the employee for replanning. With the appropriate settings, the employee can later change or cancel the vacation request if needed. In addition, the employee can check their vacation balances as of a specific day or the end of the calendar year. The text at the top of the vacation requests can be entered in the system setting `Input text for absences`.

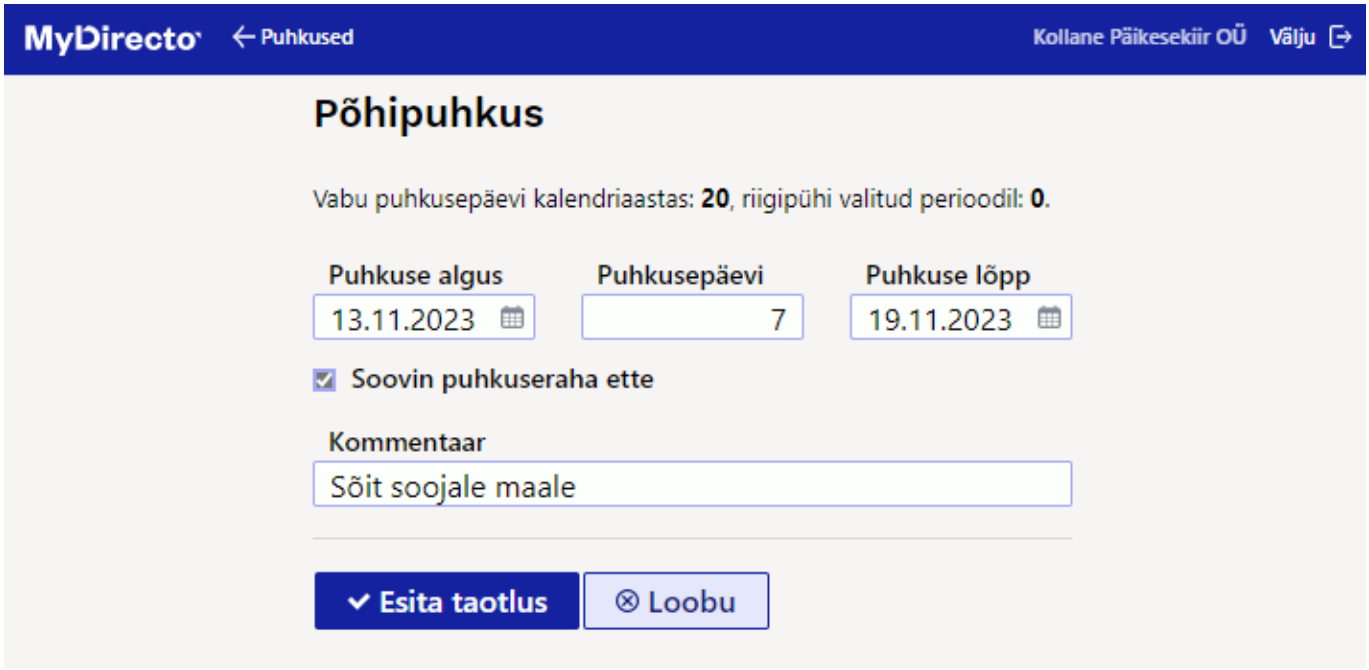




The text at the top of the vacation requests can also be added as a link that opens another page, for example the internal vacation rules or similar. To do this, add `<a href=` at the beginning of the link and `>Link title</a>` at the end of the link.
For example like this: `<a href=https://directo.ee>Directo</a>`
As a result, the Directo link is displayed like this:



Submitting vacation requests



The employee adds the desired absence period. It can be entered in two ways:

1. The employee enters the absence start date and how many calendar days they wish to be absent - in this case Directo adds the end date automatically.
2. The employee enters the absence start and end dates - in this case Directo calculates the calendar days of absence automatically.
3. If a minimum length is set in the absence type settings, Directo warns about an absence shorter than the minimum length but does not prevent the request from being entered.

When submitting the request, the employee can also specify whether they want the absence pay in advance or not.

The **Comment** is a free-text field and you can enter additional information for the approver of the absence request there.

An absence request cannot be entered into the past.

When entering an absence request, Directo checks the period for overlaps with existing absences.

When submitting an absence request, Directo checks the limit balance for limited absences.

Changing an existing absence

An absence can be changed that does NOT meet the following conditions:

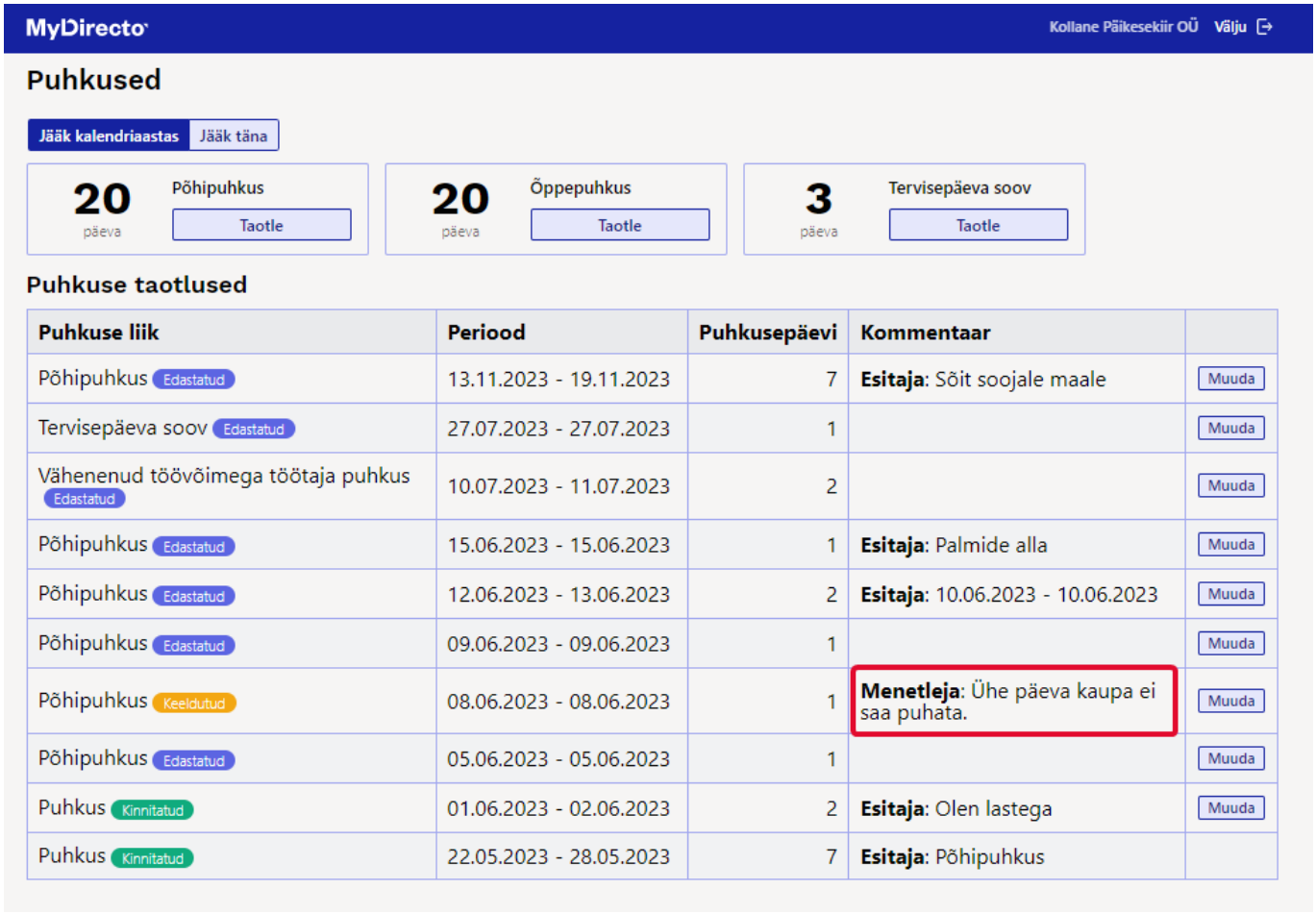
- If a calculation has been created for the absence (the absence document has a calculation number in the row's „Salary calculation“ field).
- If the start of the absence is in the past relative to today's, i.e. the modification date.
- If the absence document is confirmed in Directo

Rejecting a submitted request

If the requested absence cannot be accepted, then upon pressing the `Reject` button the approver must also enter a reason why the request was not confirmed.

