

## Simply Personnel - Time Sheets & Expenses

Simply Personnel

---

**Login**

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Change Password:

[Login](#) [Cancel](#)

[www.simplypersonnel.co.uk](http://www.simplypersonnel.co.uk)

---

Simply Personnel 12.8.0.1

---

Copyright © Croner Group Limited

-Training Workbook-



## **Introduction to Simply Personnel Timesheets & Expenses**

This document provides step-by-step guide for employee users to give an easy understanding on using the timesheets and expenses system within the self service module.

A user can update their Timesheet & Expense entries on a daily basis, adding notes and check any pending approvals which can be recalled and resubmitted.

## System Setup

Log on to Self Service with Administrator credentials to gain access to the System Setup.

This is where an Administrator can setup the Timesheet & Expenses defaults for Employees / Managers to select and submit for approval.

Select Account Setup Wizard to help populate the system with the relevant Client/Project/Task entries.

The system will be updated with the details specified in the wizard, or alternatively, access the following sections and click the Add button.

## Client List

## Project List

Simply Personnel ADMIN (LogOut)  
Virtual Clock

Home Outstanding Requests Timesheets & Expenses Time & Attendance **System Setup** Reports Appraisals

Personnel **Timesheets & Expenses** Time & Attendance Training General

Search

Client: All Name: Code: Status: All Search Clear

\*Delete option is NOT available when there are related records present (like tasks, timesheets, etc). It is recommended to instead mark them as **IN-ACTIVE** in such cases, if required.

Active	Billable	Client	Name	Code	Accounting Code	Created Date	Last Updated Date			
True	True	Croner	Implementation	IP	IP1	14 July 2016 12:06:21				
True	True	Croner	Training	TR	TR1	14 July 2016 12:05:51	28 November 2016 12:45:58			

Add New Project

Back to System Setup

## Task List

Simply Personnel ADMIN (LogOut)  
Virtual Clock

Home Outstanding Requests Timesheets & Expenses Time & Attendance **System Setup** Reports Appraisals

Personnel **Timesheets & Expenses** Time & Attendance Training General

Search

Name: Status: All Search Clear

\*Delete option is NOT available when there are related records present (like projects, timesheets, etc). It is recommended to instead mark them as **IN-ACTIVE** in such cases, if required.

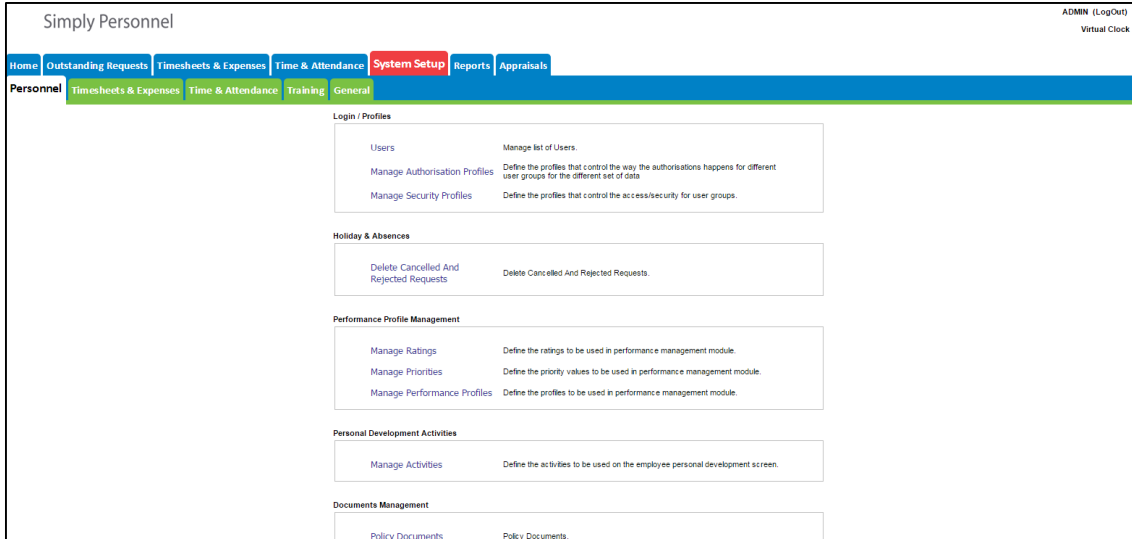
Active	Billable	Non Client/Task Specific	Name	Billing Rate	Accounting Code	Last Updated Date			
True	True	False	Demo	8.00	DM1				
True	True	False	Phone	8.00	PH1				
True	True	False	Support	8.00	SP1				

