Simply Personnel
Time Sheets & Expenses

Employee User Guide

Simply Personnel: Timesheets & Exspenses

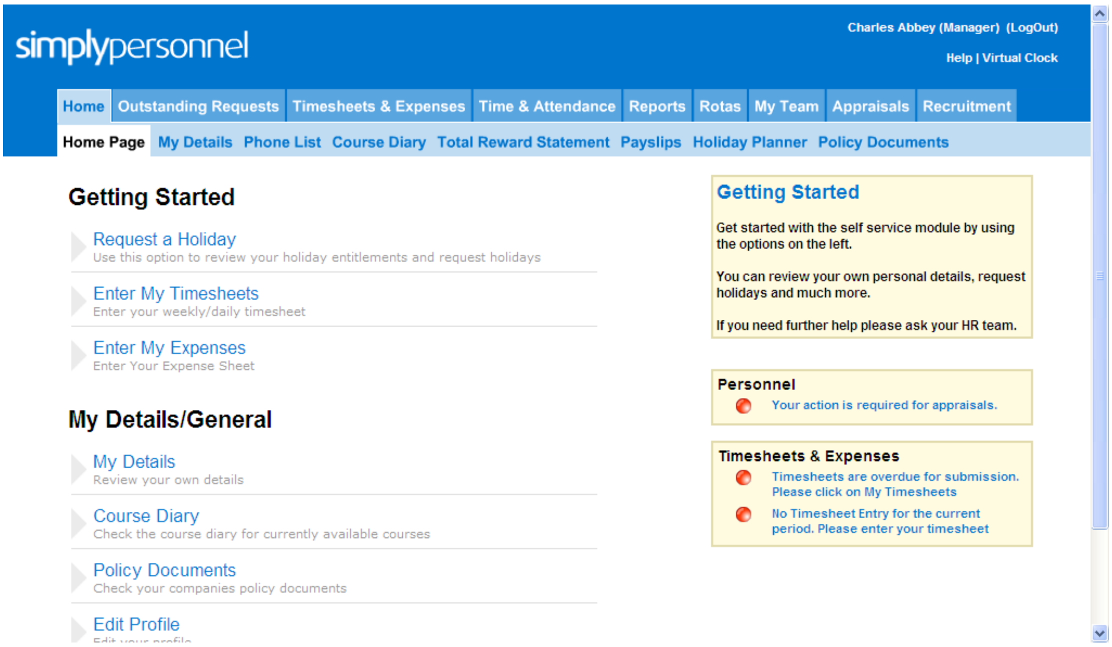
This document provides step-by-step guide for employee users to give an easy understanding on using the timesheets and expenses system within the self service module.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