The comment added by the approver is added to the absence and is also displayed to the employee in the MyDirecto portal.

A rejected vacation request does not reappear for approval, so if desired a new vacation request must be created.



Today's absentees

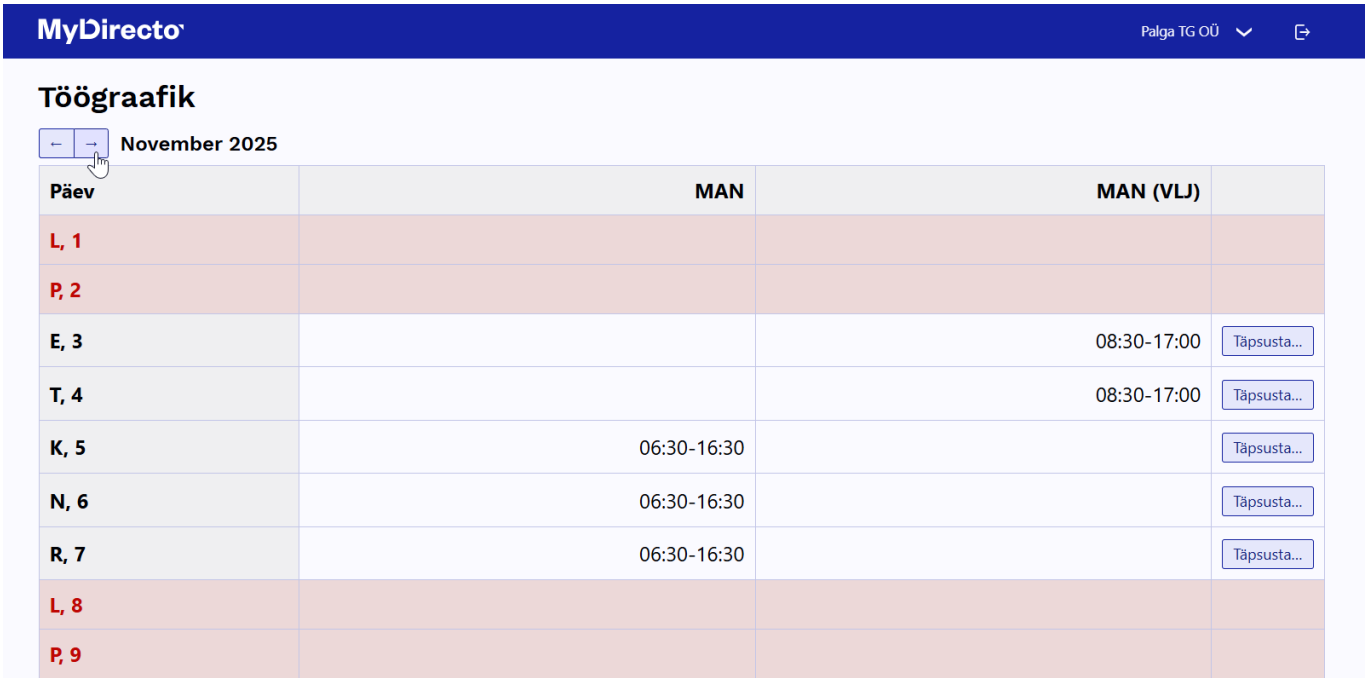
In the MyDirecto today's absentees block, we display coworkers who are absent today, this month, and in future months. The view can be changed with the little arrow in the top left corner. Past

absences are not displayed. Unconfirmed vacation requests are labeled „unconfirmed“. Employees are shown according to the employee's permissions and the setting of whether employees are displayed in MyDirecto by object or by department. If you want the employee to see the absences of all other employees, you must grant the Absences report permission to view ALL employees. In that case „own“ or „extended“ permission is not sufficient.
Absentees do not show employees who have long-term absences (the absence type has the setting `In structure` on NO).



Work schedule in MyDirecto

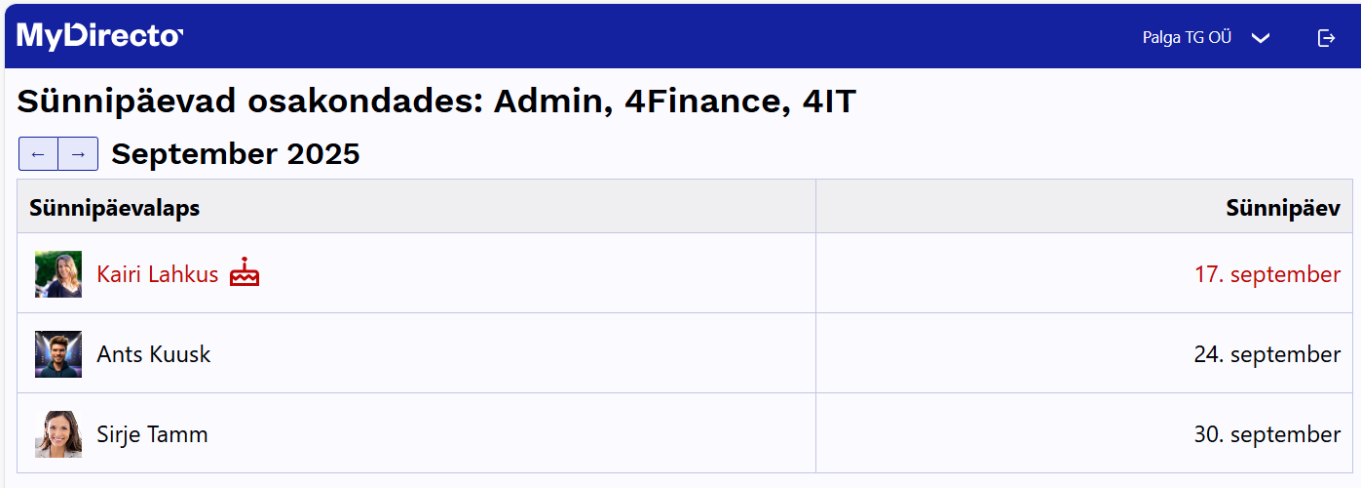
On the work schedule subpage, the employee can see the times they have been scheduled to work. Working on different objects is displayed in different columns. The employee has been given the option to also specify their working times by writing their own comment next to the working time.



Birthdays

Here you can see coworkers' birthdays. Similar to future absentees, it is possible to view, in addition to the current month, the birthday people of the following months. If showing the birthday person's

age is enabled in the settings (In MyDirecto the age is shown on the birthday - no / yes), the age is displayed after the employee's name. If you want the employee to see the birthdays of all other employees, you must grant the List of employees report permission to view ALL employees. In that case „own“ or „extended“ permission is not sufficient.

