

## Table of Contents

Getting Started .....	2
Human Resource Functions .....	2
Pay Period Setup .....	2
Creating Timesheet Templates .....	3
Building a Template .....	4
Attaching a Template to an Employee.....	5
Initial Login Screen .....	6
Side Bar Menu Item Buttons .....	7
Colour Indicators.....	8
Login Types.....	9
Supervisor Login .....	10
Employee Login.....	11
Timesheet.....	12
Timesheets Submission.....	14
Timesheets Submission Equipment Costs.....	15
Punch In/Out .....	16
To enable Punch In/Out .....	16
Entering Punches.....	17
Punch In-Out Page – Employee View .....	17
Punch In-Out Page – Supervisor’s View .....	18
Supervisor’s Option - Add Punch Data.....	19
Option - Maintain Punch Data.....	20
Timesheet Page .....	21
Timesheet Approval .....	22
View History.....	24
Archive/Delete Timesheets.....	24

## Getting Started

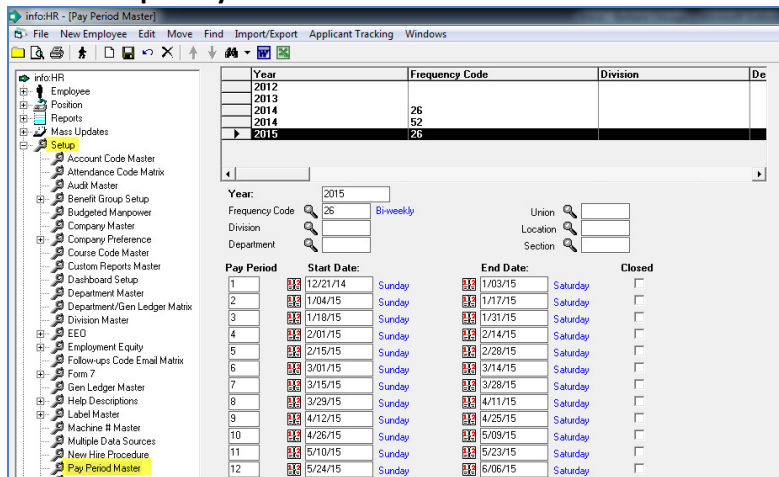
### Human Resource Functions

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.

# Timesheet User Manual 5.1

## 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

The screenshot shows the login interface for HR Systems Strategies Inc. The page header includes the 'info:HR SOFTWARE' logo, 'About info:HR | HR Department', and a language dropdown set to 'English'. The main header displays 'HR Systems Strategies Inc.' and 'Version: 5.1 Build: 5778'. A navigation menu on the left lists various HR functions, with 'Attendance Data Entry' expanded to show options like 'Timesheet Submission' and 'Edit Timesheet Templates'. The login form includes fields for 'User Name', 'Password', and a 'Template' dropdown menu. A callout box points to the 'Edit Templates' option in the dropdown, stating: 'Edit Templates allows you to enter the Timesheet Template Setup'. Below the form are 'Login' and 'Reset' buttons. The footer indicates 'Timesheets Version 5.1 Dated 10/27/2015 © 2015 HR Systems Strategies Inc.'

### Radio Button

This screenshot shows the same login interface as above, but with the 'Edit Timesheet Templates' radio button selected in the navigation menu. A callout box points to this radio button, stating: 'Edit Templates allows you to enter the Timesheet Template Setup'. The 'Employee Self Service Systems' menu is visible on the right, listing options like 'Employee Basic Information' and 'Work History/Compensation'. The 'Login' and 'Reset' buttons remain at the bottom of the form.

# Timesheet User Manual 5.1

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

# Timesheet User Manual 5.1

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

# Timesheet User Manual 5.1

## Initial Login Screen

Menu Selection	Purpose
<b>Timesheet</b>	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.
<b>Timesheet Submission</b>	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.
<b>Timesheet Submission Equipment Costs</b>	Identical to Timesheets Submission, with the added feature of the ability to record hours associated to a specific machine and attach a cost.
<b>Previous Pay Period Adjustments</b>	This option is not available at this time.
<b>Punch In/Out</b>	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.
<b>Timesheet Approval</b>	This section is to be used by supervisors and managers to approve submitted Timesheets.
<b>View History</b>	Employees and supervisors have the ability to view Timesheet History.
<b>Archive/Delete Timesheets</b>	This section should only be used by HR to Archive Timesheets. <b>Note:</b> Timesheets cannot be recovered from Archive at this time.
<b>Application Settings</b>	This section holds all the settings for Timesheets. To be used by IT and HR Only.