Add New Task

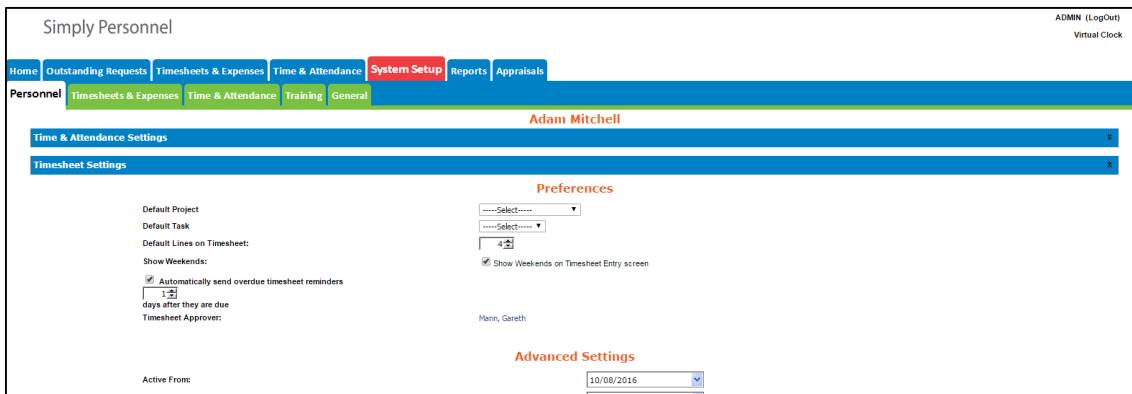
Back to System Setup

## Users System Setup

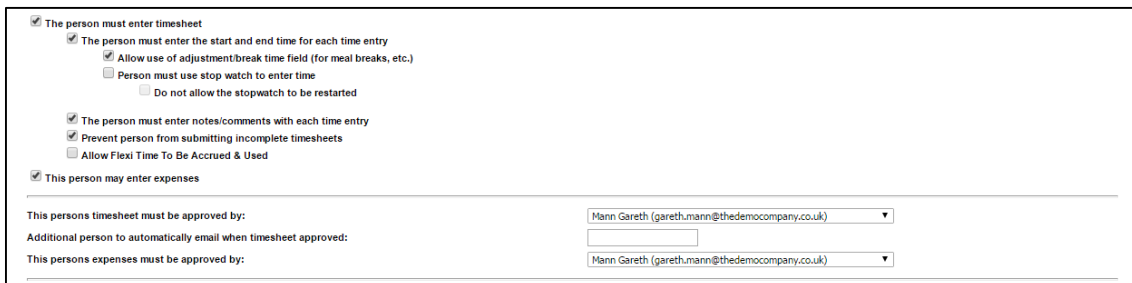
Navigate to System Setup – Personnel – Login/Profiles – Users



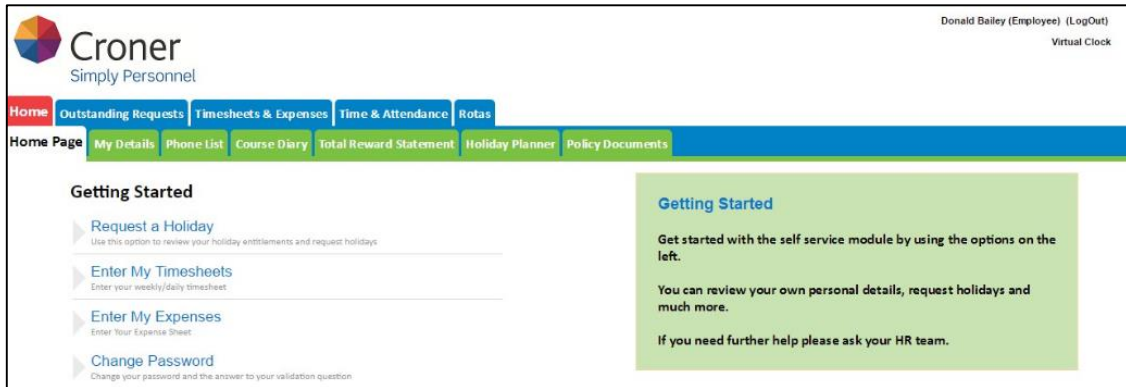
Each User within the system will need to be setup in order for the Employee / Manager to use the Timesheets & Expenses feature:



Scroll down and ensure the following has been setup (depending on if the Employee enters Timesheets etc.)