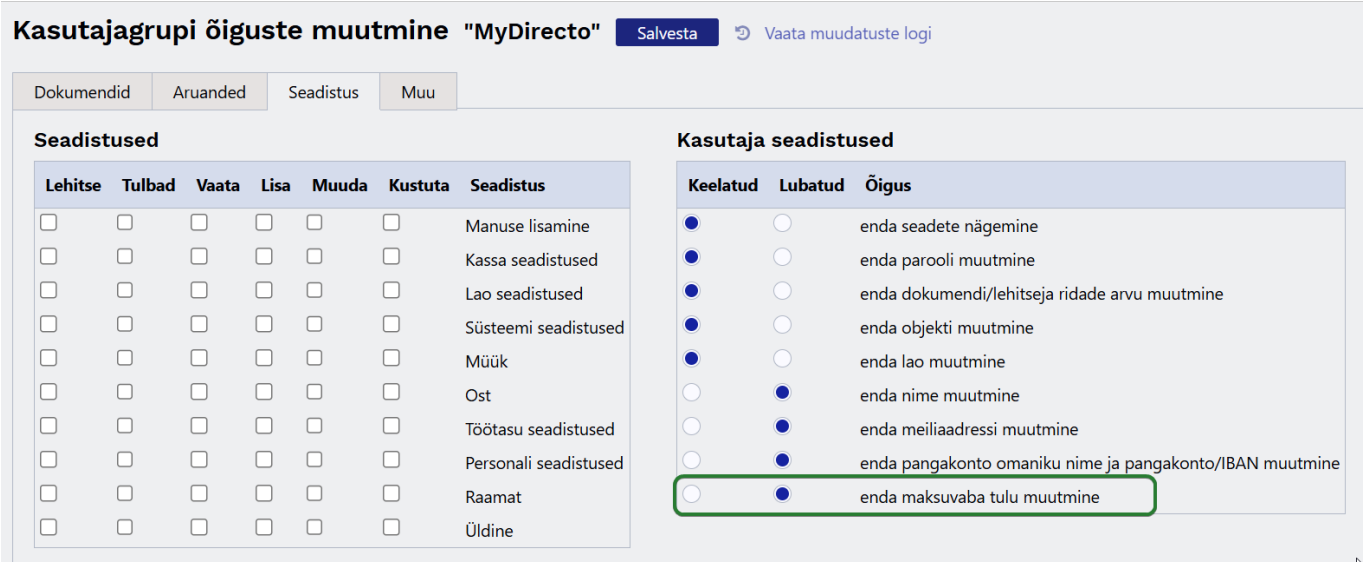


My data

In the „My data“ block, you can change your personal data and it is saved directly to the employee card. Changing the tax-free income requires a separate permission, which you can read about in the next block.

Changing tax-free income in MyDirecto

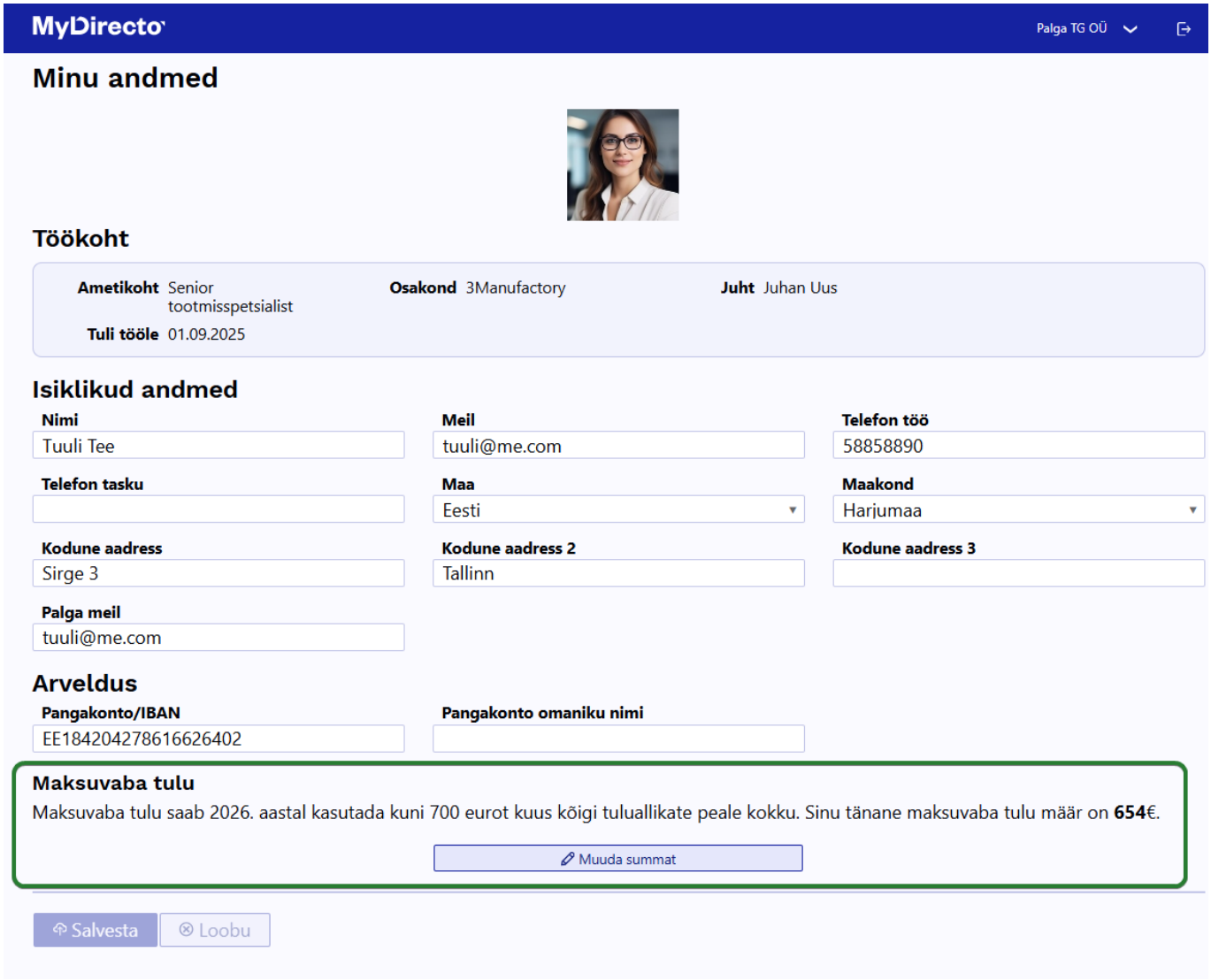
From the new year, the way tax-free income is calculated changes – regardless of the amount of salary, everyone can use 700 euros of tax-free income per month, i.e. 8400 euros per year. A new option is available in MyDirecto:
The employee sees their current tax-free income amount and can submit a new request to the employer, which applies from the January 2026 payouts. **A precondition for using tax-free income is that in the „Salaries and taxes“ tab of the employee card, „YES“ is selected in the „Income tax free“ field. In order for the employee to be able to change their own income-tax-free amount, the relevant permission must be granted under the user permissions.**



Collecting employee requests via MyDirecto means a clear, verifiable, and secure process for the employer — a record identifiable from the log remains of every employee's request, along with a valid signature that meets the requirements and simplifies later verification. **The income-tax-free amount can be changed up to 5 calendar days before the start of a new month.**

On the employee card you can then **initiate the printout of the tax-free income application** and **send it to the employee for digital signing** via our Directo Digiallkirjastamine solution.

You can view and, if desired, change your tax-free income amount in the MY DATA block.



To change the amount, press the Change amount button. A new window opens with the following options.



Calculate at the statutory rate - The maximum tax-free amount allowed by law for the current year. In 2026 it is 700€ and for an old-age pensioner 776€. If the amount of tax-free income changes in the following years, you do not need to submit a new application; the maximum statutory rate

applies automatically.

