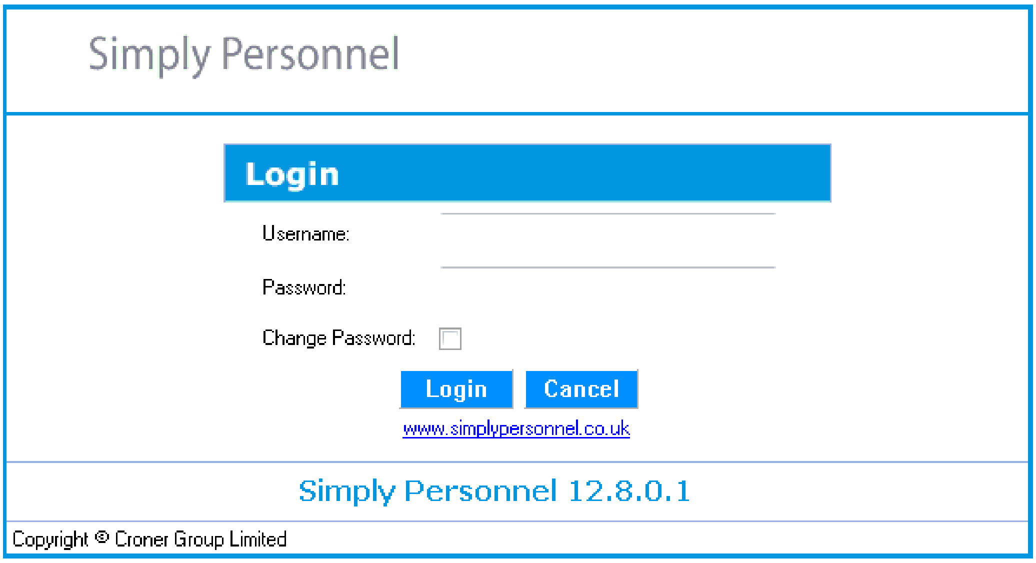
# Simply Personnel - Time Sheets & Expenses




-Training Workbook-

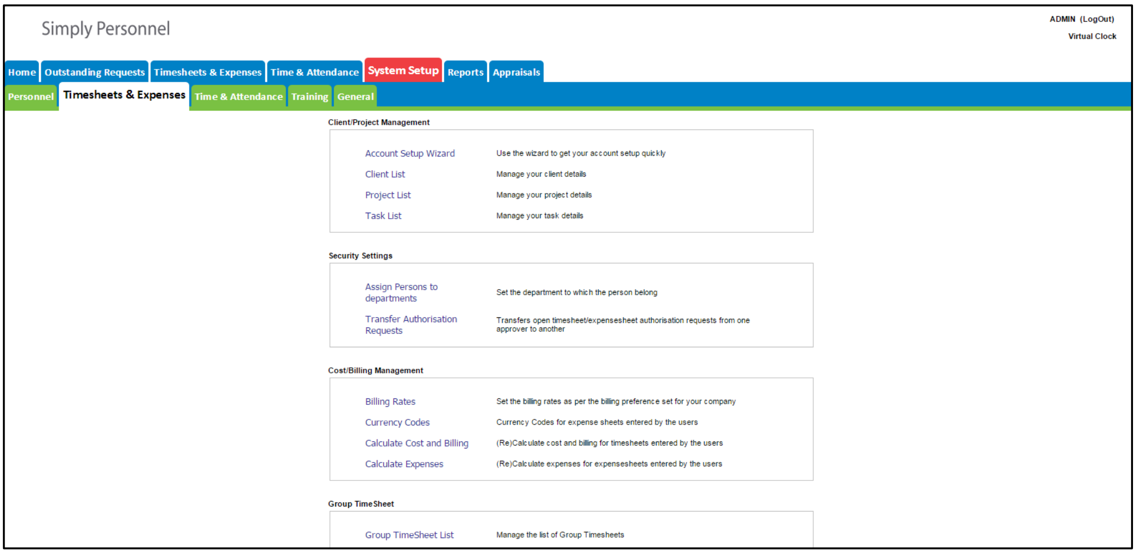
## Introduction to Simply Personnel Timesheets & Expenses

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.