## Entering Timesheets and Expenses



The screenshot shows the Croner Simply Personnel dashboard. The user is Donald Bailey (Employee) and is logged out. The dashboard has a navigation bar with tabs: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, and Rotas. Below the navigation bar, there are sub-tabs: Home Page, My Details, Phone List, Course Diary, Total Reward Statement, Holiday Planner, and Policy Documents. The main content area is titled 'Getting Started' and contains several links: Request a Holiday, Enter My Timesheets, Enter My Expenses, and Change Password. A green callout box on the right provides instructions on how to get started with the self-service module.

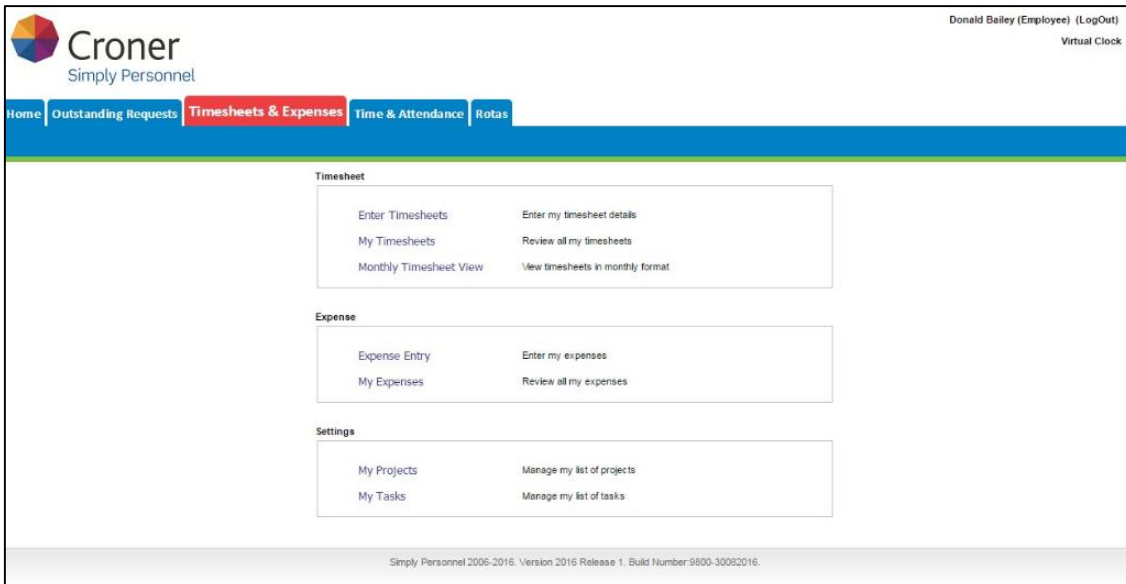
Anything that requires the user's attention will be displayed in the bottom right corner of the screen:



The notification box is titled 'Timesheets & Expenses' and contains four items:

- No Timesheet Entry for the current period. Please enter your timesheet
- You have not entered a timesheet for the periods: Week 28: Jul 11 - Jul 17, 2016, Week 29: Jul 18 - Jul 24, 2016, Week 30: Jul 25 - Jul 31, 2016, ... (more)
- Timesheets waiting for approval. Please click on My Departments Timesheets
- Expensesheets waiting for approval. Please click on My Departments Expenses

An Employee User can now enter their timesheet from this screen or alternatively select the tab Timesheets and Expenses:



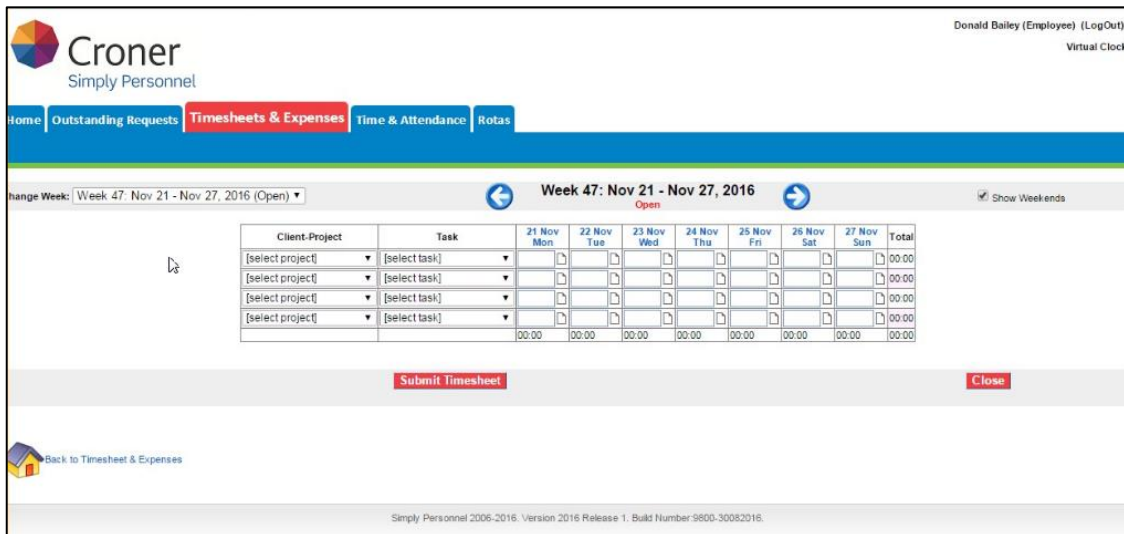
The screenshot shows the Croner Simply Personnel dashboard with the 'Timesheets & Expenses' tab selected. The dashboard is divided into three main sections: Timesheet, Expense, and Settings. The Timesheet section includes links for Enter Timesheets, My Timesheets, and Monthly Timesheet View. The Expense section includes links for Expense Entry and My Expenses. The Settings section includes links for My Projects and My Tasks. The user is Donald Bailey (Employee) and is logged out.

## Entering Timesheets

**Timesheet**

<a href="#">Enter Timesheets</a>	<a href="#">Enter my timesheet details</a>
<a href="#">My Timesheets</a>	<a href="#">Review all my timesheets</a>
<a href="#">Monthly Timesheet View</a>	<a href="#">View timesheets in monthly format</a>

This will open up a blank timesheet.



The screenshot shows the Croner Simply Personnel interface. The user is Donald Bailey (Employee) and is logged out. The navigation menu includes Home, Outstanding Requests, Timesheets & Expenses (selected), Time & Attendance, and Rotas. The current view is for Week 47: Nov 21 - Nov 27, 2016, which is marked as 'Open'. A 'Show Weekends' checkbox is checked. The main area contains a table for entering timesheet data.

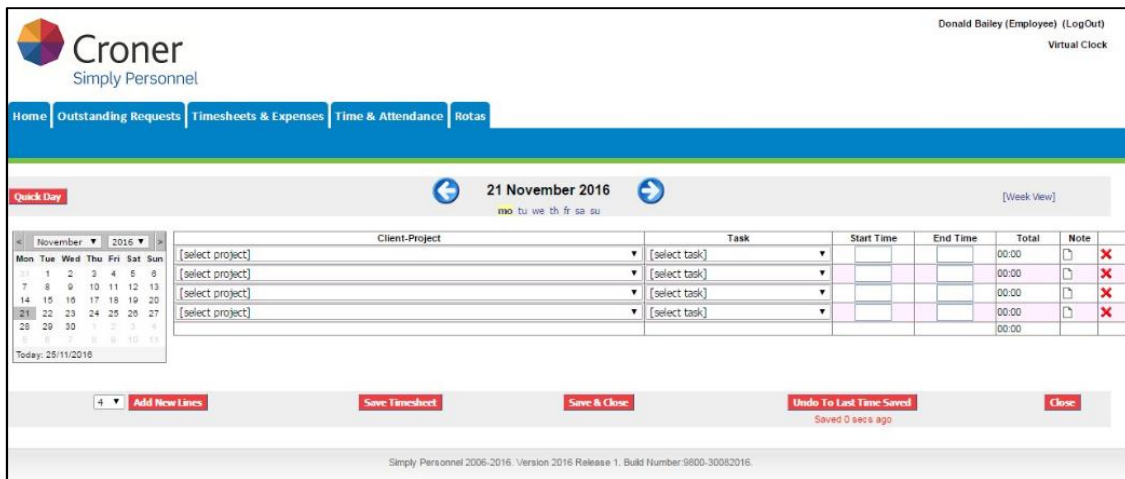
Client-Project	Task	21 Nov Mon	22 Nov Tue	23 Nov Wed	24 Nov Thu	25 Nov Fri	26 Nov Sat	27 Nov Sun	Total
[select project]	[select task]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
[select project]	[select task]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
[select project]	[select task]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
[select project]	[select task]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
		00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