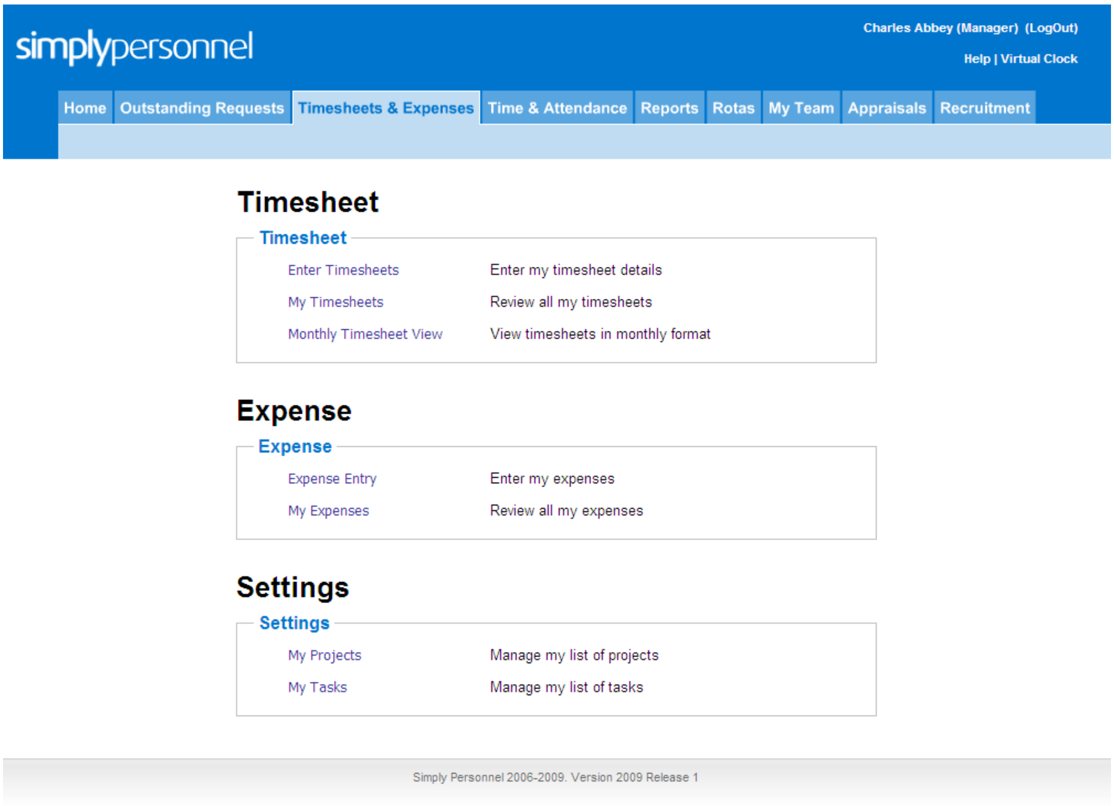
Thank you

The Simply Personnel Team.

Log in to you self service account and you will see the main dashboard.



You enter your timesheet from this screen or you can select the tab Timesheets and Expenses (the screen below will show)



