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Getting Started

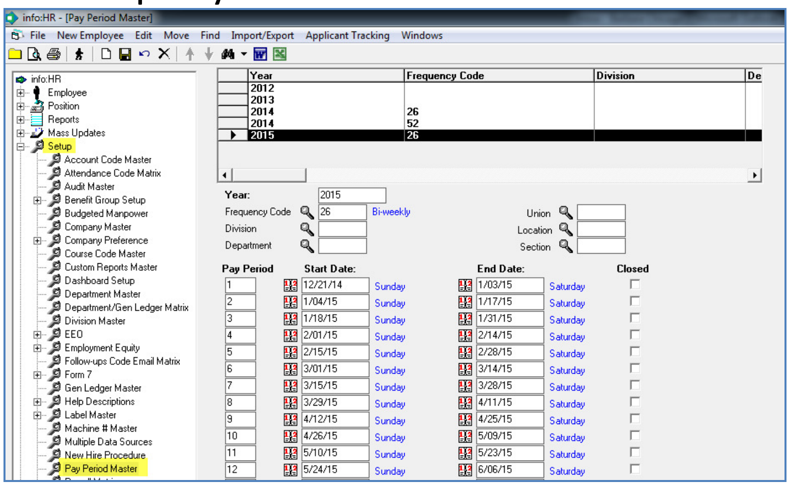
Human Resource Functions

Prior to using Timesheets there are some housekeeping items which must be completed by Human Resources and maintained on a regular basis to ensure the module functions properly.

Pay Period Setup

Pay Periods must be set up in info:HR so that Timesheets can function. Timesheets use the data in info:HR to create a timesheet format in accordance with the company's pay periods.

Select **Setup** ➧ **Pay Period Master** from the info:HR menu.



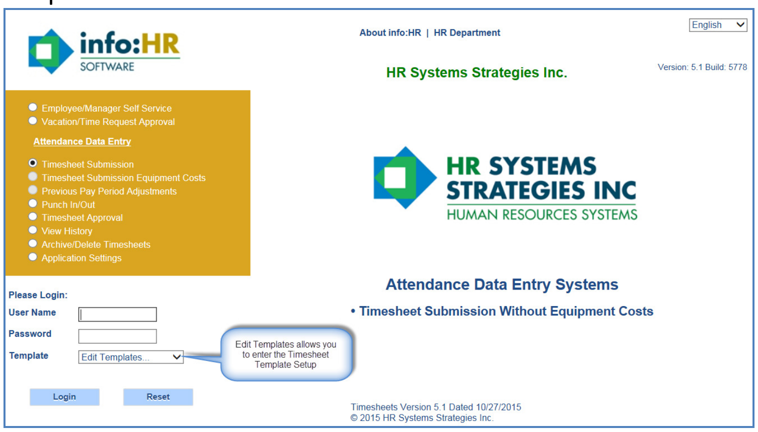
- Click the **New** record button.
- Change the **Year** and select the **Number of Pay Period**.
- In the **Pay Period** box enter the number "**1**" for the first pay period of the year. In the **Start Date** box enter the first day of the first pay period of the year. NOTE: This date may be a previous year date. When you press the Tab key, the system will complete the remaining pay periods using the Start Date and Number of Pay Periods entered on the screen.
- Click **Save**.

Once a pay period is finished and all Timesheets have been submitted and approved, HR should close the Pay Period by clicking on the **Closed** check box. Prior to closing the Pay Period, run an Attendance and Entitlements / Timesheet Status report to ensure all Timesheets have been entered and approved.

Creating Timesheet Templates

Log in to Timesheets using your user name and password, making sure either **Edit Templates** has been selected in the drop down menu or the **Edit Timesheet Templates** radio button has been selected.

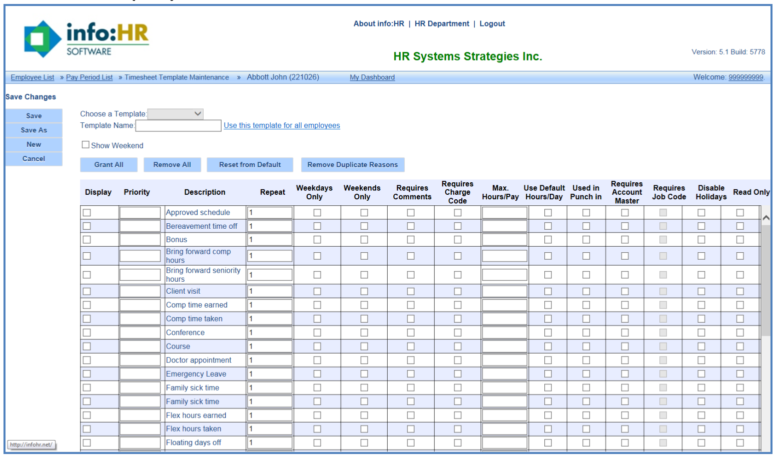
Drop Down Menu



Radio Button

Building a Template

To begin creating a Timesheet Template place a check in the Display box of the attendance codes you wish to display on the Timesheet.