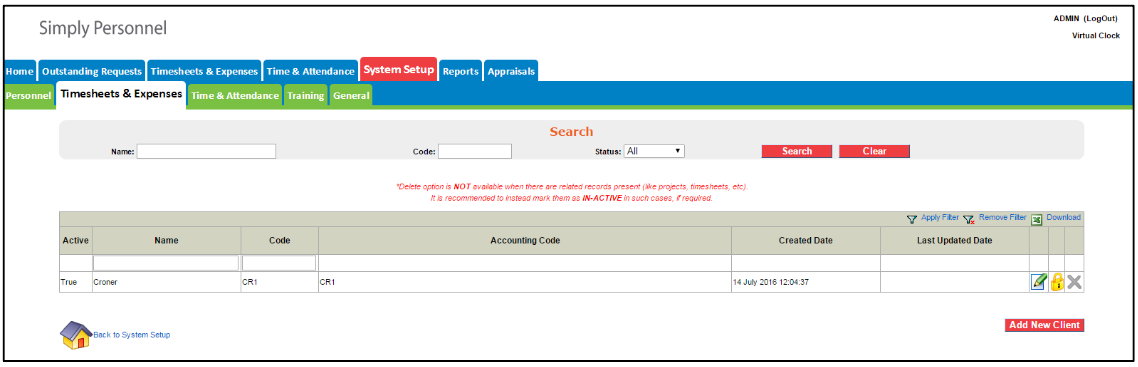



This is where an Administrator can setup the Timesheet & Expenses defaults for Employees / Managers to select and submit for approval.

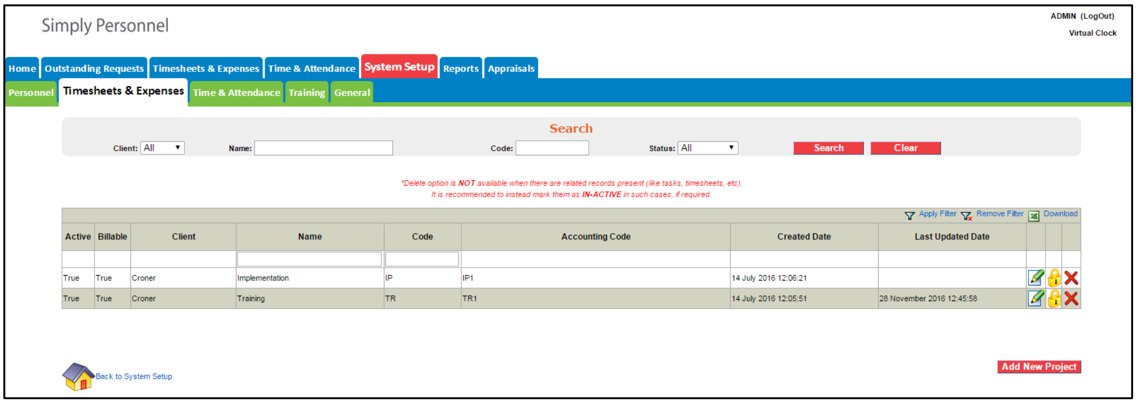
Select Account Setup Wizard to help populate the system with the relevant Client/Project/Task entries.