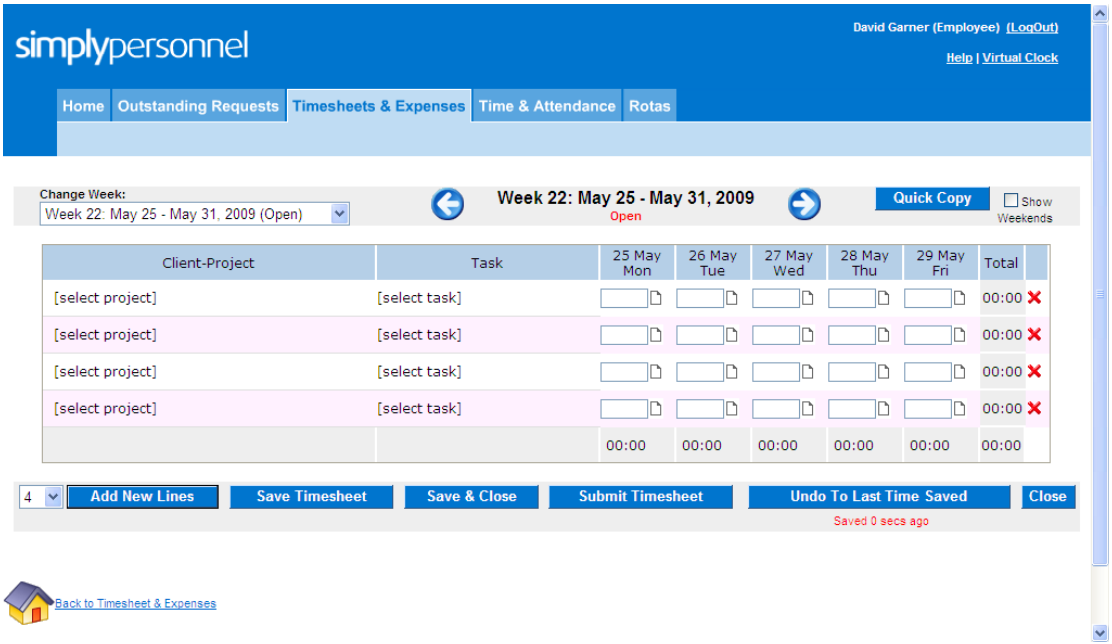
Timesheet

Timesheet

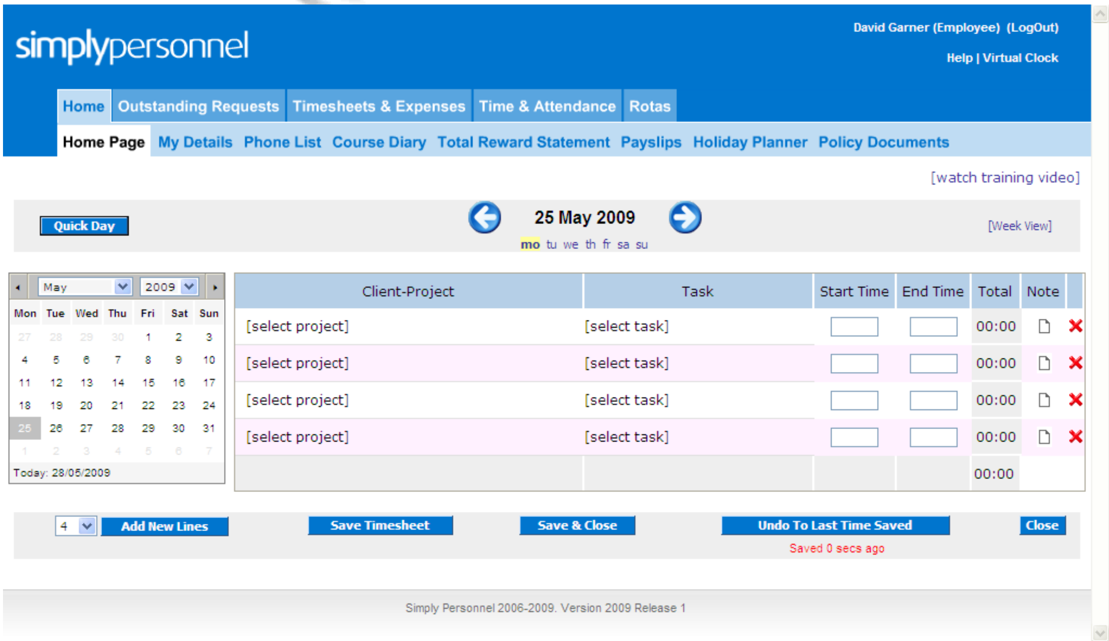
Enter Timesheets	Enter my timesheet details
My Timesheets	Review all my timesheets
Monthly Timesheet View	View timesheets in monthly format

Enter Timesheets:

This will open up a blank timesheets.



It will default to the current week, then click on the day you wish to enter your time worked. You can select the date you wish to enter the time worked by using the calendar at the left of the screen.

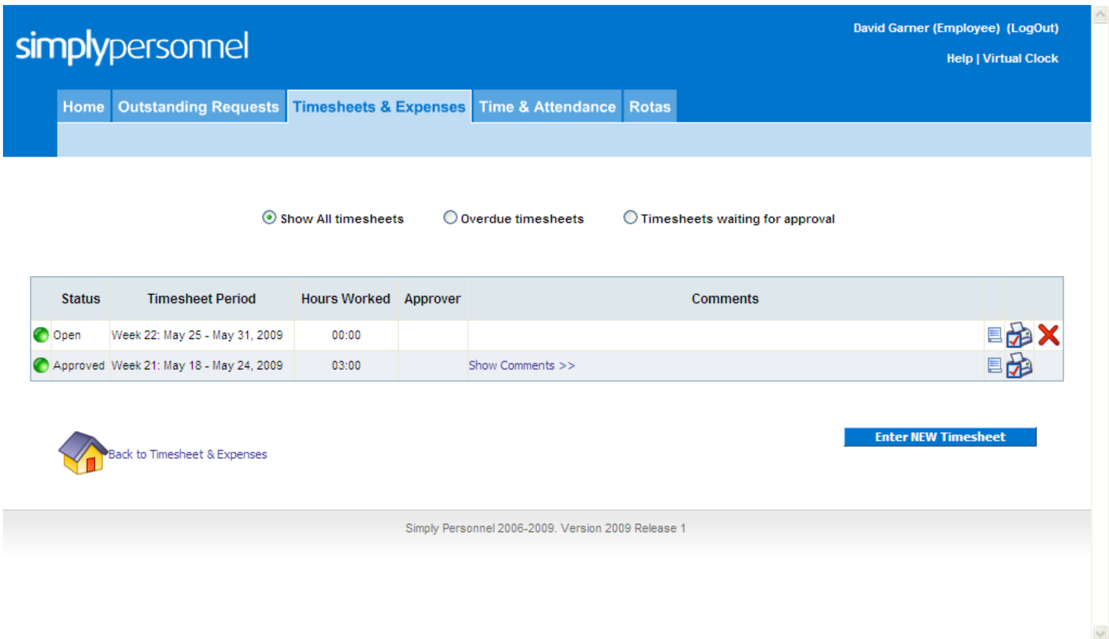


Once you have the correct date select a customer/project and a task/phase (these will have been set up by you administrator) then enter the start and end times that you have worked, the timesheet will total up the hours worked at the end of each column, may also be required to enter notes you can do this by clicking on the note icon to the right of the timesheet.