Calculate at my rate - Enter your desired tax-free amount, which is not greater than the current maximum allowed rate. Enter the amount in the `Desired tax-free income (€)` field.

Do not calculate tax-free income - the tax-free income is zero.

Desired tax-free income (€) - If you selected `Calculate at my rate`, enter your desired tax-free income amount here.

Applies to payouts starting from - the month of payouts from which the change takes effect.

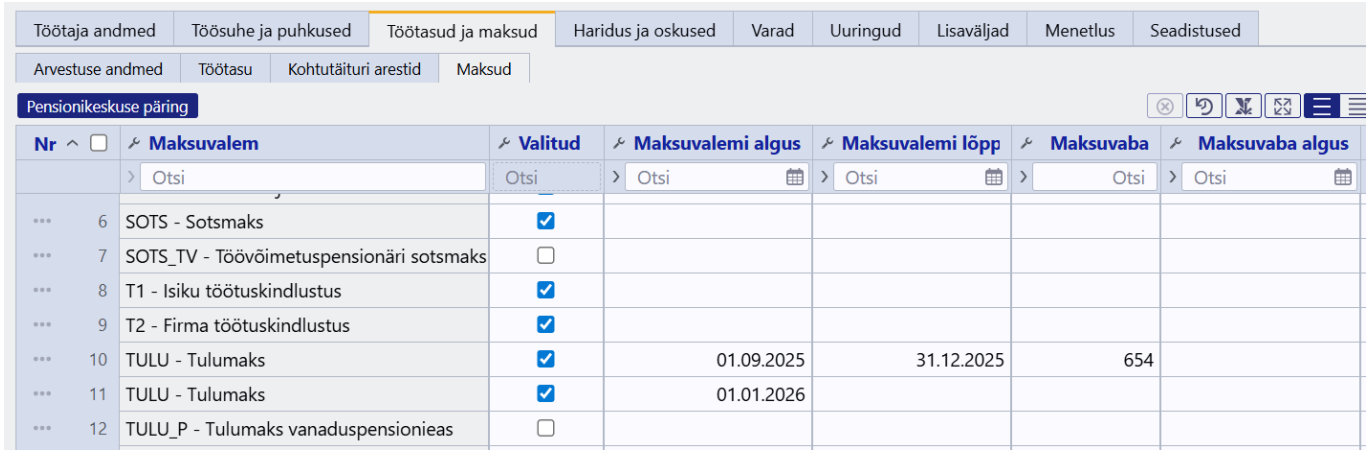
The income-tax-free amount can be changed up to 5 calendar days before the start of a new month.

When a new tax-free income is added in MyDirecto, MyDirecto reports this with a green success notification of the operation



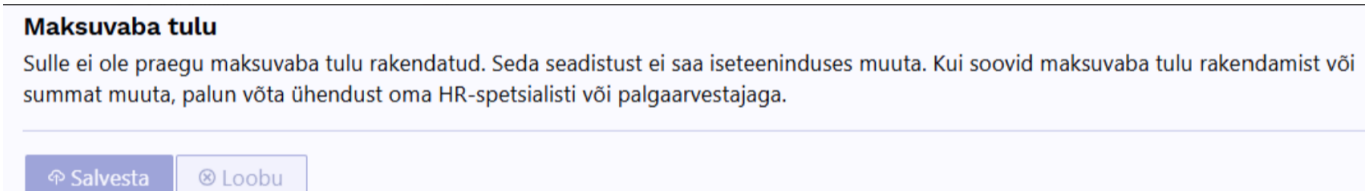
and in Directo a `Tax formula end` date is created on the valid income tax row (the day before the new start) and a new valid income tax row, which has the new `Tax formula start` filled with the selected start date and the `Tax free` field filled with the rate selected by the employee.

The result is as follows:



Nr	Maksuvalem	Valitud	Maksuvalemi algus	Maksuvalemi lõpp	Maksuvaba	Maksuvaba algus
6	SOTS - Sotsmaks	☑				
7	SOTS_TV - Töövõimetuspensionäri sotsmaks	☐				
8	T1 - Isiku töötuskindlustus	☑				
9	T2 - Firma töötuskindlustus	☑				
10	TULU - Tulumaks	☑	01.09.2025	31.12.2025	654	
11	TULU - Tulumaks	☑	01.01.2026			
12	TULU_P - Tulumaks vanaduspensionieas	☐				

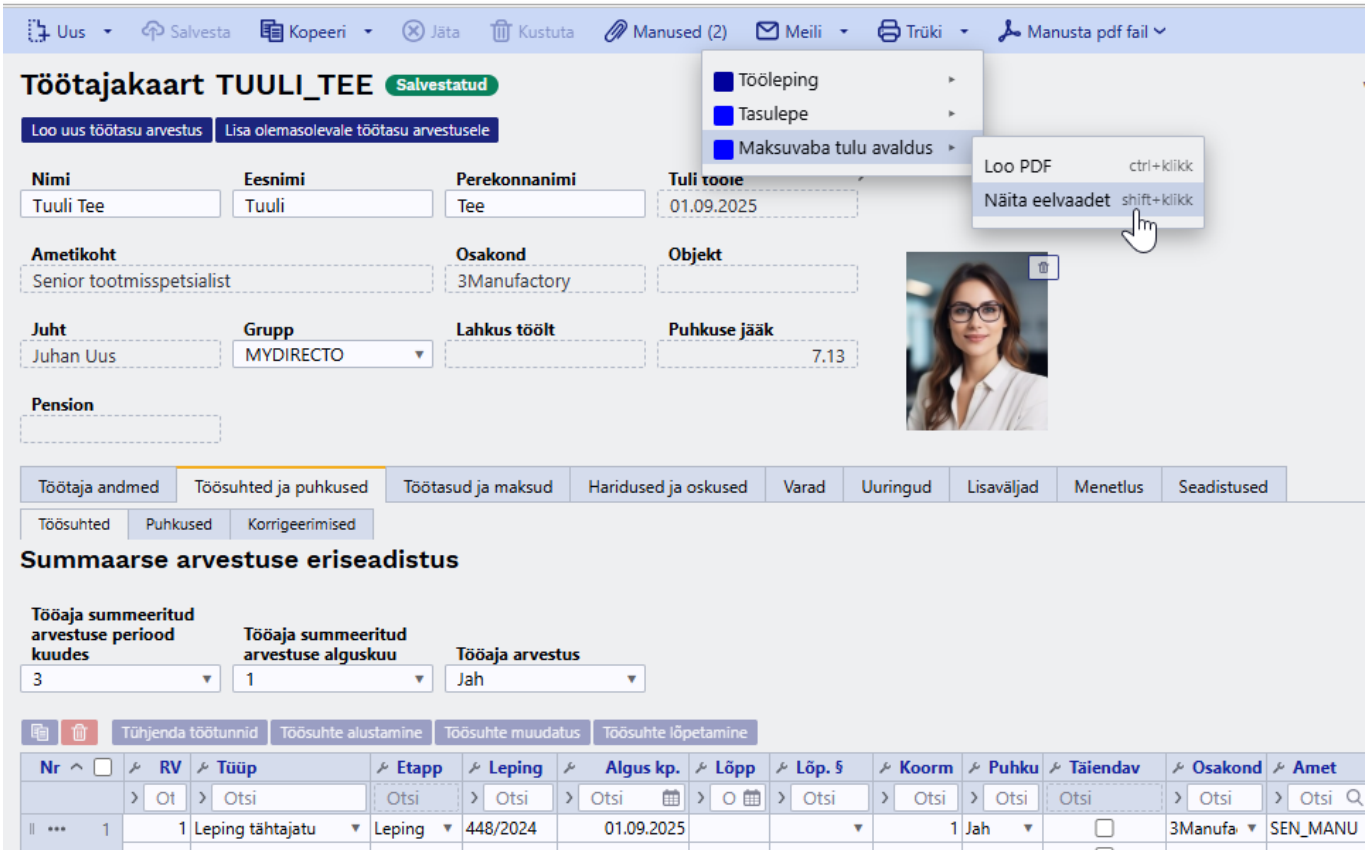
If the following message appears, then the `Income tax free` option on the employee card is on **No** or there is no valid income tax formula.