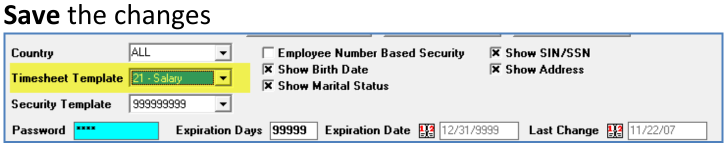
Button	Purpose
Save	Will save the Template under the name selected.
Save As	Allows you to save the Template with a different name.
New	Allows you to build a new Template.
Cancel	Undoes all entries.
Grant All	Will check mark all Attendance Reason Codes.
Remove All	Will uncheck all Attendance Reason Codes.
Reset From Default	Will reset the template to the default format.
Remove Duplicate	Will remove duplicate reason codes.
Show Weekend Check Box	When checked, weekend days will be visible on the Timesheets.

Headings	Purpose
Display	When checked, a row for the item will show up on the Timesheet.
Priority	Shows the relative order of the item on the Timesheet.
Description	Shows the description to be displayed on the Timesheet.
Repeat	How many times the description is to be displayed on the Timesheet.
Weekdays Only	When checked, the system will allow data entry on weekdays only.
Weekends Only	When checked, the system will allow data entry weekends only.
Requires Comments	When checked, the system will require the employee to enter a comment when recording hours.
Requires Charge Code	When checked, the system will require the employee to enter a Charge Code when recording hours.
Max. Hours/Pay	Sets a maximum number of hours an employee can record per pay period.
Use Default Hours/Day	When checked, the row is automatically populated with the hours per day of the employee.
Used in Punch In	When checked, the Attendance Code is restricted to use in the Punch in/Out module only.
Requires Account Master	This is used in the Punch In/Out module only. When checked, the user must select an Account Code from the drop-down list provided.
Requires Job Code	For Future Use
Disable Holidays	When checked, employees will not be able to record hours against the Attendance Reason on Statutory Holidays as defined in the Holiday Master.
Read Only	When checked, employees will not be able to record hours against this row. Hours from approved ESS requests will display in these fields.

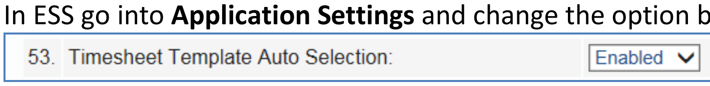
It is *recommended* that any changes to the Timesheet Templates be completed by HR only.

Attaching a Template to an Employee

- In info: HR under the **Setup / Security Master**
- Select the login user and enter the template name on the **BASIC 1** screen
- **Save** the changes



- In ESS go into **Application Settings** and change the option below:



- Click **Save Settings** at the bottom of the screen

When users log in, they will no longer be asked to select a Timesheet. If users can use more than one Timesheet Template, do not enter the default Timesheet in their Security Profile.

Initial Login Screen

Menu Selection	Purpose
Timesheet	Entries in this section will update the info:HR Attendance Master directly without the requirement of a supervisor approval. It is not recommended to activate this option for employees.
Timesheet Submission	Employees log into this section using their User Name and Password. This is where employees record hours in Timesheets. Entries in this section will be saved and submitted to the supervisor for approval.
Timesheet Submission Equipment Costs	Identical to Timesheets Submission, with the added feature of the ability to record hours associated to a specific machine and attach a cost.
Previous Pay Period Adjustments	This option is not available at this time.
Punch In/Out	Provides the ability to be used like a time clock where employees “Punch In” and “Punch Out” at the beginning and end of each day.
Timesheet Approval	This section is to be used by supervisors and managers to approve submitted Timesheets.
View History	Employees and supervisors have the ability to view Timesheet History.
Archive/Delete Timesheets	This section should only be used by HR to Archive Timesheets. **Note:** Timesheets cannot be recovered from Archive at this time.
Application Settings	This section holds all the settings for Timesheets. To be used by IT and HR Only.

Side Bar Menu Item Buttons

There are standard buttons used in all timesheets regardless of the type of Timesheet. Each type of Timesheet has a set of buttons unique to that Timesheet. Below describes the standard buttons found on each type of Timesheet.

Search Employees Buttons

Button	Purpose
Find	Used to bring up the Employee List. This button is only Available if the employee is logged in as a Supervisor.
Previous	Used to change the previous employee in the alphabetized List of Employees.
Next	Used to change to the next employee in the alphabetized List of employees.

Save Changes

Button	Purpose
Submit To Supervisor	Use to submit completed Timesheet to supervisor
View History	Used to view Timesheet History
Save & Don't Submit	Used to save the entries on the timesheet. This button will not submit the Timesheet to the supervisor.
View Punch In/Out	Use to view the Punch data.
Simple Timesheet	Use to view the Simple Timesheet data.
Cancel	Used to return to the last saved point.
Delete Timesheet	Used to delete the Timesheet.

Report Buttons

Button	Purpose
Print	Sends the Timesheet to the printer associated with the computer.
Excel	Sends the Timesheet to MS Excel for formatting or printing.