# Timesheet User Manual 5.1

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

### Save Changes

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

### Report Buttons

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

### Switch To Button

Button	Purpose
<b>Change Password</b>	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
<b>Show All</b>	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.

# Timesheet User Manual 5.1

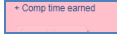
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## Hide All


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. 



# Timesheet User Manual 5.1

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## 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.

The screenshot shows the login interface for info:HR. On the left, a navigation menu lists various HR functions, with 'Attendance Data Entry' expanded to show options like 'Timesheet Submission' and 'Timesheet Submission Without Equipment Costs'. The main content area displays the company logo and the specific system being accessed. The login form at the bottom includes fields for 'User Name' and 'Password', along with 'Login' and 'Reset' buttons.

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.

# Timesheet User Manual 5.1

## 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.

The screenshot shows the 'info:HR SOFTWARE' interface. At the top, it says 'About info:HR | HR Department | Logout' and 'HR Systems Strategies Inc.'. Below this is a breadcrumb trail: 'Employee List > Pay Period List > Abbott, John (221026)'. The main content is a table with the following data:

Surname	First Name	Employee No.	Department	Original Hire	Category	Status
Abbott	John	221026	FINADMN	01/02/1992	FT	PERM
Abel	Alex	221028	HR	10/25/2010	FT	CON
Anderson	Dane	1014	FINADMN	03/06/1989	FT	PERM
Armstrong	Bob	1050	FINADMN	10/03/1994	FT	PERM
Brown	Thomas	1013	SALE	06/30/1988	FT	PERM
Browning	Janice	2026	ACCT	05/01/1990	TR	PERM
Haile	William	5001	ACCT	06/30/1992	FT	PERM
Haile	Jenny	5000	ADMIN	06/01/1993	FT	PERM
Harper	Betsy	1054	HR	07/23/1994	FT	PERM
JONES	JENNIFER	2215	1000	10/11/2013	FT	CON

Below the table, there is a search section: '1.2 Search By Surname :  Find View History'. At the bottom, there are two buttons: 'Delete Timesheet File' and 'Costed Attendance Report'.

## Buttons

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

# Timesheet User Manual 5.1

## 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**.

info:HR SOFTWARE  
About info:HR | HR Department | Logout  
HR Systems Strategies Inc.

Pay Period List > Anderson, Dane (1014) My Dashboard

Anderson, Dane (1014)

Pay Period	From Date	To Date	Closed	Status
1	12/29/2015	01/10/2016	No	APPROVED
2	01/11/2016	01/24/2016	No	SUBMITTED
3	01/25/2016	02/07/2016	No	SAVED
4	02/08/2016	02/21/2016	No	
5	02/22/2016	03/06/2016	No	
6	03/07/2016	03/20/2016	No	
7	03/21/2016	04/03/2016	No	
8	04/04/2016	04/17/2016	No	
9	04/18/2016	05/01/2016	No	
10	05/02/2016	05/15/2016	No	
11	05/16/2016	05/29/2016	No	
12	05/30/2016	06/12/2016	No	

1 2 3


Select the Year: 2016



# Timesheet User Manual 5.1

## 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.

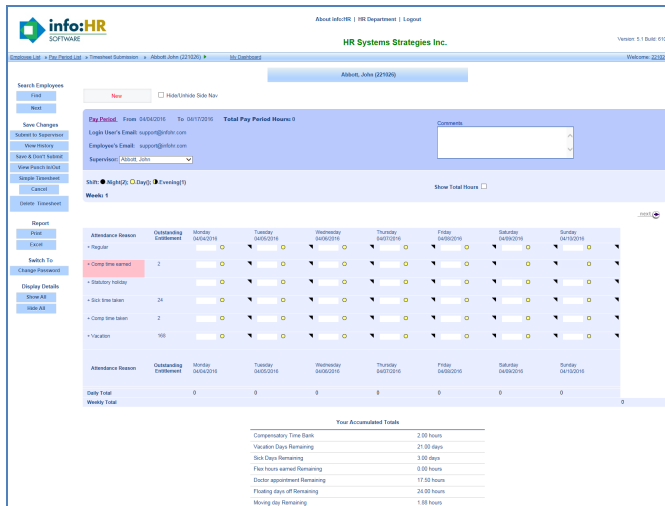
Button	Purpose
<b>Find</b>	Returns the user to the Employee List.
<b>Previous</b>	Displays the previous employee alphabetically.
<b>Next</b>	Displays the next employee alphabetically.
<b>Save</b>	Updates the attendance Master file with the information entered on the screen. No supervisor approval is required.
<b>Cancel</b>	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