At the bottom of the table, there are two buttons: **Submit Timesheet** and **Close**. A 'Back to Timesheet & Expenses' link is also visible at the bottom left.

The Timesheet will default to the current week, and an Employee User can then click on the day they wish to enter.

The system can also be setup where an entry can be made on the above screen without having to click on the individual day (highlighted in blue). – When updating a User’s settings in System Setup mentioned previously, do not select ‘The person must enter the start and end time for each time entry’, otherwise the amount of hours is inputted on the screenshot as above.

An Employee User can select the date they wish to enter the time worked by using the calendar at the left of the screen :



The screenshot shows the Croner Virtual Clock interface. At the top, it displays the user's name 'Donald Bailey (Employee)' and 'Virtual Clock'. Below the navigation bar, the date '21 November 2016' is selected. A calendar on the left shows the date '21' is highlighted. The main table has columns for Client-Project, Task, Start Time, End Time, Total, and Note. The table is currently empty, with dropdown menus for selecting a project and task. At the bottom, there are buttons for 'Add New Lines', 'Save Timesheet', 'Save & Close', 'Undo To Last Time Saved', and 'Close'.

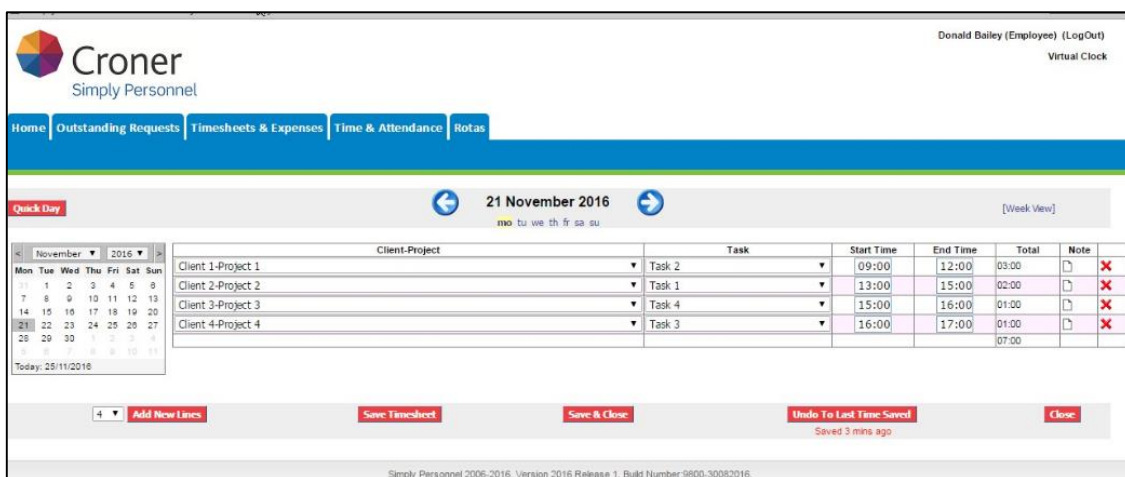
Once selected, a user can select a customer/project and a task. The terminology of these can be defined within the System Setup by an Administrator. Refer to the previous section (Account Setup Wizard).

A user would then enter the start and end times that have been worked, the timesheet will total up the hours worked at the end of each column, and a user may also be required to enter notes which can be done by clicking on the note icon to the right of the timesheet.

A user can save the timesheet at any time and they can also save and close the timesheet and come back to it at a later date to complete.

### My Timesheets:

This will show a user all of the timesheets that have been submitted, approved or are waiting approval.