Switch To Button

Button	Purpose
Change Password	Pops up a window allowing the user to enter and verify a password. Passwords are encrypted and cannot be decrypted. Forgetting you password would require the administrator to go into info:HR and set up a new password for the user.

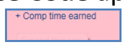
Display Details Buttons

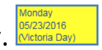
Button	Purpose
Show All	This button expands the Timesheet showing all possible data entry fields. Caution should be used if selecting this option. This option may take some time depending upon the size of the template.

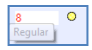
Hide All	This button contracts the Timesheet back to its normal layout.

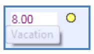
Colour Indicators

The Timesheets will display the value of "Hours" in different colours based upon certain conditions. Below describes those conditions.

Pink - When an **Attendance Code** appears in pink the system requires you to put a comment in when hours are recorded. 

Yellow - When a **Date** appears in Yellow it denotes a Statutory Holiday. 

Red - Hours in the Timesheet will show in red when the system is set to use default hours per day. These hours can be changed if necessary. 

Purple - Hours will show in purple for an approved Time Request in ESS. These hours cannot be changed. 

Login Types

Supervisors and Employees will log in using their User Name and Password. Depending on security settings, buttons on the Login screen may or may not be accessible.

Typically all employees will log in to either Timesheets or Timesheet Submission (with or without Equipment Costs).

Supervisors will log in to Timesheet Approval when approving their employees' Timesheets.

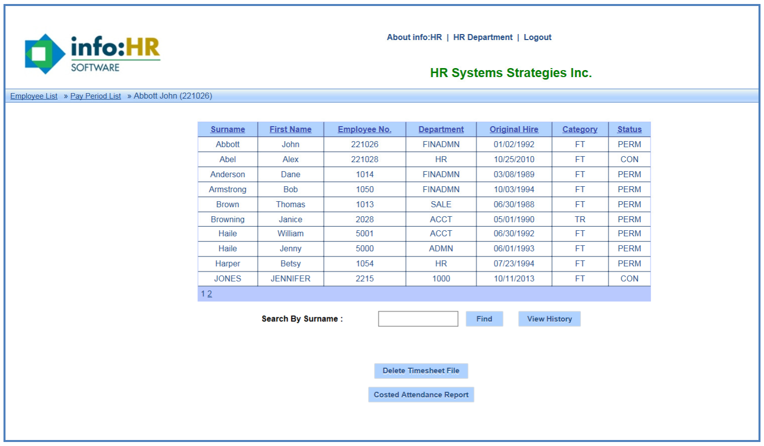
To login:

- Select the option from the menu above.
- Enter your User Name and Password.
- Click on **Login** to continue or **Reset** to restart.

The page checks the info:HR Security Master. If a security record is found for the User Name entered and the assigned password matches what was entered, the next page will appear.

Supervisor Login

When supervisors log in to the system they will see an alphabetical list of all of their employees. To search for an employee you can use the **Search by Surname** and type in the last name, or part of it. Then click **Find**. The employee list can be sorted by any of the headings by simply clicking on them. Once sorted on any of the first four columns, you can search within that column by using the Search field.



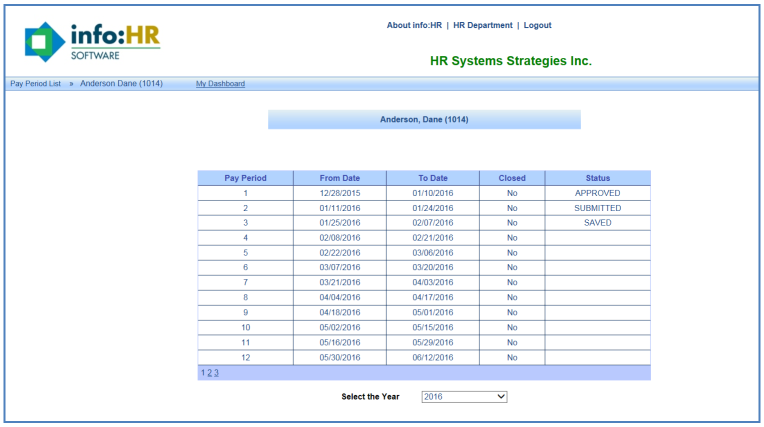
Buttons

Button	Purpose
Find	Finds the first employee matching the search string entered.
View History	Displays the View History page showing a summarized list of Timesheets by employee/pay period.
Delete Timesheet File	If used, will delete ALL Timesheets. Extreme caution is advised if you are going to use the button.
Costed Attendance Report	Produces a Costed Attendance report for employees.