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

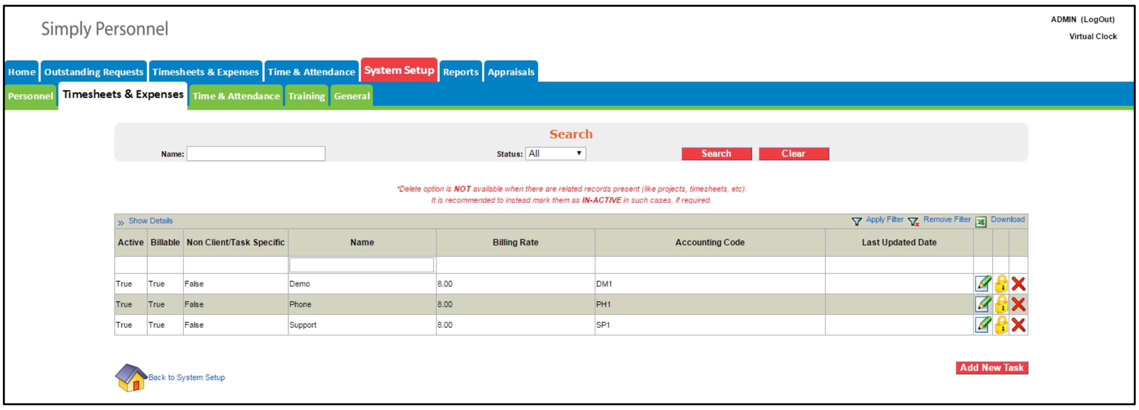
### Client List



## Project List

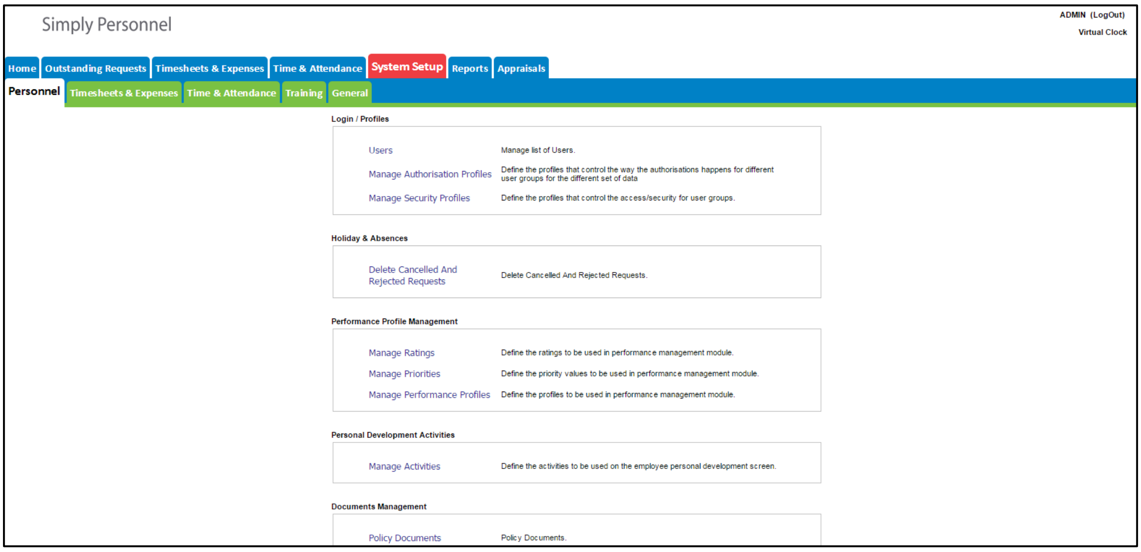



## Task List

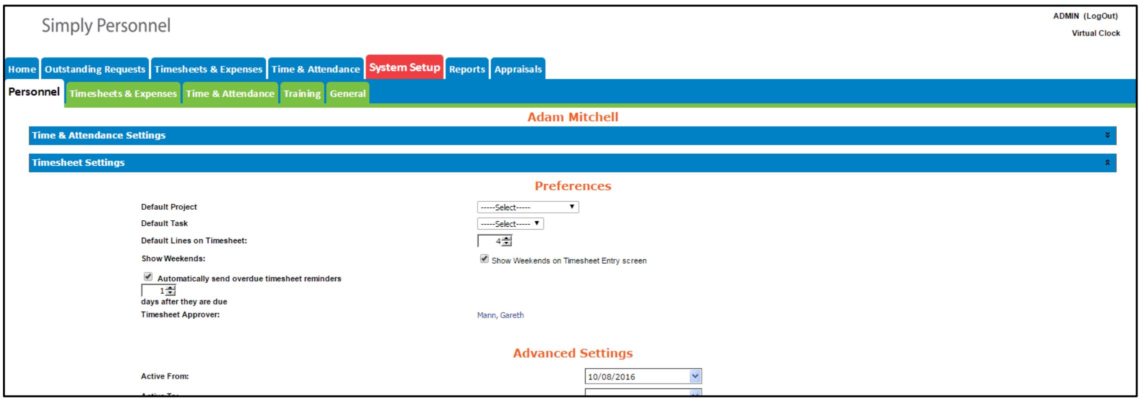