Tax-free income application

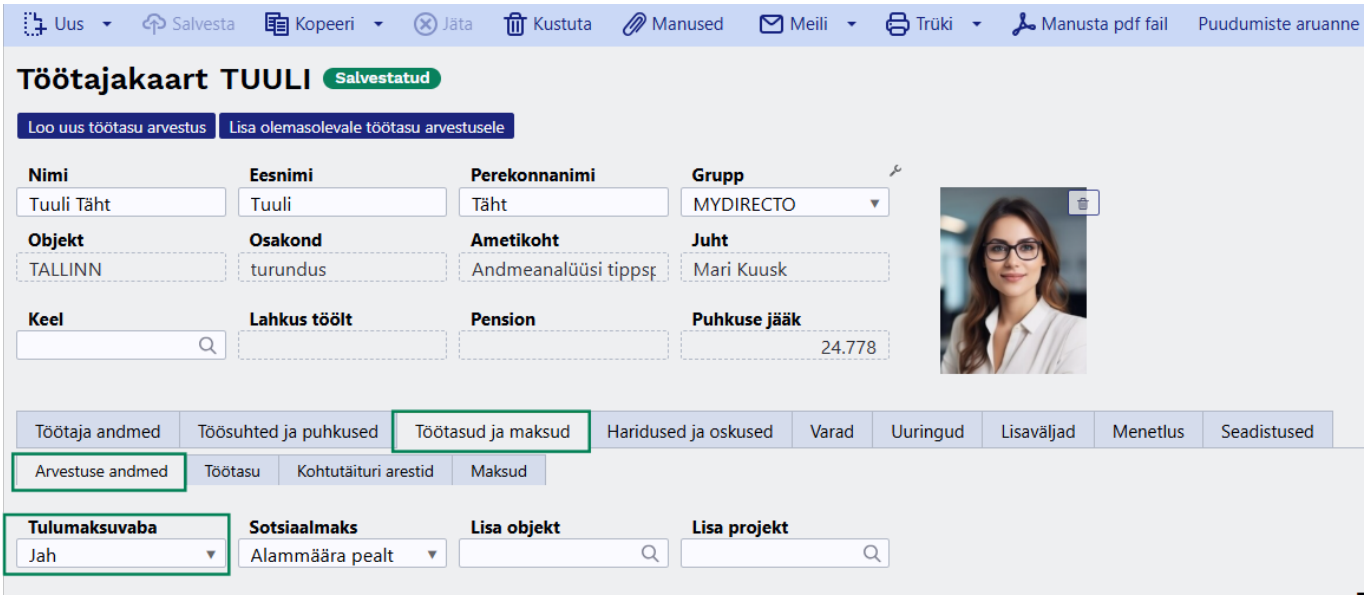
We also added a default printout to the employee card where the employee's signature can be taken if needed, if the application is desired to be digitally signed or on paper. The printout takes the new tax-free income info entered by the employee from the `Tax free` field and the start date from the `start` field. Read more about inviting for signing on the Directo Digital signing page.

By default the printout only takes into account the tax formulas **TULU** and **TULU_P**. If you want a printout for other formulas, you can order a paid change for your formulas.

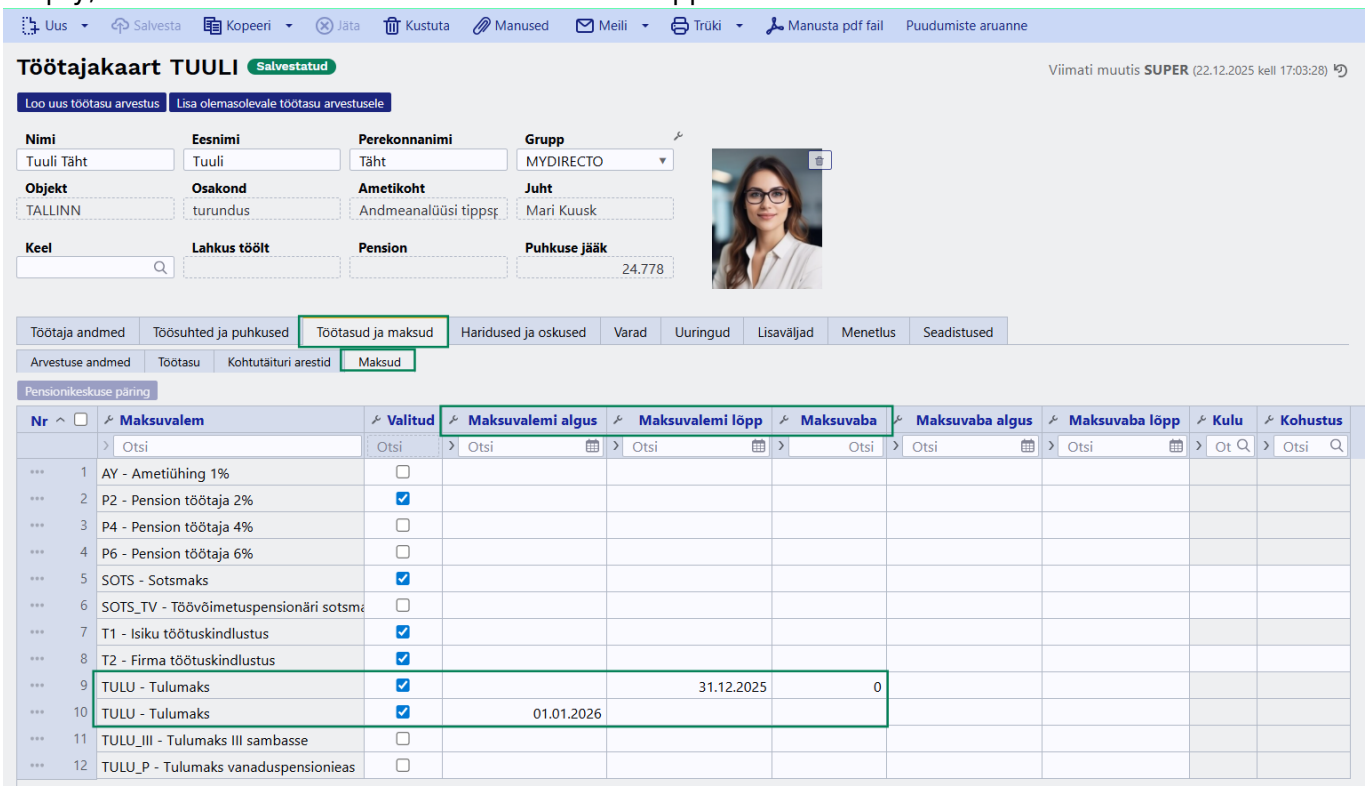


Income tax free No -> Yes

If the `Income tax free` option has so far been on **No** on the employee card and now tax-free income is desired to be calculated, then `Income tax free` should be changed to the **Yes** option.



In addition, the taxes section on the employee card must be changed.
On the income tax row, mark the `Tax formula end` date and `Tax free` **0** so that the past remains without income tax exemption. On the new income tax row, add `Tax formula start` and also the desired tax-free amount. If tax-free income is not desired to be used, then leave the `Tax free` field empty, in which case the maximum free amount applies.