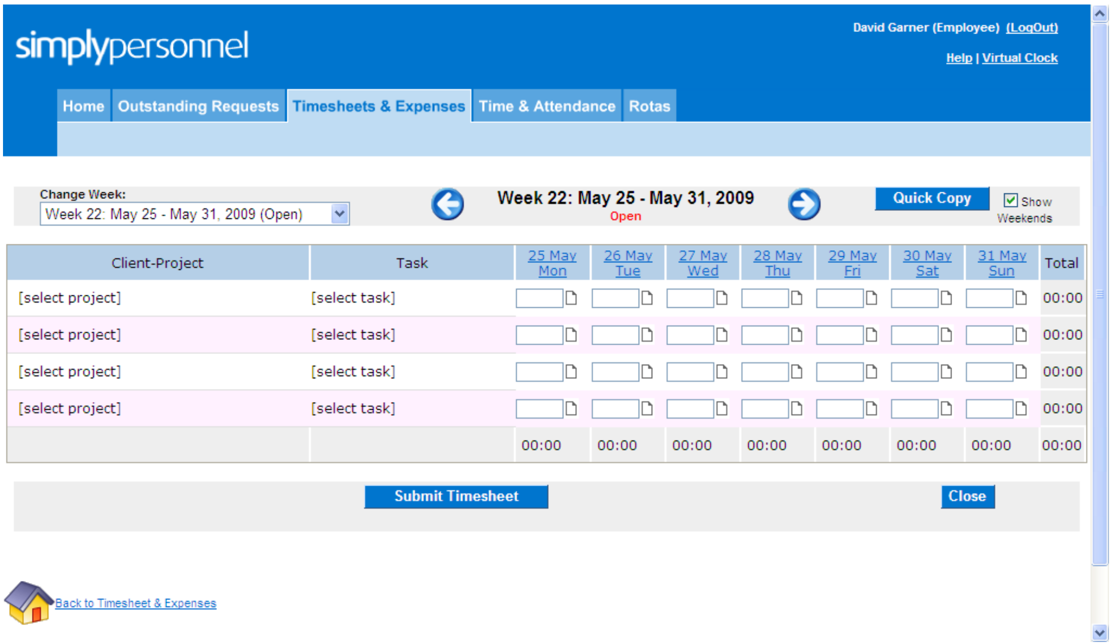
You can save your timesheet at any time and you can also save and close your timesheet and comeback to it at a later date to complete.

My Timesheets:

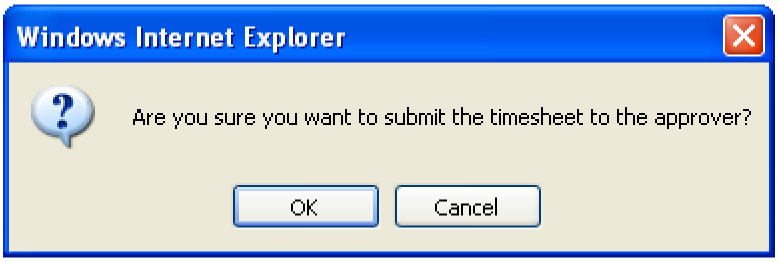
This will show you all of the timesheets that you have submitted, have been approved or are waiting approval.

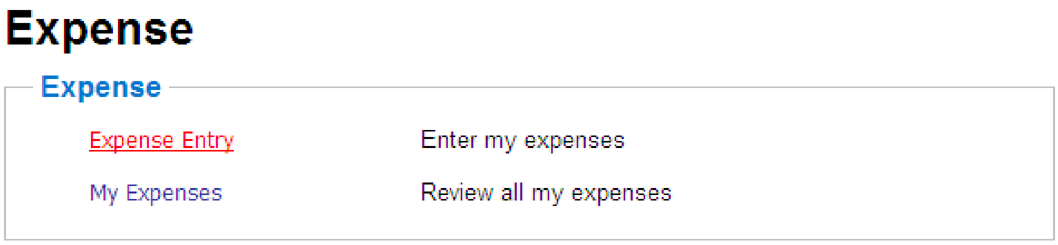


To submit a time sheets , select the timesheet you want click on the view icon at the right of the screen.