The screenshot shows the Croner Virtual Clock interface with a completed timesheet. The date '21 November 2016' is selected. The table now contains four rows of data:

Client-Project	Task	Start Time	End Time	Total	Note
Client 1-Project 1	Task 2	09:00	12:00	03:00	[Note Icon] [X]
Client 2-Project 2	Task 1	13:00	15:00	02:00	[Note Icon] [X]
Client 3-Project 3	Task 4	15:00	16:00	01:00	[Note Icon] [X]
Client 4-Project 4	Task 3	16:00	17:00	01:00	[Note Icon] [X]
				07:00	

At the bottom, the 'Undo To Last Time Saved' button now says 'Saved 3 mins ago'.

To submit a time sheet, select the timesheet as above, then click on the view icon at the right of the screen.



**Confirm Timesheet Submission**


**Approver:** Pethick Chris (Chris.Pethick@ON1.co.uk)

**CC:**

Send copy of email to me

**Notes:**  
Please approve?

Then click on Submit Timesheet at the bottom of screen this will automatically send an alert and an email to the approver (this is set up by you administrator).


Donald Bailey (Employee) (LogOut)  
Virtual Clock

Home
Outstanding Requests
Timesheets & Expenses
Time & Attendance
Rotas


Personnel
Timesheets & Expenses
Time & Attendance

Show All timesheets
  Overdue timesheets
  Timesheets waiting for approval

Status	Timesheet Period	Hours Worked	Approver	Comments		
Open	Week 47: Nov 21 - Nov 27, 2016	37:30	Chris Pethick			
Submitted	Week 46: Nov 14 - Nov 20, 2016	00:00	Chris Pethick	Show Comments >>		
Open	Week 45: Nov 07 - Nov 13, 2016	00:00	Chris Pethick			
Approved	Week 44: Oct 31 - Nov 06, 2016	36:30	Chris Pethick	Show Comments >>		

Back to Outstanding Requests
Enter NEW Timesheet

Simply Personnel 2006-2016, Version 2016 Release 1, Build Number 9800-30082016.



Home
Outstanding Requests
Timesheets & Expenses
Time & Attendance

Personnel
Timesheets & Expenses
Time & Attendance

**Outstanding Requests : Timesheets**

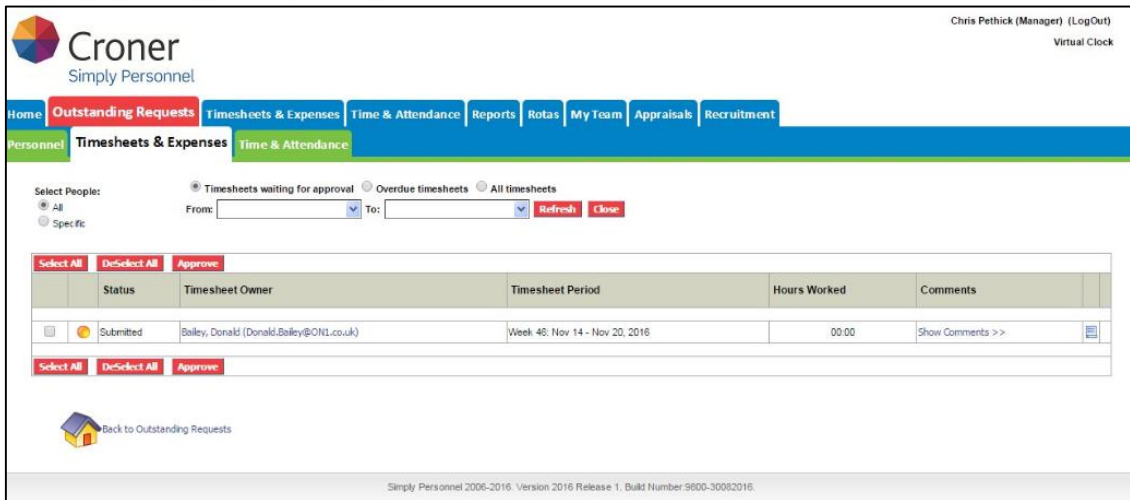
- [View Staff Timesheet Requests](#)  
Use this option to view the staff timesheets waiting for your approval.
- [View My Timesheet Requests](#)  
Use this option to view your timesheets waiting approval.

**Outstanding Requests : Expenses**

- [View Staff Expense Requests](#)  
Use this option to view the staff expenses waiting for your approval.
- [View My Expense Requests](#)  
Use this option to view your own expenses waiting approval.

A Manager profile gives the user access to View their Staff Timesheet and Expenses requests which can then be approved.