## Timesheet User Manual 5.1


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

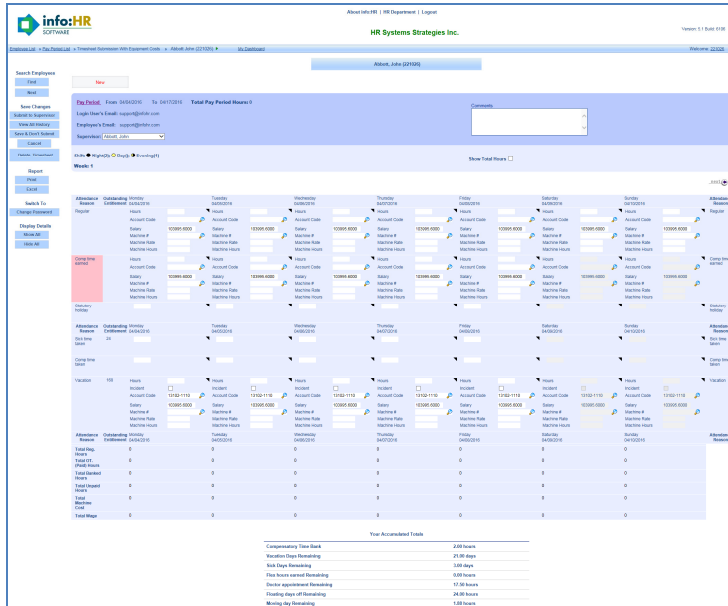
Employees enter their hours that correspond to the appropriate Attendance Reason on the appropriate day. If an employee needs to include a comment for one Attendance Reason on a specific day, click on the **black triangle**  to open up the display box. Clicking the triangle box again will close the expansion.

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

Button	Purpose
<b>Submit to Supervisor</b>	Once the Timesheet is complete for the entire pay period, click this button to send it to the supervisor for approval.
<b>View History</b>	Displays the View History page showing a summarized list of Timesheets by employee/pay period.
<b>Save and Don't Submit</b>	Allows the employee to save their data without submitting to their supervisor.
<b>View Punch In/Out</b>	Displays the Punch In/Out screen.
<b>Simple Timesheet</b>	Displays the Simple Timesheet screen..
<b>Cancel</b>	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
<b>Delete Timesheet</b>	Delete Timesheet provides the ability to delete a Timesheet after it has been submitted to a supervisor as long as it is NOT approved.
<b>Comments</b>	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 <b>black triangle</b> to open up the display box.

# Timesheet User Manual 5.1

## 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
<b>Submit to Supervisor</b>	Once the Timesheet is complete for the entire pay period, click this button to send the Time sheet to the supervisor for approval.
<b>View History</b>	Displays the View History page showing a summarized list of Timesheets by employee/pay period.
<b>Save and Don't Submit</b>	Allows the employee to save their data without submitting to their supervisor.
<b>Cancel</b>	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.
<b>Delete Timesheet</b>	Delete Timesheet provides the ability to delete a Timesheet after it has been submitted to a supervisor as long as it is NOT approved.
<b>Comments</b>	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 <b>black triangle</b> to open up the display box.

# Timesheet User Manual 5.1

## 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.

48. Timesheet Template Auto Selection:  ▼

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

50. Use Server Time:  ▼

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.

Country: CANADA  
Timesheet Template: 4: Full Time Hour  
Security Template: [dropdown]  
Employee Number Based Security:   
Show Birth Date:   
Show Marital Status:   
Show SIN/SSN:   
Show Address:   
Expiration Days: 99999 | Expiration Date: 1/16/08 | Last Change: 1/16/08

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.

User ID: 11026 | Employee #: 111005 | Name: Abbott, John  
ESS Web Module:  Time Request  
 Vacation Request  
 Request Approval  
 Request Approval Report  
 Print Archived Report  
 Archive Vacation/Time Request  
 Mass Delete Request  
 Show All Requests  
 Delete Approved Time Requests  
 Delete Approved Vacation Requests  
 Enable Request Cancel Button  
 Enable Supervisor Drop-down  
 Show Employee's Reporting Authority only  
 Delete Approved Future Dated Vacation Requests  
 Delete Approved Future Dated Time Request  
 Calendar  
Timesheet Web Module:  Timesheet Template Setup  
 Timesheet User Template Setup  
 Delete Timesheets  
 Delete Approved Timesheet  
 Override Employee # Based Security in Timesheet  
 Archive Timesheets  
 Approve Timesheet  
 IT Admin  
 Punch In/Out

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

Grant Permission for this function in the Security screen.