# Users System Setup

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

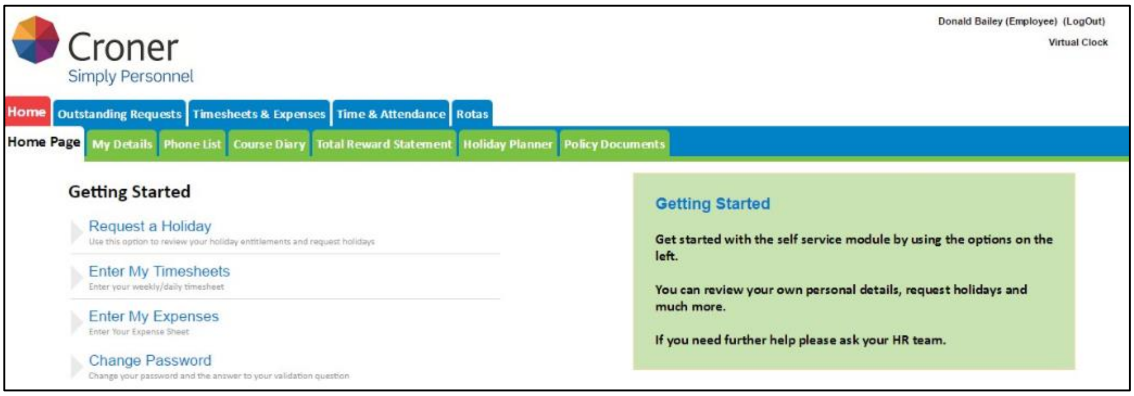



Each User within the system will need to be setup in order for the Employee / Manager to use the Timesheets & Expenses feature:



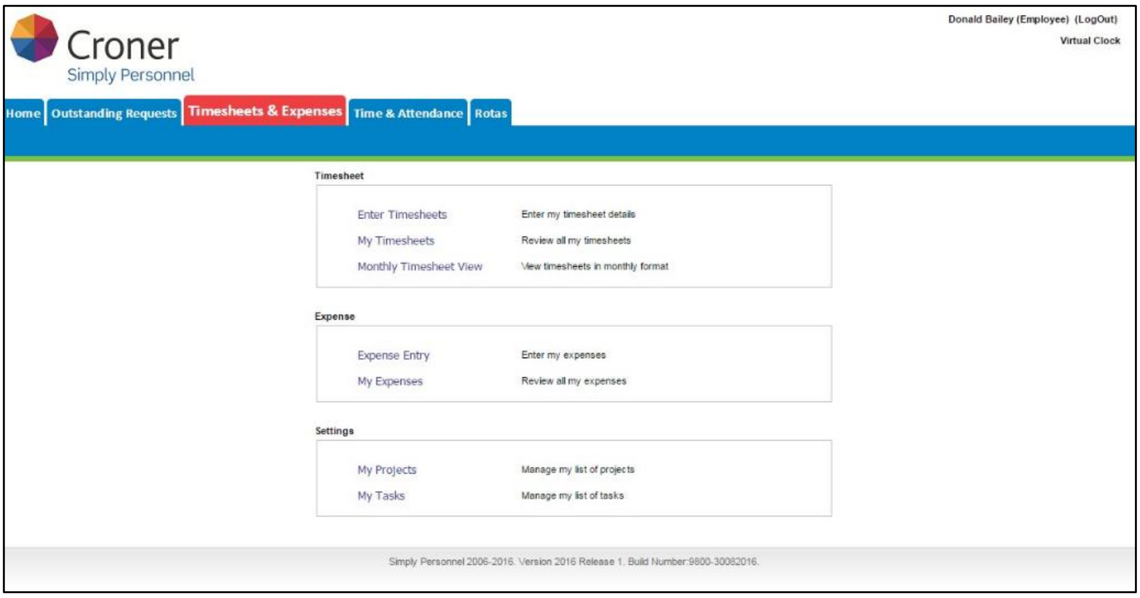

Scroll down and ensure the following has been setup (depending on if the Employee enters Timesheets etc.)

# Entering Timesheets and Expenses



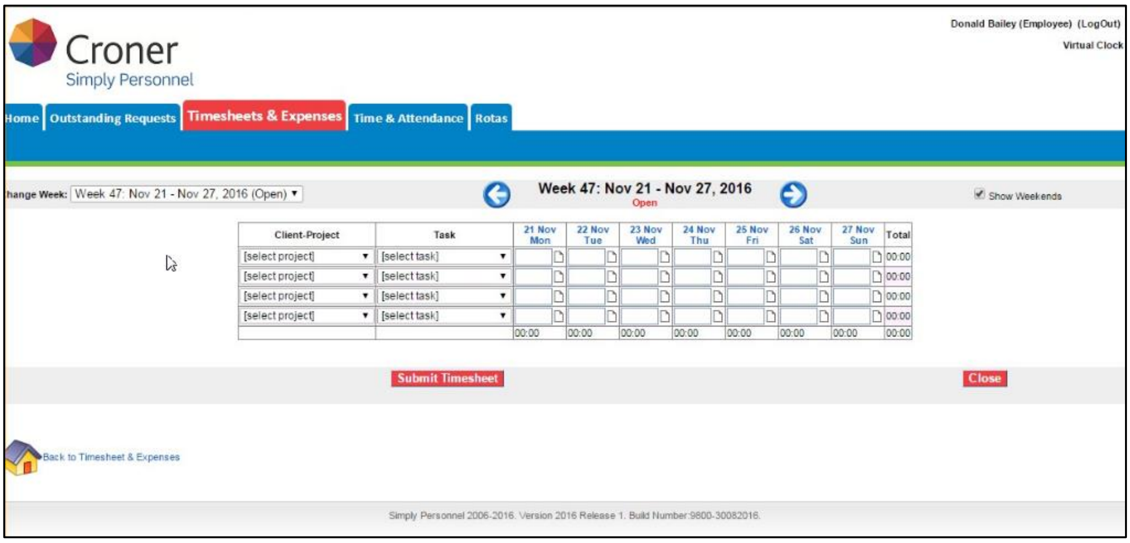

Anything that requires the user's attention will be displayed in the bottom right corner of the screen:


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



## Entering Timesheets

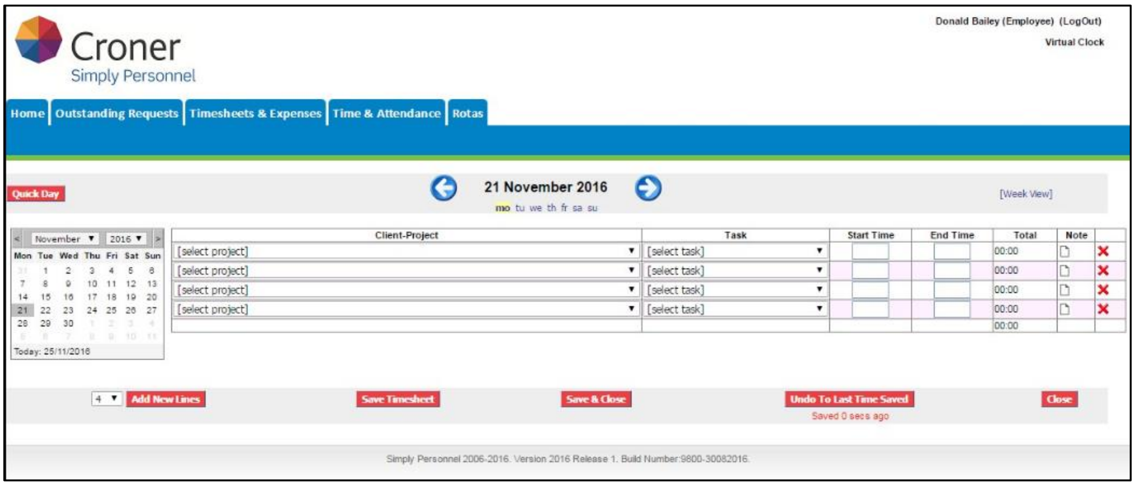

This will open up a blank timesheet.




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 :



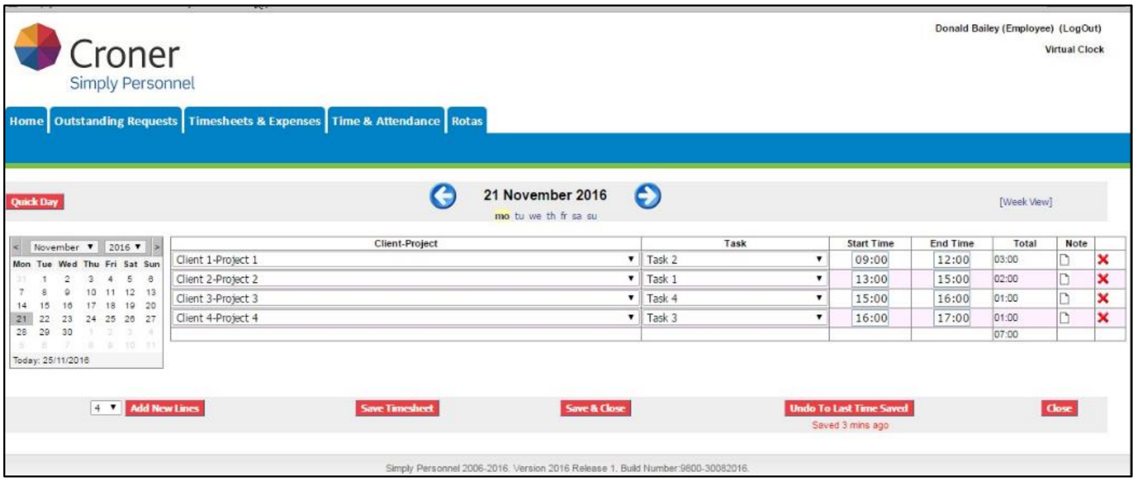

Once selected, a user can the select a customer/project and a task. The terminology of these can be defined within the System Setup by and Administrator. Refer to the previous section (Account Setup Wizard).

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.