They can also view their own submitted entries as an employee,




Chris Pethick (Manager) (Log Out)  
Virtual Clock

Home Outstanding Requests Timesheets & Expenses Time & Attendance Reports Rotas My Team Appraisals Recruitment

Personnel Timesheets & Expenses Time & Attendance

Select People:  Timesheets waiting for approval  Overdue timesheets  All timesheets  
 All  Specific  
 From: [ ] To: [ ] Refresh Close

Select All	DeSelect All	Approve	Status	Timesheet Owner	Timesheet Period	Hours Worked	Comments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bailey, Donald (Donald.Bailey@ON1.co.uk)	Week 46: Nov 14 - Nov 20, 2016	00:00	Show Comments >> <input type="button" value=""/>

 Back to Outstanding Requests

Simply Personnel 2006-2016. Version 2016 Release 1. Build Number 9600-30082016.

The Manager can view submitted requests from employees here and use the tick buttons to the left of the sheet status. The Select All feature can be used to highlight all requests to update en masse. The sheets can also be filtered from the drop downs from the top.

The Timesheet entry can be expanded by clicking on the button on the right after the comments area. This will then give a detailed breakdown of the sheet.

Approving/Updating/Deleting any entries from this point will send an email to both users to confirm.

**Enter Expenses:**

Expense

Expense Entry	Enter my expenses
My Expenses	Review all my expenses

To enter an expense, select the Expense Entry option, this will open up the following window and will create the expense sheet:



The screenshot shows a window titled "Create New Expensesheet" with the following fields:

- Expensesheet Title: Expenses W/C 21-11-16
- Expensesheet Date: 21/11/2016
- Allow Foreign Currency To Be Entered:
- Opening Mileage: 40,000
- Closing Mileage: 40,500
- Vehicle Registration: AB12 45F
- Extra Information: N/A

Buttons: Add, Cancel


A user can give the expense sheet a title (i.e. the week commencing date) there are also options to add the mileage and vehicle registration (if the administrator has set it), also input extra information if required.

Click on add and the expense sheet will open up, additional entries can be added to the sheet.

Each expense sheet is given a unique tracking number shown at the top of the sheet:

Expenses W/C 21-11-16			Balance
<a href="#">Show Details</a>			
Receipt Tracking ID	Date	Type	Extra Information
00000001	21/11/2016	Petrol 1.6-2.0	N/A
00000002	21/11/2016	Subsistence	Got lunch at service

To add an expense click on Add New Expense, the following window will appear:


Add New Expense
✕

Expense Date:\*

Expense Type:\*

Mileage(mi):\*

Opening Mileage:

Closing Mileage:

From:

To:

Amount Claimed:\*

Payment Method:\*

Extra Information:\*

Notes:

Got Receipt:  Receipt Tracking ID will be shown on the list behind (Write this on your receipt)

Taxable:

This expense item has been paid by me and should be reclaimed.

Fill in all of the mandatory fields, the expense types are a predefined option previously set by the administrator. If a receipt is available make sure the box is ticked at the bottom as this will provide a tracking number for the receipt.

Once all of the information is complete click on Add. If the expense is for mileage, a user can select the option from drop down box. This will add an extra field to complete. Enter the distance in miles, and the amount claimed will work out the calculation of what the employee is entitled to. Click Add

## My Expenses:

This will take a user to a list of all of their expense sheets that have been open, submitted and approved.

To submit an expense sheet select the required by clicking on the green pencil, this will open up the expense sheet and then click on submit.

Are you sure you want to submit the expensesheet to the approver?

**Approver:** Pethick Chris (Chris.Pethick@ON1.co.uk)

**CC:**

Send copy of email to me

**Notes:**

My Expenses for the 21st

I confirm these expense items are accurate and incurred by me and I should be claiming for them

Ensure the tick box has been completed in order to submit the above sheet.

## Settings:

Settings	
My Projects	Manage my list of projects
My Tasks	Manage my list of tasks

## My Projects:

If the system administrator has allowed a user to specify which projects should be shown in their project list. A user can choose the projects to show.

If this part of the system is incomplete all projects will be shown when a user enters a timesheet.

## My Tasks:

As above, the system administrator has allowed a user to specify which projects should be shown in their project list. If this part of the system is incomplete all tasks will be shown when a user enters a timesheet.