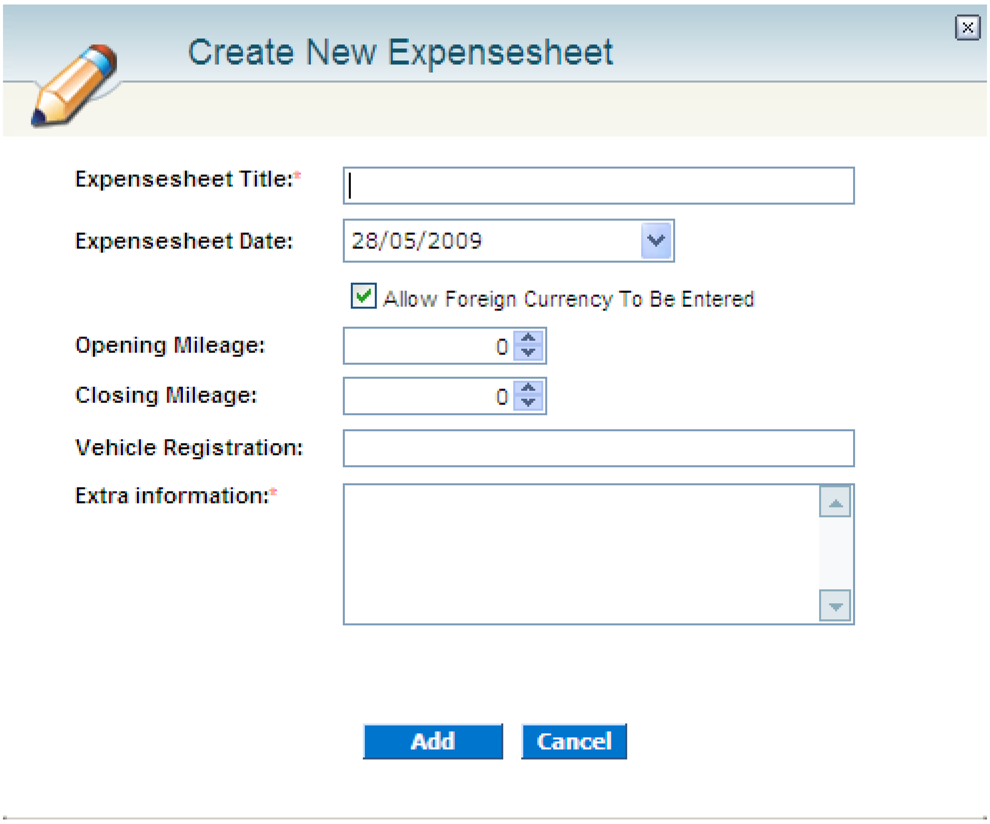


Then click on Submit Timesheet at the bottom of screen this will automatically send an alert and an email to you approver (this is set up by you administrator).





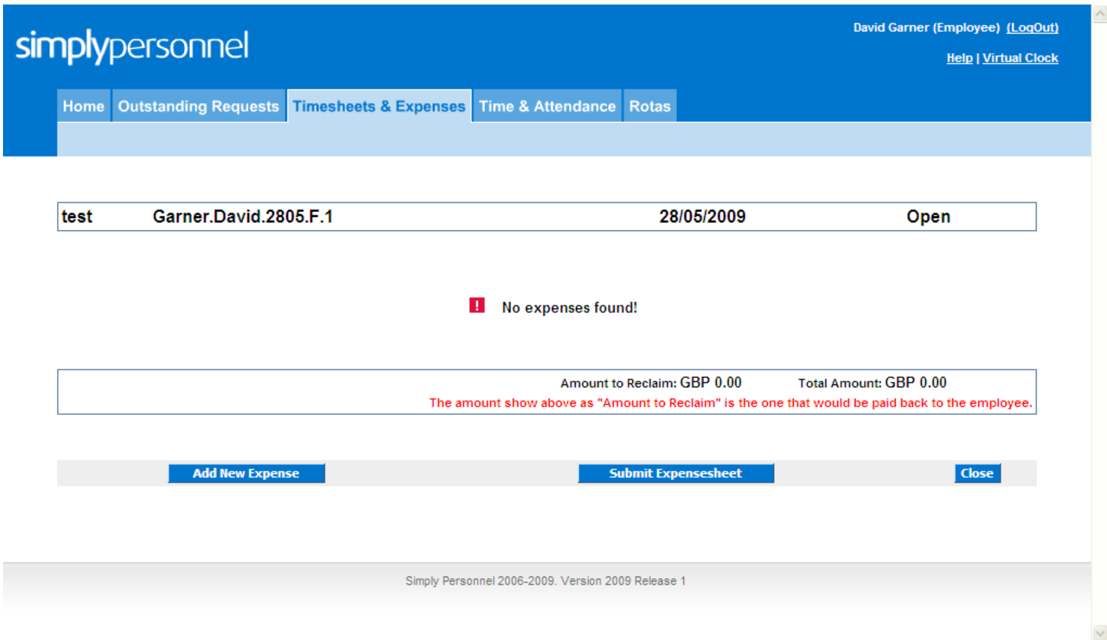
To enter an expense entry select the option, this will open up the following window and will create the expense sheet.