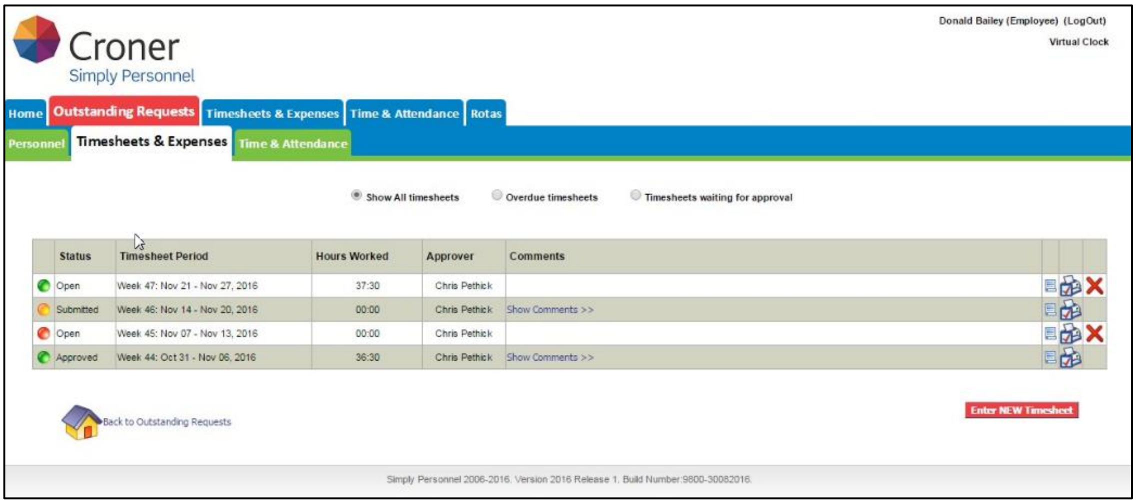
## My Timesheets:

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




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

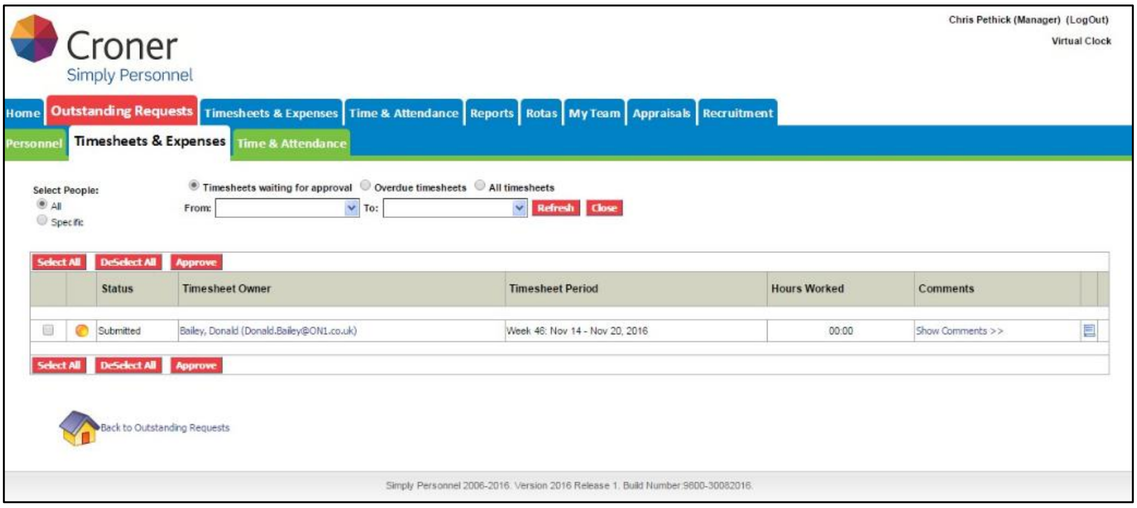

Then click on Submit Timesheet at the bottom of screen this will automatically send an alert and an email to the approver (this is set up by you administrator).