Documents

Documents attached to the employee card are also visible to the employee in MyDirecto and it is possible to download them again from there.



MyDirecto Proceeding

MyDirecto Proceeding is a **mobile-friendly solution for quickly proceeding documents**, but it can also be conveniently used on a computer. It allows users to sign or reject documents without logging in to Directo or using a computer.

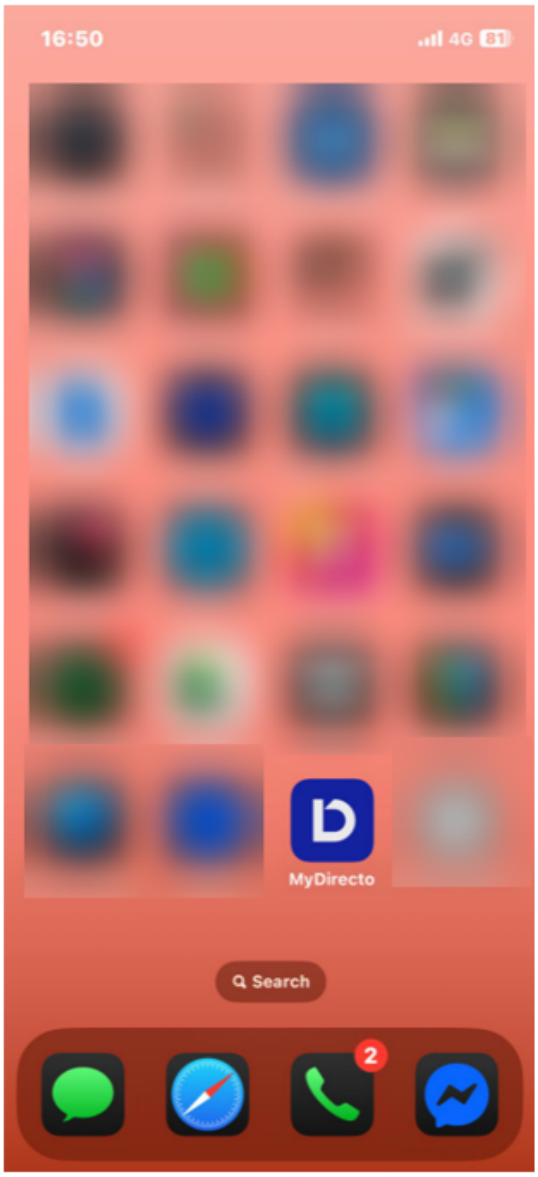
Currently, in MyDirecto you can proceed **purchase invoices and expenses**

Row-based proceeding is **not available** in MyDirecto.

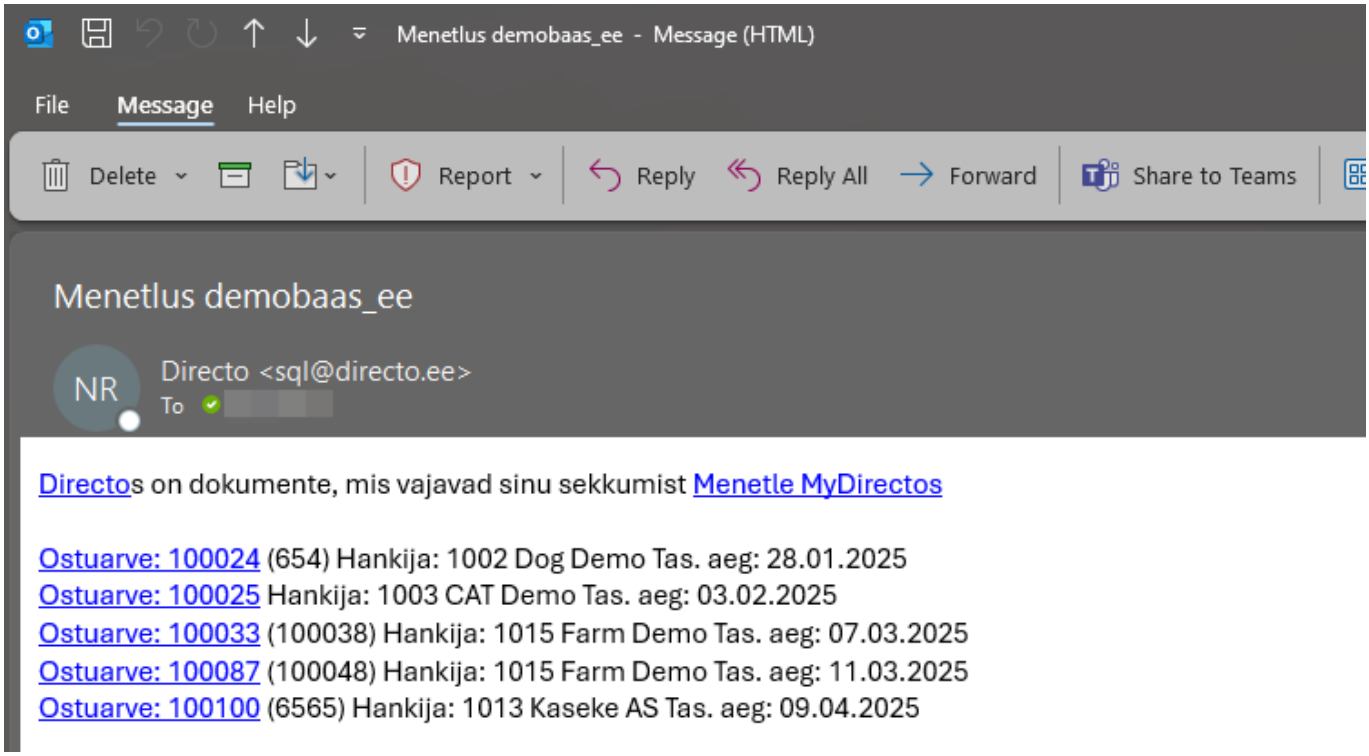
Entering MyDirecto Proceeding

You will find MyDirecto Proceeding in the **MyDirecto environment**. MyDirecto is an environment aimed at company employees for conveniently managing their own data. You can log in to MyDirecto using ID login (ID card, Mobile-ID, Smart-ID) at **https://my.directo.ee**. You can add the MyDirecto Proceeding link to your mobile home screen or as a bookmark to quickly access MyDirecto Proceeding.





If you use the email notification procedure, then click **the link Proceed in MyDirecto directly in the email**. The email is sent when MyDirecto is active in the base and for the user. If you are also a Directo user, then the email also contains a direct link to the Directo Proceeding report. If the setting „Proceeding notification does not send direct references to documents“ is set to „NO“ (General > Confirmation precondition > Proceeding), then the email also contains direct references to each purchase invoice separately.



What can the user do in MyDirecto Proceeding?

- See documents **directed to them for signing**
- **Sign documents**
- **Reject documents** with a **comment**
- **Move between documents**
- **Search and filter** documents

Only those documents where the user is **designated as a signer** are displayed.

The **content of documents cannot be changed** (e.g. changing the account, object, project, etc.).

If you have multiple bases in MyDirecto, you can **switch bases quickly** without logging in again. This means you get immediate access to another company's Proceeding, which makes switching between bases very convenient.



MyDirecto Proceeding settings

Read the guide on how to take MyDirecto into use.
Read the Proceeding guide, since the same rules apply for using MyDirecto Proceeding.