Employee Login

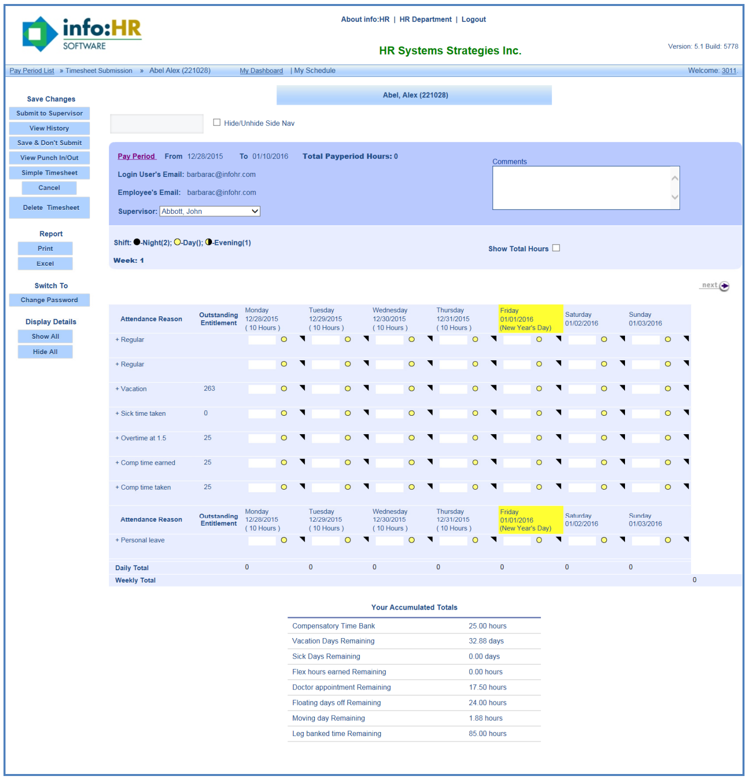
When employees log in, the first screen they see is the Pay Period list. From here they are able to view the status of all of their timesheets.

To enter data into a timesheet, click on the appropriate **Pay Period.**



Timesheet

By using this option, employees are entering their timesheet information directly into info:HR's Attendance Master, bypassing any approval process.



The Timesheet displays all outstanding entitlements, in hours, for each bank in the column beside the Attendance Reason. The bottom of the Timesheet displays the entitlement balances in days.

Employees enter their hours that correspond to the appropriate Attendance Reason on the appropriate day. If an employee needs to include a comment for one Attendance Reason on a specific day, click on the **black triangle**  to open up the display box. Clicking the triangle box again will close the expansion.

A maximum of 7 days can be displayed on one page. To go to the next up to 7 days, click on 

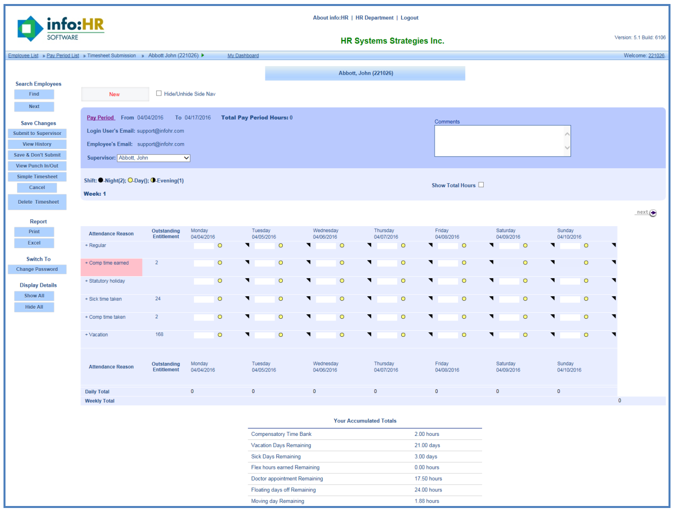
that is located above the last day of the week displayed. Clicking on 

goes back one week.

Button	Purpose
Find	Returns the user to the Employee List.
Previous	Displays the previous employee alphabetically.
Next	Displays the next employee alphabetically.
Save	Updates the attendance Master file with the information entered on the screen. No supervisor approval is required.
Cancel	Returns the user to the last saved point. This works like a refresh. Cancel will delete all records entered. If the timesheet has been previously saved, it will not

	delete saved data.
Print	Allows the user to print the Timesheet.
Excel	Exports the Timesheet to Excel.
Change Password	Allows the user to change their password.
Show All	Expands all fields on the Timesheet to allow the user to view Charge Code and Comments fields.
Hide All	Closes all fields on the Timesheet, hiding Charge Code and Comments fields.

Timesheets Submission



The Timesheet displays all outstanding entitlements, in hours, for each bank in the column beside the Attendance Reason. The bottom of the Timesheet displays the entitlement balances in days.

Employees enter their hours that correspond to the appropriate Attendance Reason on the appropriate day. If an employee needs to include a comment for one Attendance Reason on a specific day, click on the **black triangle** to open up the display box. Clicking the triangle box again will close the expansion.

A maximum of 7 days can be displayed on one page. To go to the next up to 7 days, click on next that is located above the last day of the week displayed. Clicking on previous goes back one week.