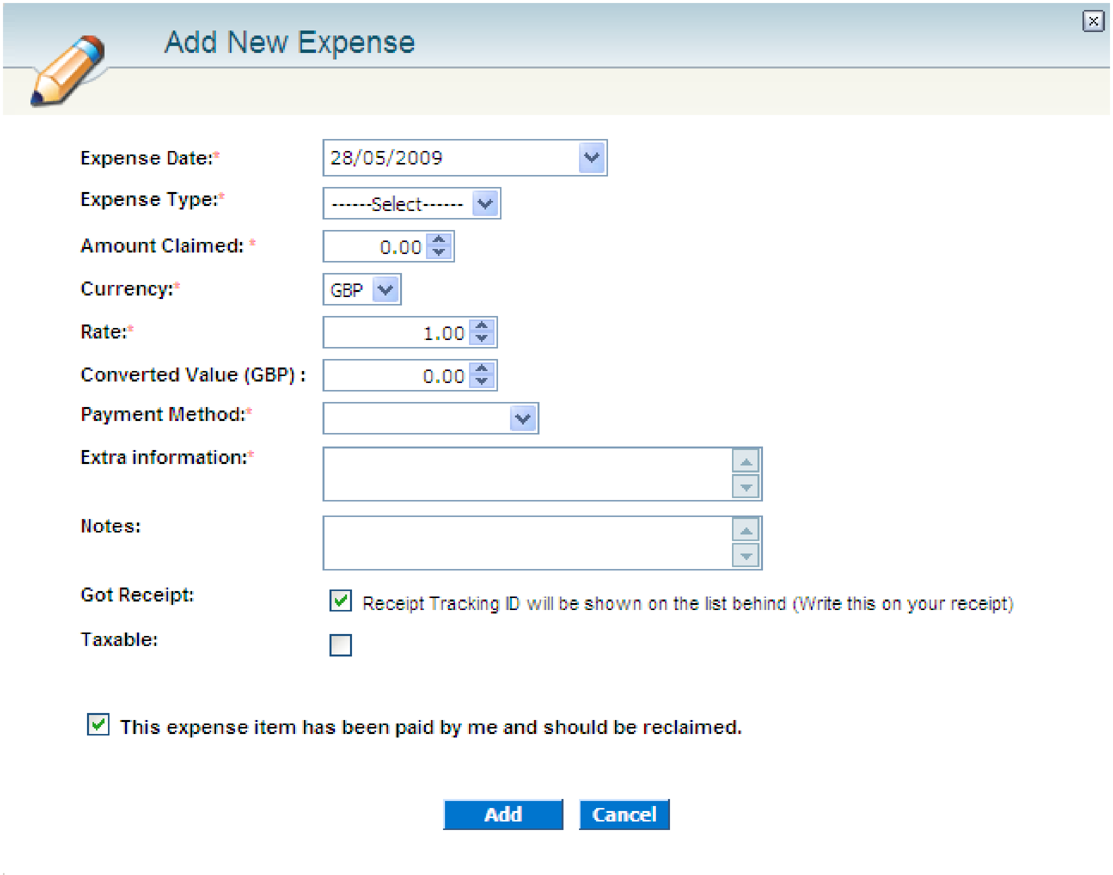
You are required to give the expense sheet a title (i.e the week commencing date) there are also option to add the mileage and vehicle registration (if the administrator has set it), also input extra information.