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

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



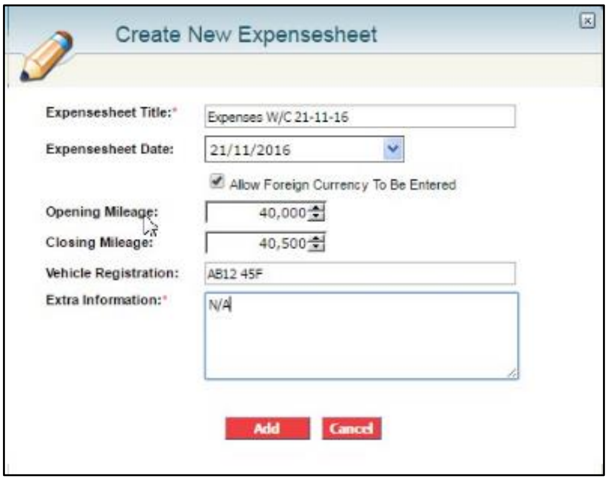

The Manger can view submitted requests from employees here and use the tick buttons to the left of the sheet status. The Select All feature can be used to highlight all requests to update en masse. The sheets can also be filtered from the drop downs from the top.

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:

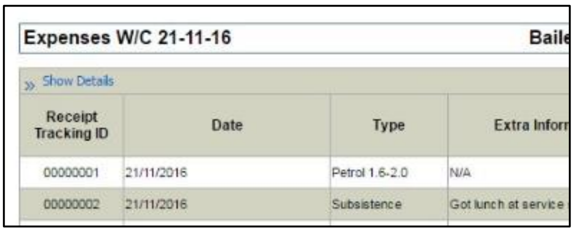

To enter an expense, select the Expense Entry option, this will open up the following window and will create the expense sheet:




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.

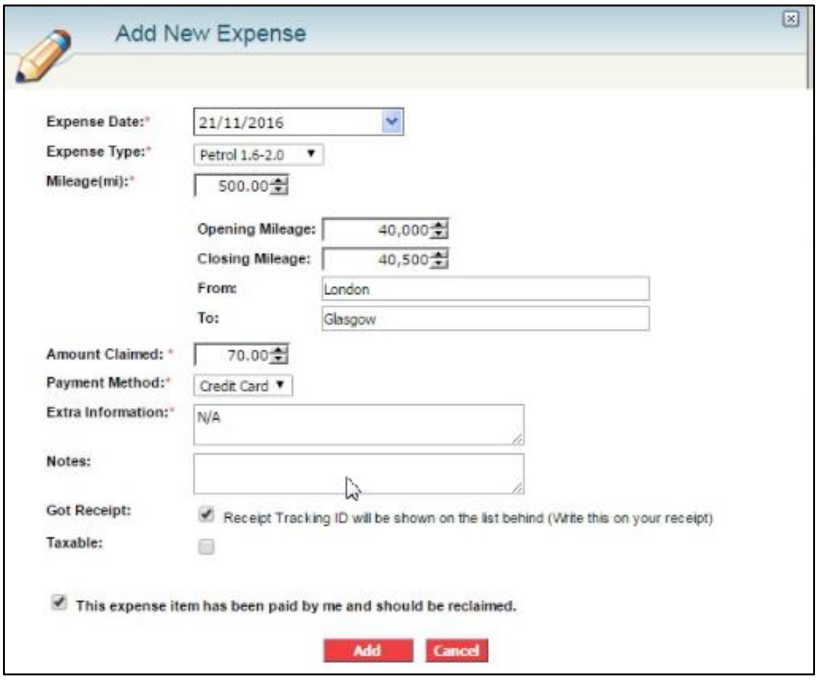
Each expense sheet is given a unique tracking number shown at the top of the sheet:


Expenses W/C 21-11-16

Show Details

| Receipt Tracking ID | Date | Type | Extra Infor |
|---|---|---|---|
| 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:




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.



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

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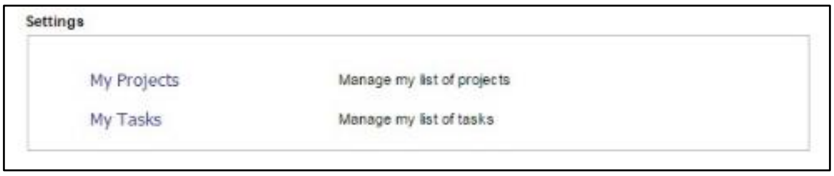
## Settings:




## 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.