Button	Purpose
Submit to Supervisor	Once the Timesheet is complete for the entire pay period, click this button to send it to the supervisor for approval.
View History	Displays the View History page showing a summarized list of Timesheets by employee/pay period.
Save and Don't Submit	Allows the employee to save their data without submitting to their supervisor.
View Punch In/Out	Displays the Punch In/Out screen.
Simple Timesheet	Displays the Simple Timesheet screen..
Cancel	Works like a refresh; this will take you back to the last saved point. Only data entered during this session will be erased. Data entered and save previously will still show on the Timesheet
Delete Timesheet	Delete Timesheet provides the ability to delete a Timesheet after it has been submitted to a supervisor as long as it is NOT approved.
Comments	In the top right corner is for communication between employee and supervisor that is not related to a specific day or attendance code. If an employee needs to include a comment for one attendance code on a specific day, they click on the **black triangle** to open up the display box.

Timesheets Submission Equipment Costs

Timesheets Equipment Costs functions are identical to Timesheet Submission with the exception of including a Machine Number, Machine Rate and Machine Hours. When using Timesheets with Equipment Costs you will not be able to save a Timesheet without entering this information against the hours recorded.

Button	Purpose
Submit to Supervisor	Once the Timesheet is complete for the entire pay period, click this button to send the Time sheet to the supervisor for approval.
View History	Displays the View History page showing a summarized list of Timesheets by employee/pay period.
Save and Don't Submit	Allows the employee to save their data without submitting to their supervisor.
Cancel	Works like a refresh; this will take you back to the last saved point. Only data entered during this session will be erased. Data entered and save previously will still show on the Timesheet.
Delete Timesheet	Delete Timesheet provides the ability to delete a Timesheet after it has been submitted to a supervisor as long as it is NOT approved.
Comments	In the top right corner is for communication between employee and supervisor that is not related to a specific day or attendance code. If an employee needs to include a comment for one attendance code on a specific day, they click on the **black triangle** to open up the display box.

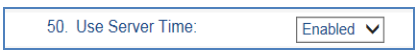
Punch In/Out

Punch In/Out functions like a time clock. Employees will be required to *Punch In* at the beginning of their day and *Punch Out* at the end of their day. The system allows the administrator to limit the number of punches per day so that multiple punches in or out may be recorded; for example, you may require that your employees Punch In and Out for their lunch break, you would set the maximum punches per day at 4. When an employee records a punch, the time is directly written into the Comment field of the Timesheet. Once the entry is made in the Timesheet, it cannot be adjusted except by an administrator or HR.

To enable Punch In/Out

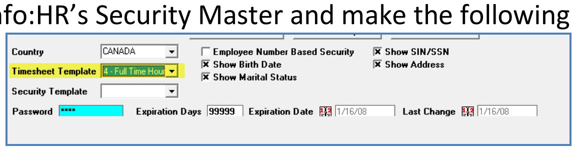
Open the Application Settings and ensure the following functions are Enabled.

Timesheet Template Auto Selection must be enabled to use the Punch in/out to ensure records are not recorded to the wrong Template.

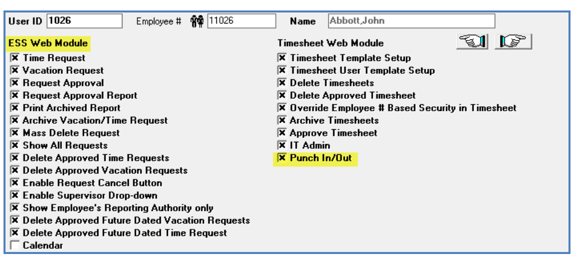


Use Server Time enables the punches to capture the time on the server. If this is not enabled the punches will capture the time on the computer being used to Punch In/Out.

Open info:HR's Security Master and make the following changes.



Security Master Basic 1 - Timesheet Template must be assigned to the employee. Please see the Building a Template and Assigning a Template sections of this document for further instructions.

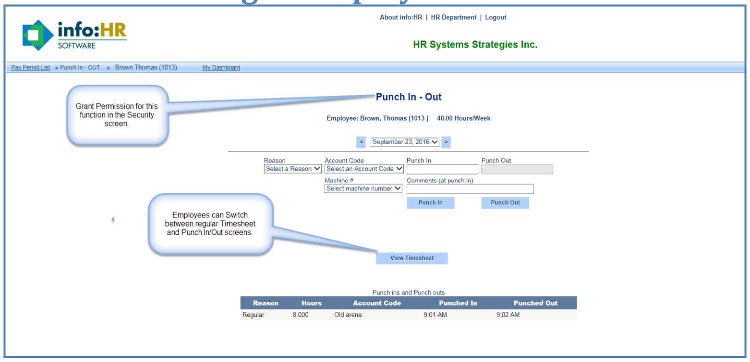


Security Master - ESS & Timesheet Web Modules Punch In/Out must be checked.

Once the above settings are complete Punch In/Out is ready to use.