Employees can Switch between regular Timesheet and Punch In/Out screens.

Reason	Hours	Account Code	Punched In	Punched Out
Regular	8.000	Old area	9:01 AM	9:02 AM

- 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

Supervisor View

Employee: Brown, Thomas (1013) 40.00 Hours/Week

September 29, 2016

Reason: Select a Reason  
Account Code: Select an Account Code  
Machine #: Select machine number  
Punch In: [Text Field]  
Punch Out: [Text Field]  
Comments (at punch in): [Text Field]

Punch In Punch Out

Go Back Add Punch In Maintain Punch Data Employee List View Timesheet

1 missed punch out(s)

Punch ins and Punch outs

Reason	Hours	Account Code	Punched In	Punched Out
Regular	6.000		7:43 AM	1:43 PM

- 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

# Timesheet User Manual 5.1

## Supervisor's Option - Add Punch Data

The screenshot shows the 'Punch In - Out' form for employee Brown, Thomas (1013). The form includes fields for Date, Reason (with a dropdown menu), Account Code (with a dropdown menu), Machine # (with a dropdown menu), Punch In, and Punch Out. There is also a Comments field and buttons for 'Maintain Punch Data', 'Employee List', and 'Submit'. A 'View Timesheet' button is located at the bottom of the form.

- 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:

The screenshot shows a date selection dialog box for December 2011. The calendar grid shows the days of the month, with the 9th of December highlighted in yellow.

The screenshot shows a time selection dialog box. It has fields for 'Punch In' (08:00 AM) and 'Punch Out' (12:00 PM). Below these are two grids for selecting the hour and minute. The 'Hour' grid has columns for AM and PM, and rows for hours 12 through 11. The 'Minute' grid has columns for minutes 00 through 55. The 00 minute slot is highlighted in yellow.

- 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

Employee: Brown, Thomas (1013) | 40.00 Hours/Week

**Maintain Punch Data**

Add new Punch		Date	Reason	Hours	Punch In	Punch Out
Delete	Edit	09/29/2016	Regular	8.00	07:43 AM	01:43 PM
Delete	Edit	09/29/2016	Regular	9.08	08:45 AM	05:50 PM
Delete	Edit	09/29/2016	Regular	9.08	08:45 AM	05:50 PM
Update	Cancel	09/23/2016	Regular	0.00	09:01 AM	09:02 AM
Delete	Edit	09/19/2016	Regular	8.00	08:15 AM	04:15 PM
Delete	Edit	06/09/2015	Regular	8.33	08:00 AM	04:20 PM
Delete	Edit	06/09/2015	Regular	7.85	01:04 PM	08:55 PM
Delete	Edit	06/09/2015	Regular	8.00	07:48 AM	03:48 PM
Delete	Edit	06/05/2015	Regular	9.17	07:05 AM	04:15 PM
Delete	Edit	06/04/2015	Regular	8.00	07:30 AM	03:30 PM
Delete	Edit	06/03/2015	Regular	9.00	07:10 AM	04:10 PM
Delete	Edit	06/02/2015	Regular	7.92	08:15 AM	04:10 PM
Delete	Edit	06/01/2015	Regular	8.42	07:50 AM	04:15 PM
Delete	Edit	05/29/2015	Regular	8.17	07:25 AM	01:35 PM
Delete	Edit	05/29/2015	Regular	9.00	08:05 AM	05:05 PM
Delete	Edit	05/27/2015	Regular	9.00	08:25 AM	05:25 PM
Delete	Edit	05/27/2015	Regular	9.92	07:30 AM	05:25 PM
Delete	Edit	05/26/2015	Regular	10.42	07:00 AM	05:25 PM
Delete	Edit	05/25/2015	Regular	8.42	08:00 AM	04:25 PM

Buttons: First, Previous, Next, Last

Employee List

- 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:

	Date	Reason	Hours	Punch In	Punch Out
Update	06/09/2015	Regular	0.00	01:04 PM	
Cancel					

- 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 User Manual 5.1

## Timesheet Page

The screenshot shows the 'Timesheet Page' for employee Brown, Thomas (1013). The page header includes 'info:HR SOFTWARE' and 'HR Systems Strategies Inc.'. The main content area displays the following information:

- Employee:** Brown, Thomas (1013)
- Pay Period:** From 09/19/2016 To 10/02/2016. Total Pay Period Hours: 59.74.
- Shift:** Night(2), Day(1), Evening(1)
- Week:** Week 2

The main form area contains a calendar grid for the week of 09/19/2016 to 10/02/2016. The grid shows attendance reasons and hours for each day. A dropdown menu is open for the Tuesday entry (09/27/2016), showing options for Account, Incident, and Change Code. The 'Comments' field is visible, containing punch in/out times: 7:42 AM and 5:42 PM.

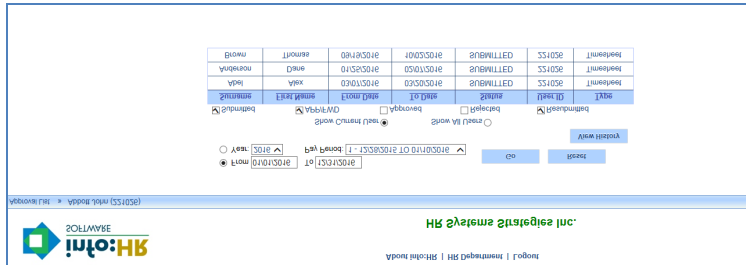
**Your Accumulated Totals**

Compensatory Time Bank	0.00 hours
Vacation Days Remaining	30.00 days
Sick Days Remaining	5.00 days
Flex hours earned Remaining	0.00 hours
Doctor appointment Remaining	17.50 hours
Floating days off Remaining	24.00 hours
Moving day Remaining	1.88 hours

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

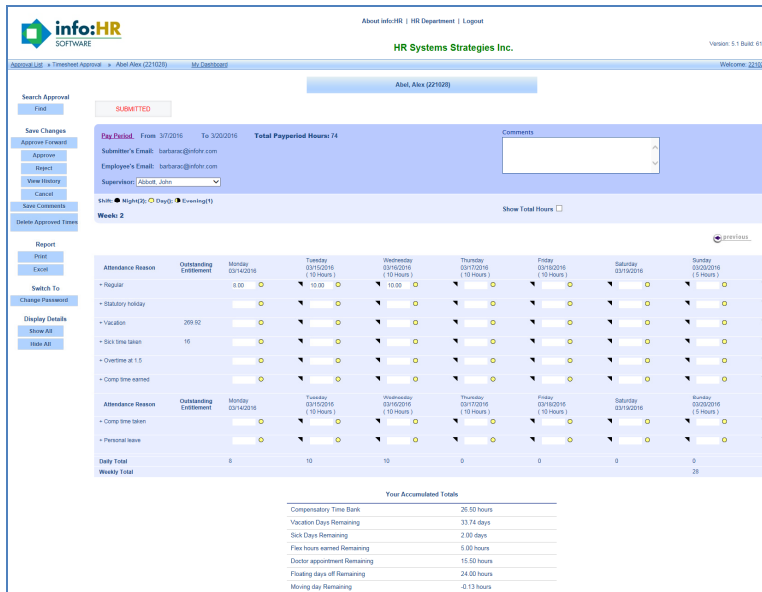
### Check Boxes

One or more boxes may be checked at one time.

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

# Timesheet User Manual 5.1



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
<b>Approve Forward</b>	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.
<b>Approve</b>	Approves the Timesheet with no other actions required. The info:HR Attendance Master is updated.
<b>Reject</b>	Rejects the Timesheet and sends a message to the employee to resubmit.
<b>View History</b>	Will display the Timesheet history screen.
<b>Cancel</b>	This works like a reset, it will return the user to the last saved point.
<b>Save Comments</b>	Saves the comments that were entered into the top right hand corner of the Timesheet.
<b>Delete Approved Timesheet</b>	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.

Surname	First Name	Pay Period	Status
Abbott	John	Dec 28, 2015 - Jan 10, 2016	SAVED
Abel	Alex	Dec 28, 2015 - Jan 10, 2016	SUBMITTED
Anderson	Dane	Dec 28, 2015 - Jan 10, 2016	APPROVED

- 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**

Archiving may take up to 10 minutes or longer depending. Please be patient.

From [ ] To [ ]

Or Year [Select A Year]

Submitted  Saved  Rejected  Approved  APPFWWD  Resubmitted

[Archive] [Delete]

- 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.