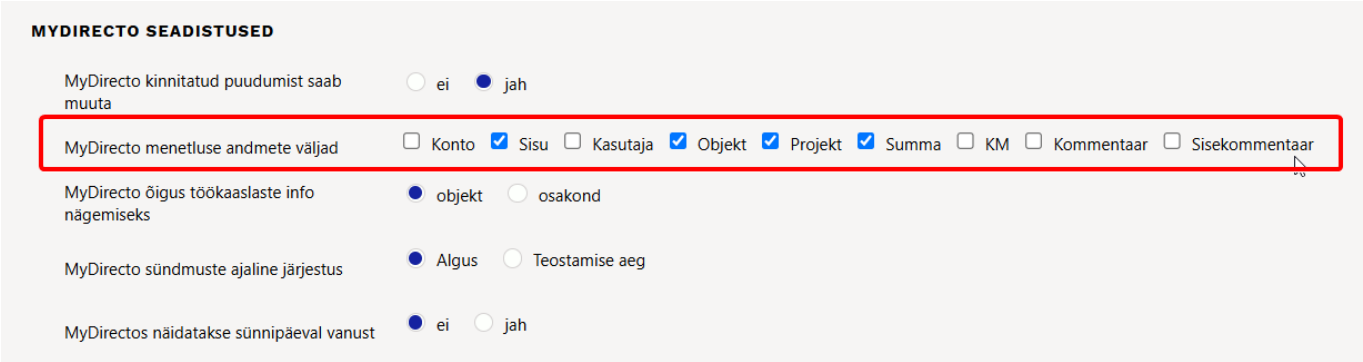
Watch the tip video on configuring proceeding:



Video

You will find the settings specific to MyDirecto Proceeding here:
`System settings > General settings > MyDirecto settings`.

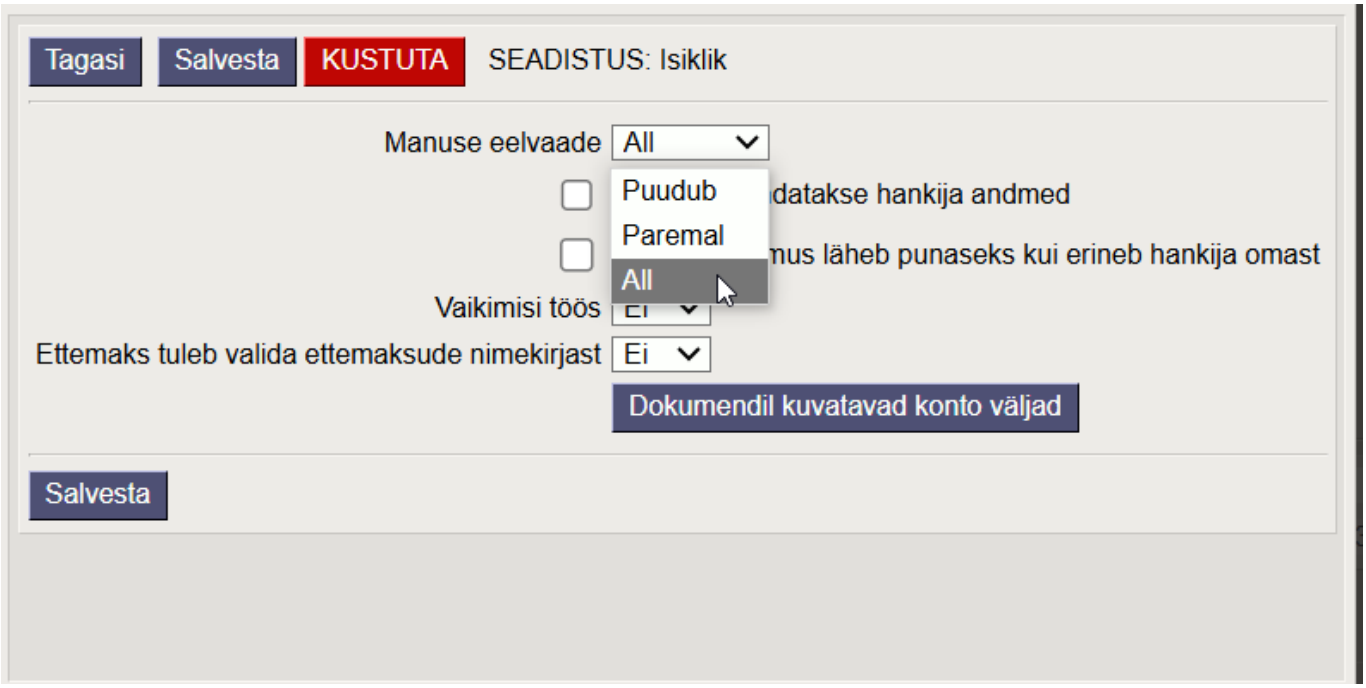
- Here you can choose which **purchase invoice fields** are displayed in the Proceeding detail view.



- The user or user group must have the **Proceeding report permission** added. Read more about configuring report permissions.



- Under the **purchase invoice fine-tuning**, the attachment preview must be enabled, since otherwise the document preview is not visible in MyDirecto either.



How MyDirecto Proceeding works

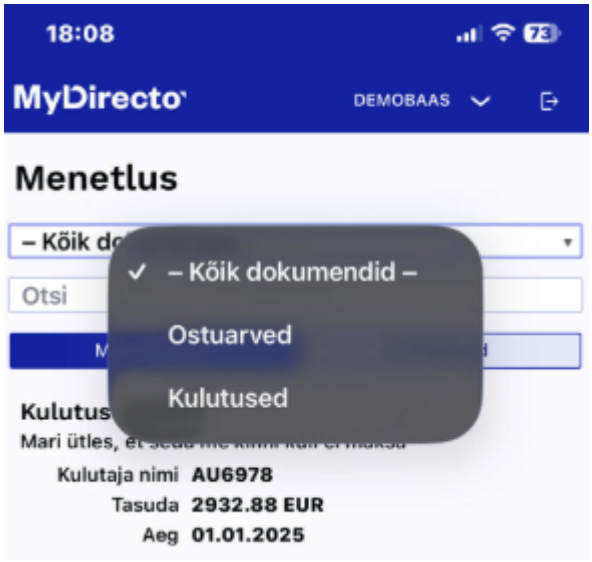
Watch the tip video on how to proceed invoices on a smart device:

Video

Document selection

In the Proceeding header you can select which documents are displayed:

- All documents (default)
- Purchase invoices
- Expenses

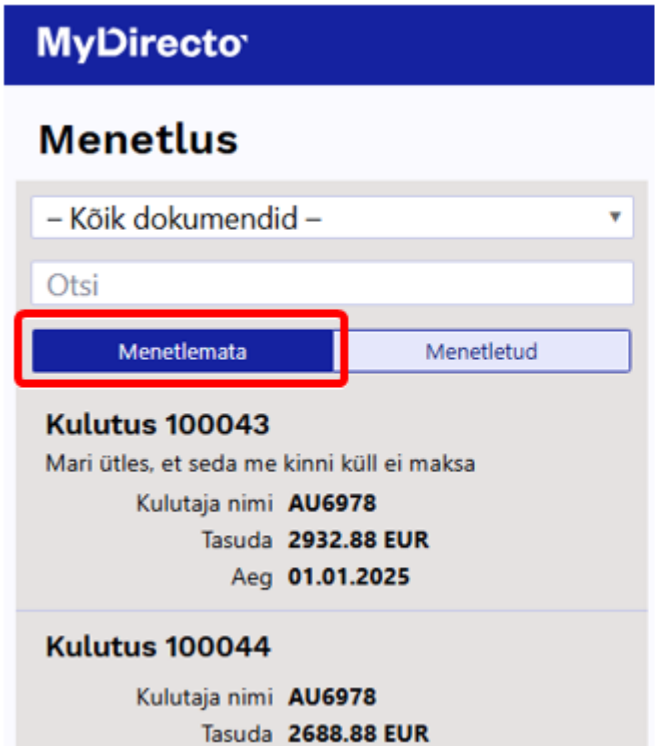


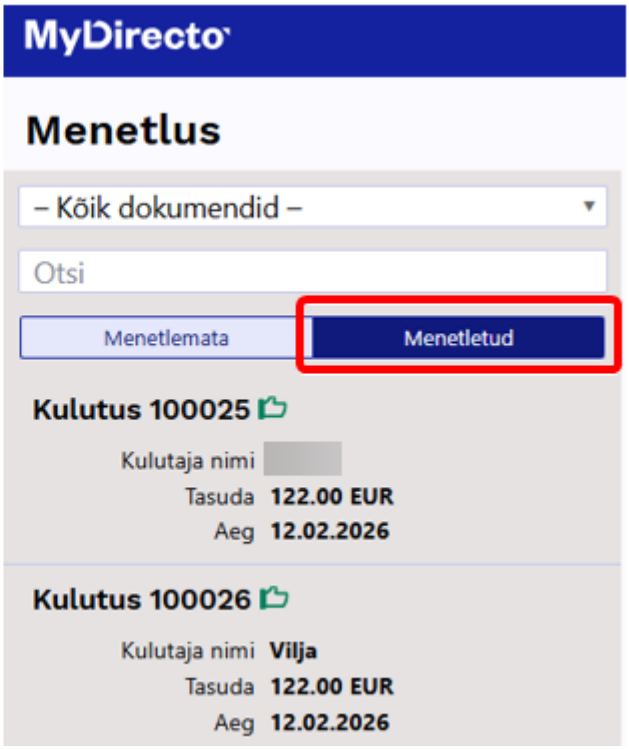
Proceeding views

Documents are displayed in two separate views:

- **Not proceeded**
- **Proceeded**

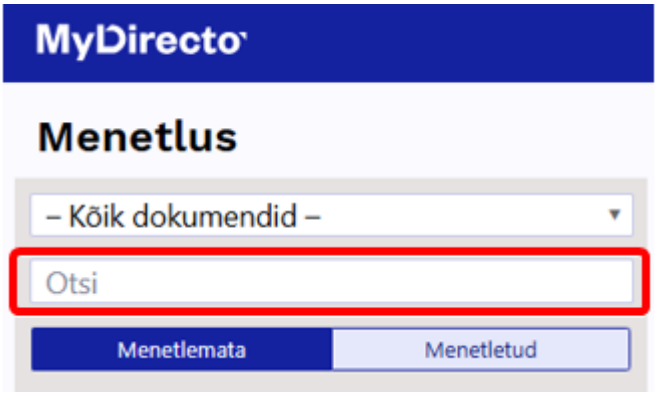
Invoices are ordered by **due date**, starting from the oldest.





Search and filtering

Documents can be searched and filtered based on all data. This allows you to quickly find a specific document from a large list.



Document detail view

Pressing on a document opens the detail view, where the user sees:

- the document's PDF (**tab 'Invoice'**)
- the table of the document's data (**tab 'Data'**)

In this view you can:

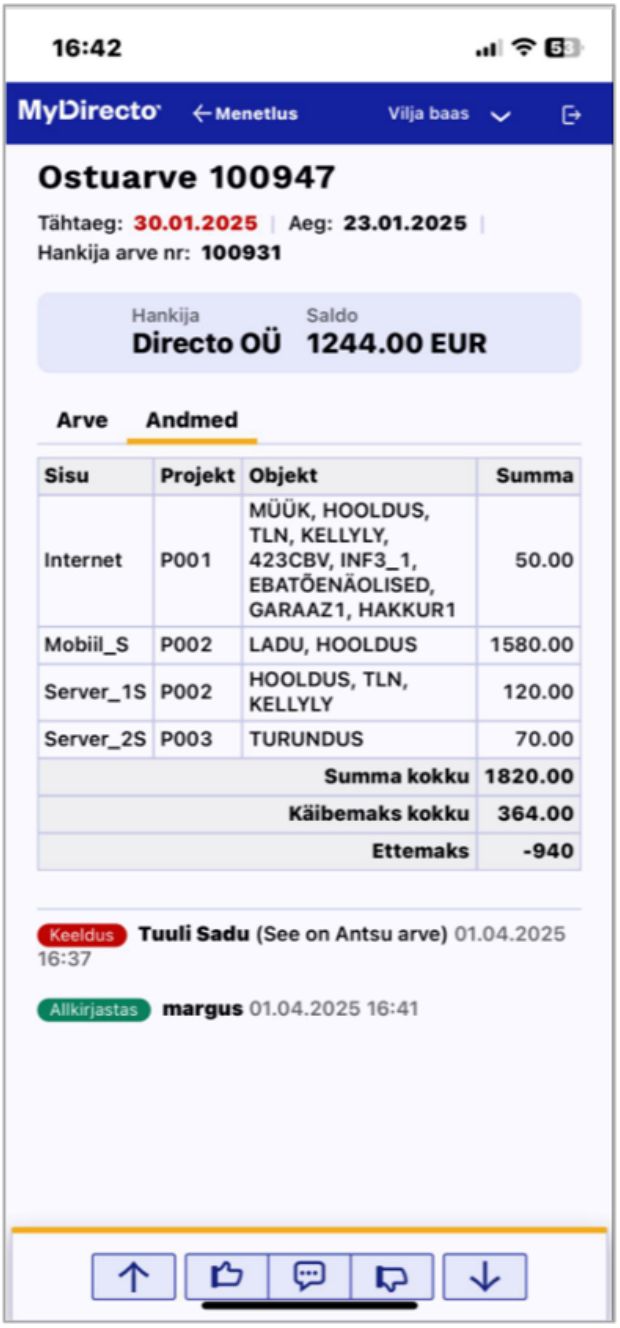
- sign the document
- reject the document (by adding a comment)
- move to the next or previous document

The table's **„Total amount“** row shows the amount excluding VAT. If a prepayment has been used in the settlement, a separate row **„Prepayment“** is displayed, which reduces the invoice balance. **„Total VAT“** is shown on a separate row. After the data table, you can see which users have already signed the invoice or rejected it (along with the comment).

At the bottom are the Proceeding action buttons:

- **Arrow up** - you can move directly to the next invoice
- **Thumb up** - signing (a green record is created)
- **Speech bubble** - adding a comment for the purpose of rejection
- **Thumb down** - rejection (a red record is created)
- **Arrow down** - you can move directly to the previous invoice

Once an invoice is signed or rejected, it moves to the 'Proceeded' tab in the invoice list view and **remains there for 1 month or until the purchase invoice is confirmed**. Once an invoice is signed or rejected, the next invoice to be proceeded automatically comes up. If an invoice is signed, it can also be reversed. To do this, find the invoice on the 'Proceeded' tab and press thumb down, which creates a rejection.





If the invoice PDF preview is not displayed, then in the user or user group permissions you must add the „View“ permission for Attachment adding under the Settings tab.



Single and mass proceeding

Single proceeding

Documents can be proceeded one at a time. After each confirmation, the user is automatically directed to the next document.

Mass proceeding
At the end of the document list there is a **„Confirm all (n)„** button.

- The number in parentheses on this button shows how many documents are currently actually signable.
- Mass confirmation applies only to those documents whose detail view has the **thumb active**, i.e. the user has the **necessary points to sign** them.



Sequential and parallel proceeding

In MyDirecto, both of the following work:

- sequential proceeding
- parallel proceeding

In addition, the setting works: „In sequential proceeding, proceeders are displayed in chronological order (instead of the usual point weight)“

Row-based proceeding is not possible in MyDirecto.

Substituting a proceeder

- The substitute must have as many or more points than the person being substituted
- In practice this means that a superior can proceed on behalf of a subordinate

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