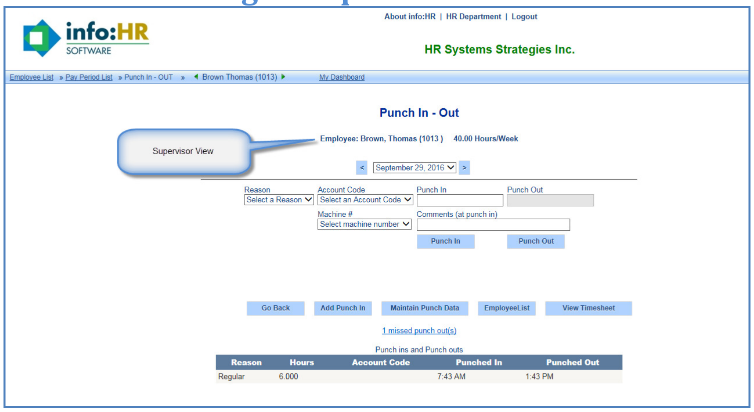
Entering Punches

Punch In-Out Page – Employee View



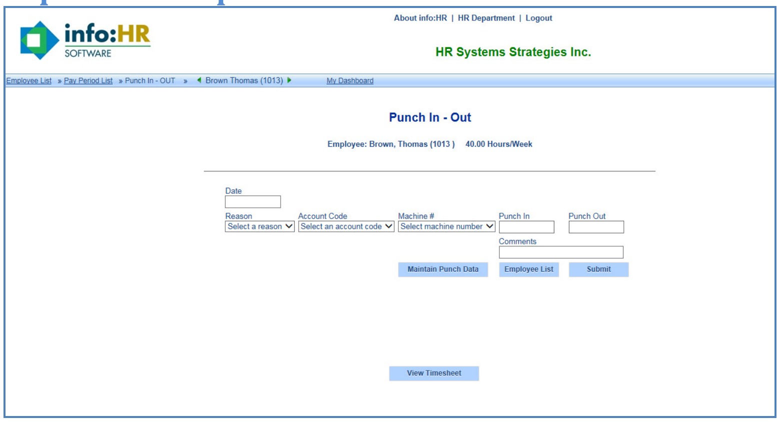
- The employee can only punch in or out for the current day. If they miss either the punch in or out, the supervisor will need to perform the function on their behalf.
- Select a **Reason**. Only Reasons identified in the Template as usable for Punch In/Out will appear.
- If they want to "charge" their hours to a particular Account, select the Account. Account Masters are created in info:HR under Setup / Account Master.
- Click on **Punch In**.
- Once punched in, the **Punch Out** button is visible. To punch out, the employee clicks on the **Punch Out** button. This generates a record in the Timesheet.
- If the Application Setting for using the server time is disabled, punches will record the date/time as set up on the employee's computer. This is important since your employees may not be in the same time zone as the servers and you want an accurate time based on their local time zone.
- The employee can punch in/out as many times in a day as they wish provided your Timesheet Template has the Repeat option set properly.
- At any time, the employee can view the Timesheet by clicking **View Timesheets**. They will use the Timesheet module for reasons other than Punch In/Out. The Punch In/Out results will appear in RED in the Timesheet and cannot be changed.
- The employee can scroll forward or back from the current day but cannot enter any punch data for those days. Scrolling back shows the employee previous days' punch data.

Punch In-Out Page – Supervisor's View

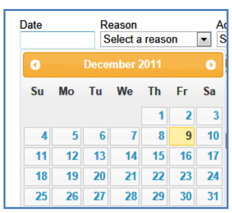


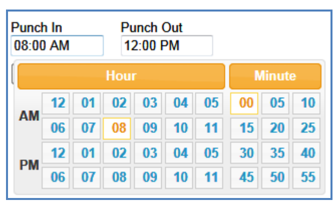
- The Supervisor can also Punch In or Out for themselves.
- This page gives them the capability to:
  - Add missing punches, e.g. for an employee who forgot to punch in/out one day
  - Select to view multiple employees
  - View/edit their Timesheet

Supervisor's Option - Add Punch Data



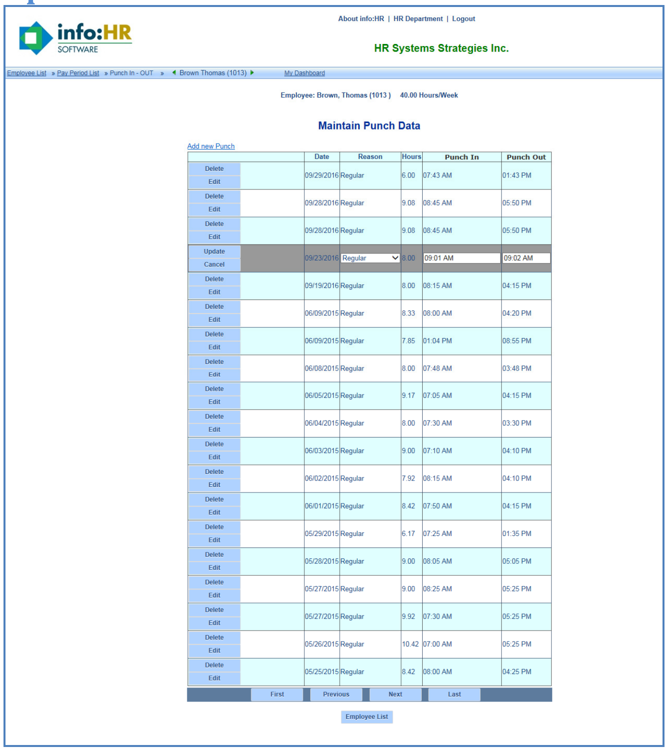
- From the previous page, the supervisor located the employee in question and clicked on **Add Punch In**.
- The supervisor single clicks the **Date** box and a dialog box appears. Select the missing date.
- Next, select a **Reason** and/or **Account Code** from the drop down box.
- Next, single click on **Punch In** and a dialog box appears. Select the Hour and Minute.
- Repeat above for the **Punch Out**.
- Dialog boxes are shown like:





- Click on **Submit** to add the punch data to the employee's Timesheet.
- Repeat the Add Punch Data for any missing full day punches. This function isn't used if someone forgot to Punch Out. The Maintain Punch Data button is used for this purpose. Supervisor's

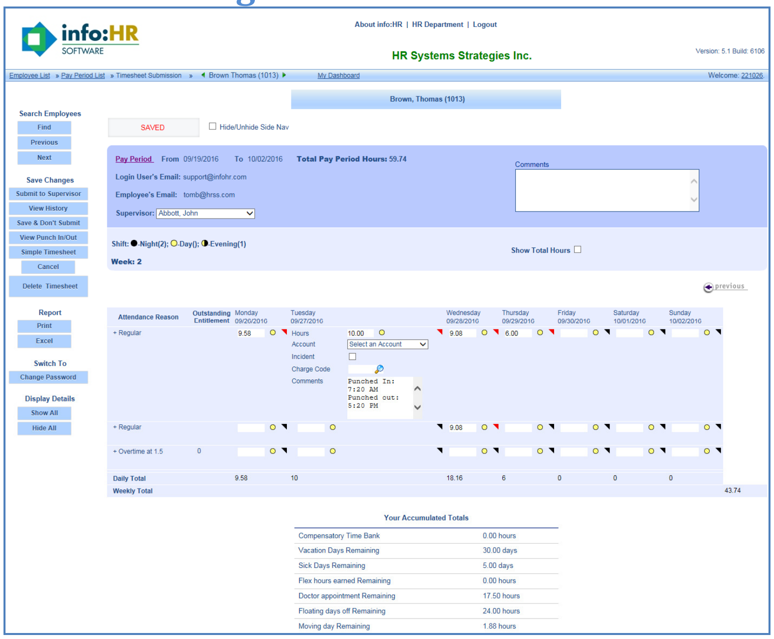
Option - Maintain Punch Data



- This function appears whenever the Supervisor clicks on **Maintain Punch Data** from either the Punch In/Out or Add Punch Data pages.
- This page allows the supervisor to either:
  - Delete an entire punch
  - Edit the Punch In/Out date and time
  - Punch in or out missing punches
- If **Edit** is clicked:

  - Supervisor can change the Reason and Punch In/Out times. The Hours are system calculated based on the punch times.
  - Click on **Update** to save the changes.
- If **Delete** is clicked, the application asks you to confirm the delete.
- From this page, you can also go back to the **Add New Punch** or **Employee List** to select another employee.

Timesheet Page



- For better navigation a button is added to timesheet submission only to be able to switch between Timesheet and Punch In/Out pages.
- The actual punches in/out times are kept under Comments. To view the comments, click on the red triangle.

Timesheet Approval

Supervisors will log in to this section in order to approve their employees' Timesheets. Once a supervisor has logged into the system, Timesheets can be viewed based on selection criteria shown at the top of the screen. By default, the page shows the current year and the current pay period. The selection criteria used to view records outside of the default settings. Once new criteria are entered, click **Go** and the records will display pertaining to the search criteria. Clicking **Reset** clears the selection criteria.

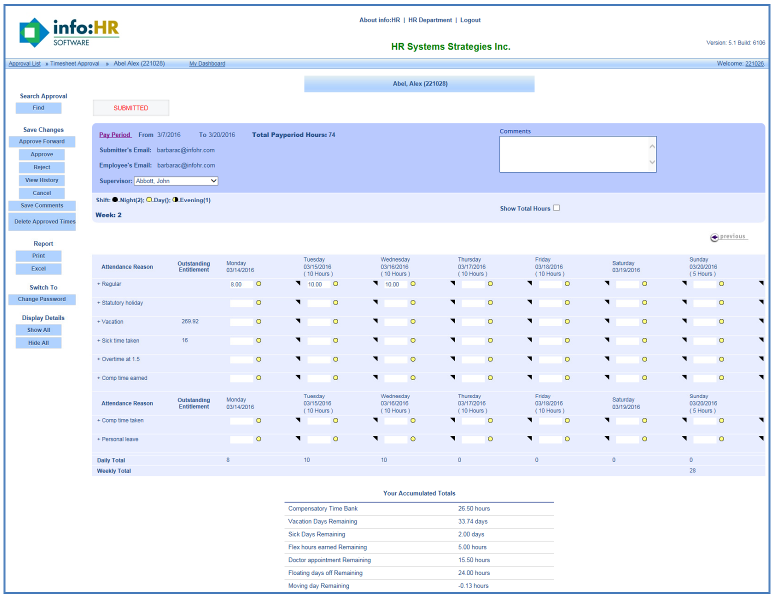
Radio Dials	Purpose
From/To	Allows supervisors to enter a specific date range to be viewed.
Year	Allows supervisors to select a year. Then a pay period must be selected.
Show Current User	Will show users that submitted Timesheets to the logged in supervisor.
Show All Users	Will show all Timesheets awaiting approval that were submitted by all employees.