Click on add and the expense sheet will open up, you can now start to add expenses.

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

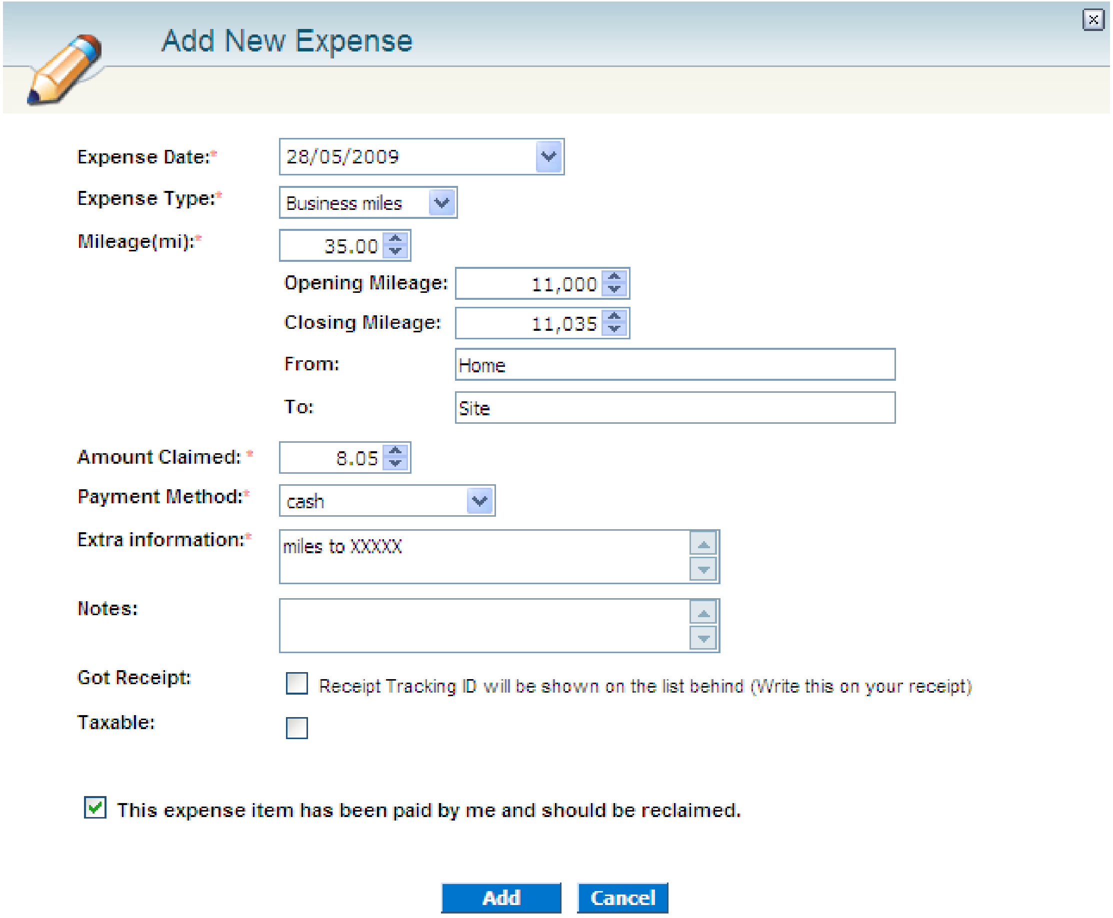


To add an expense click on Add New Expense, the following window will appear.



Fill in all of the mandatory fields, the expense type are a predefined option that your administrator has already set up. If you have a receipt make sure the box is tick at the bottom as this will give you a tracking number for the receipt. Once all of the information is complete click on Add…. This will then add it to the expense sheet.