Check Boxes

One or more boxes may be checked at one time.

Check Boxes	Purpose
Submitted	Will show all Timesheets with a Submitted status.
APP/FWD	Will show all Timesheets with an Approved Forward status. Approved Forward Timesheets require more than one supervisor approval.
Approved	Will show Timesheets with an Approved status.
Rejected	Will show Timesheets with a Rejected status.
Resubmitted	Will show Timesheets with a Resubmitted status.

If a payroll interface is used that transfers timesheet data to payroll, it is recommended that an administrator open this page at the end of the pay period to check for unapproved Timesheets. The Submitted, APP/FWD, Rejected and Resubmitted check boxes should be checked for that pay period. Any Timesheets showing will need to be approved before the Payroll/Finance department can begin processing the payroll.



All hours entered in are greyed out as they cannot be changed. A **red triangle** indicates that that attendance code has a comment attached to it. Click on the triangle to view the comments and again on the triangle to close the expansion.

Supervisors have the option to Approve, Reject, or Approve Forward to another supervisor. The Approved Forward option is controlled via Application Settings and is hidden if the setting is not turn on.

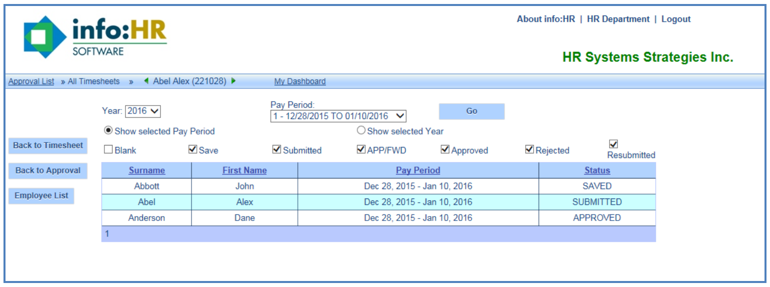
Comments can be entered into the Comment box in the top right corner of the page. These are general comments relating to the Timesheet. Once the Timesheet has been approved, these comments are only viewable via the Timesheet module and not through info:HR. Comments can be used to notify the employee why a Timesheet was rejected.

Once an action is taken by the supervisor, the Approval List is displayed again.

Button	Purpose
Approve Forward	Approves the Timesheet and forwards the Timesheet to another supervisor or manager for approval. Unlimited numbers of forwards are allowed. An email is sent to the next supervisor or manager.
Approve	Approves the Timesheet with no other actions required. The info:HR Attendance Master is updated.
Reject	Rejects the Timesheet and sends a message to the employee to resubmit.
View History	Will display the Timesheet history screen.
Cancel	This works like a reset, it will return the user to the last saved point.
Save Comments	Saves the comments that were entered into the top right hand corner of the Timesheet.
Delete Approved Timesheet	Deletes an approved Timesheet. The info:HR Attendance Master records are also deleted. This item is controlled via the info:HR’s Security Master.

View History

This function allows users to view Timesheets by employee based upon the selection criteria entered.



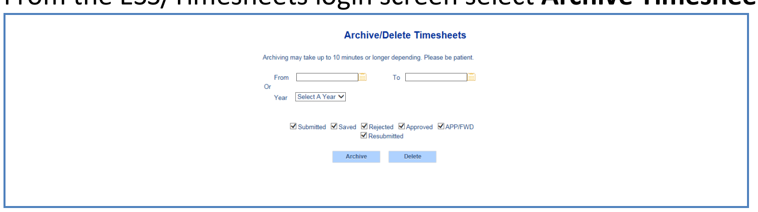
- This example shows all employees alphabetically for Pay Period 1 in 2015. All statuses with the exception of Blank were selected.
- Click on the Timesheet line to view the Timesheet details.

Archive/Delete Timesheets

This is only completed once the year end has been done. Once archived, the employees do not have access to view their Timesheets anymore. Approved Timesheet information appears in the Attendance or Attendance History tables.

Access to this menu item is controlled via info:HR's Security Master. Caution is advised if using this function.

From the ESS/Timesheets login screen select **Archive Timesheets**



- Enter either a "From / To" date or select the "Year" from the drop down list. The Year refers to a calendar year (January through December) and not a fiscal year.
- To archive Timesheets, click on Archive. This moves the Timesheets that match the selection to an archived file. **There is no 'undo' for this function without having to deal with the info:HR Support Department.**
- To delete Timesheets, click on Delete. This option should only be used if you are cleaning up your database after your initial timesheet training and testing. Once the system is live, it is not recommended to use the Delete button. **There is no 'undo' for this function.**
- Once archived, the page returns with the number of records archived.