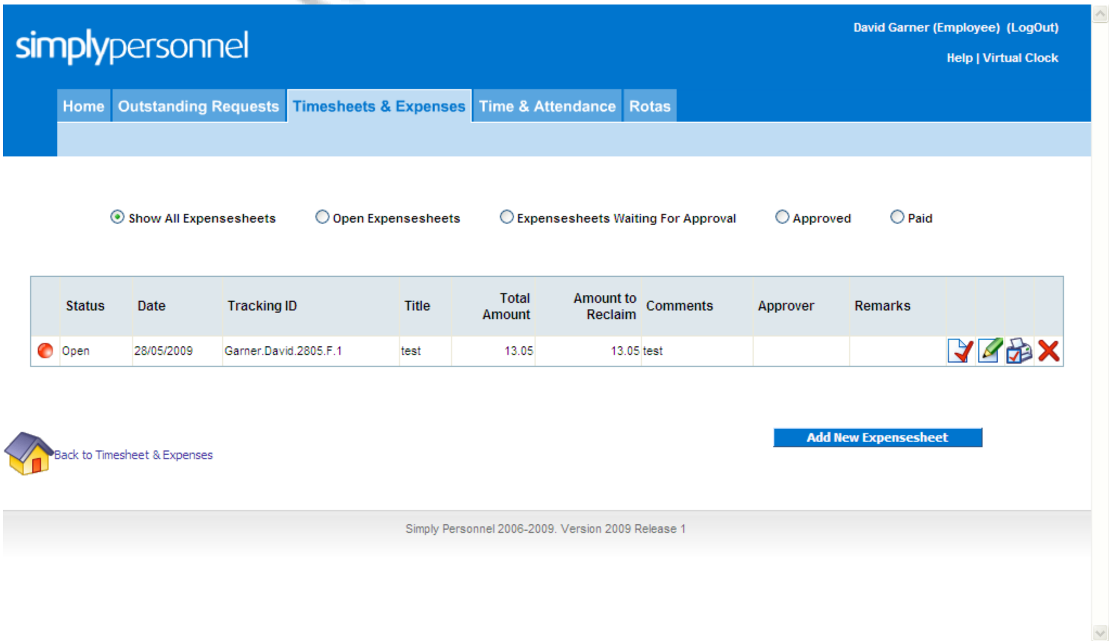
If your expense is for mileage, you select the option from type drop down box. This will add some extra field that you will need to complete.



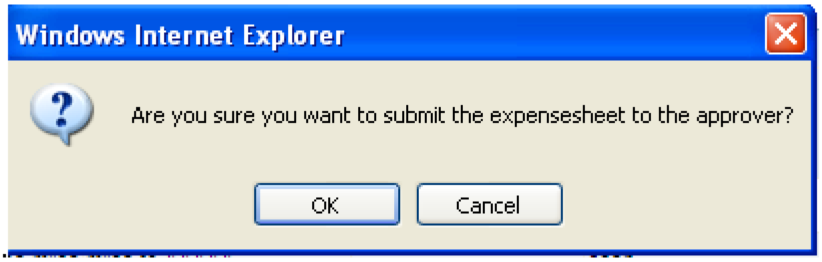
Enter the distance in miles, and the amount claimed will work out the calculation of what you are entitled to. Again click on Add….. to add this to the expense sheet.

My Expenses:

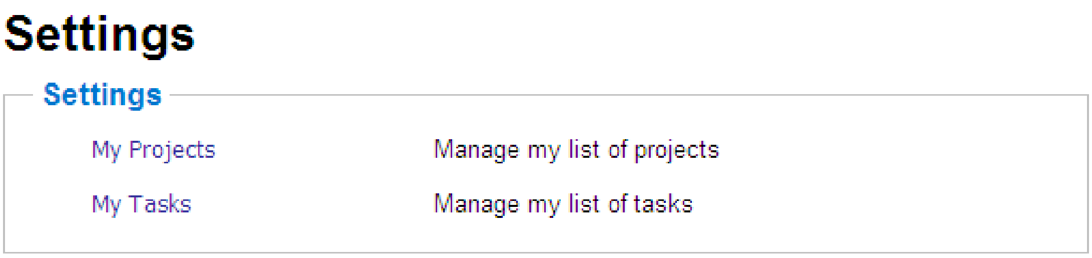
This will take you to a list of all of your expense sheets that you have open, have been submitted and have been approved.



To submit your expense sheet select the one you require by clicking on the green pencil, this will open up the expense sheet, click on submit at the bottom of the screen



Settings:



My Projects:

If your system administrator has allowed you to specify which projects should be shown in your project list you can select this option to choose the projects to show.

If you don't add anything to this list then all projects will be shown when you come to enter your timesheet.

My Tasks:

If your system administrator has allowed you to specify which tasks should be shown in your task list you can select this option to choose the tasks to show.

If you don't add anything to this list then all tasks will be shown when you come to enter your timesheet.