

Simply Personnel Time Sheets & Expenses

Employee User Guide

Simply Personnel: Timesheets & Expenses

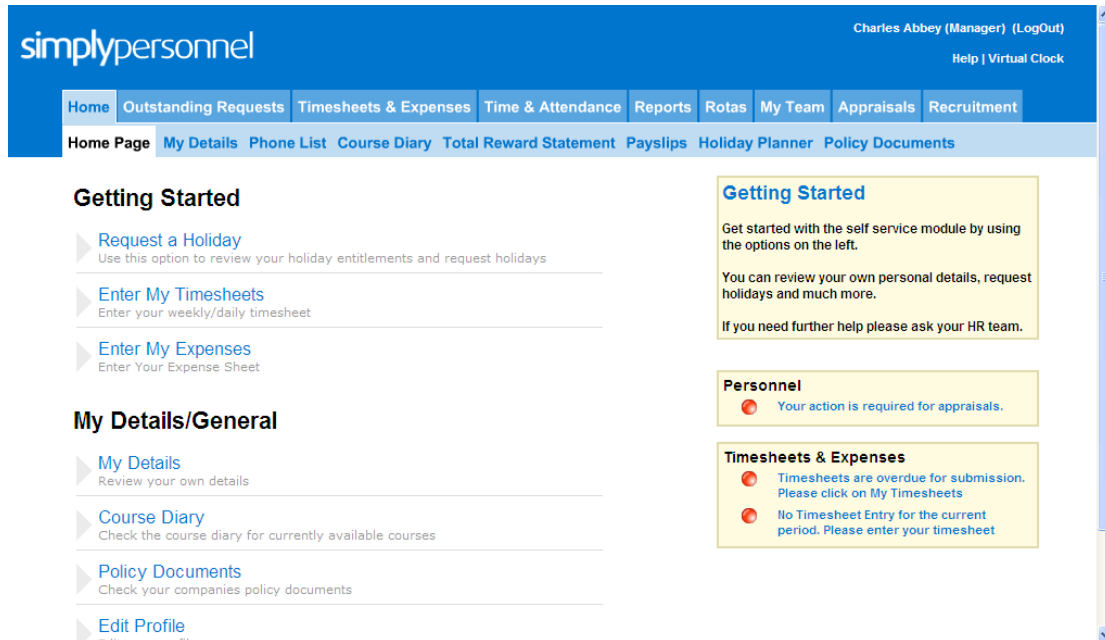
This document provides step-by-step guide for employee users to give an easy understanding on using the timesheets and expenses system within the self service module.

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.



The dashboard shows a navigation menu with tabs: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, Reports, Rotas, My Team, Appraisals, Recruitment. Below this is a sub-menu: Home Page, My Details, Phone List, Course Diary, Total Reward Statement, Payslips, Holiday Planner, Policy Documents.

Getting Started

- [Request a Holiday](#)
Use this option to review your holiday entitlements and request holidays
- [Enter My Timesheets](#)
Enter your weekly/daily timesheet
- [Enter My Expenses](#)
Enter Your Expense Sheet

My Details/General

- [My Details](#)
Review your own details
- [Course Diary](#)
Check the course diary for currently available courses
- [Policy Documents](#)
Check your companies policy documents
- [Edit Profile](#)
Edit your profile

Getting Started (Yellow box)

Get started with the self service module by using the options on the left.

You can review your own personal details, request holidays and much more.

If you need further help please ask your HR team.

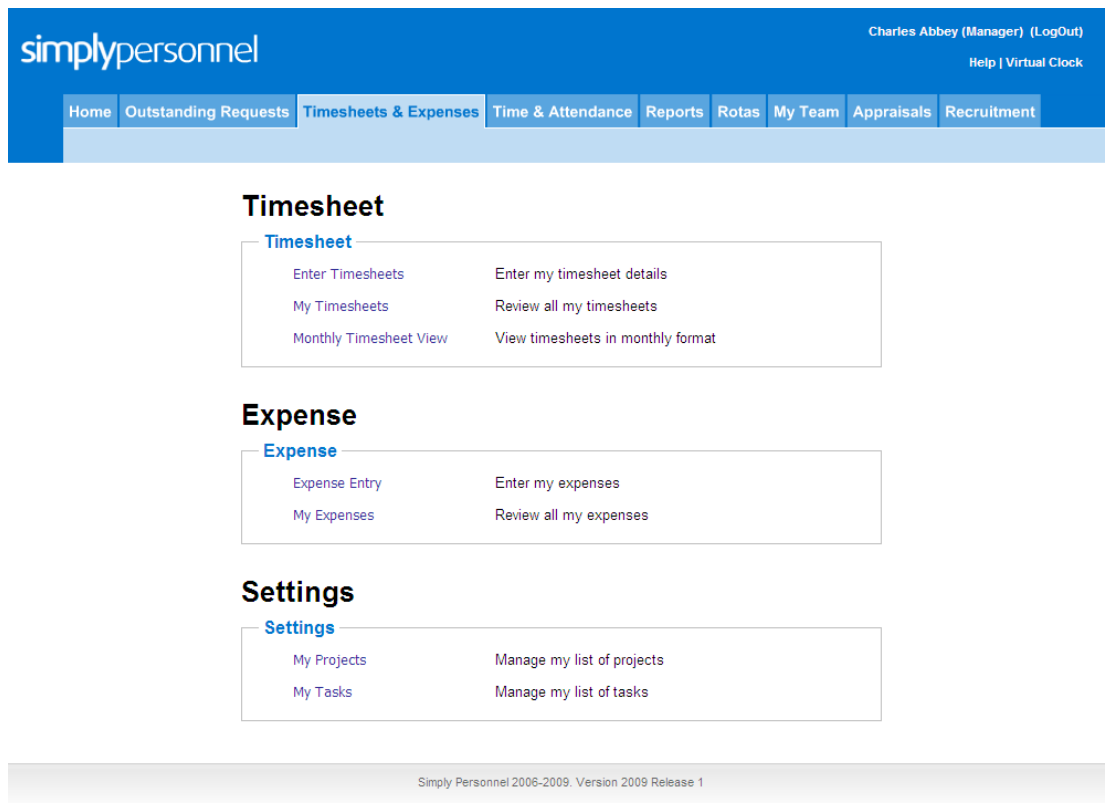
Personnel (Yellow box)

Your action is required for appraisals.

Timesheets & Expenses (Yellow box)

- Timesheets are overdue for submission. Please click on My Timesheets
- No Timesheet Entry for the current period. Please enter your timesheet

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



The screen shows the 'Timesheets & Expenses' section with a navigation menu: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, Reports, Rotas, My Team, Appraisals, Recruitment.

Timesheet

Timesheet

- [Enter Timesheets](#) Enter my timesheet details
- [My Timesheets](#) Review all my timesheets
- [Monthly Timesheet View](#) View timesheets in monthly format

Expense

Expense

- [Expense Entry](#) Enter my expenses
- [My Expenses](#) Review all my expenses

Settings

Settings

- [My Projects](#) Manage my list of projects
- [My Tasks](#) Manage my list of tasks

Simply Personnel 2006-2009. Version 2009 Release 1

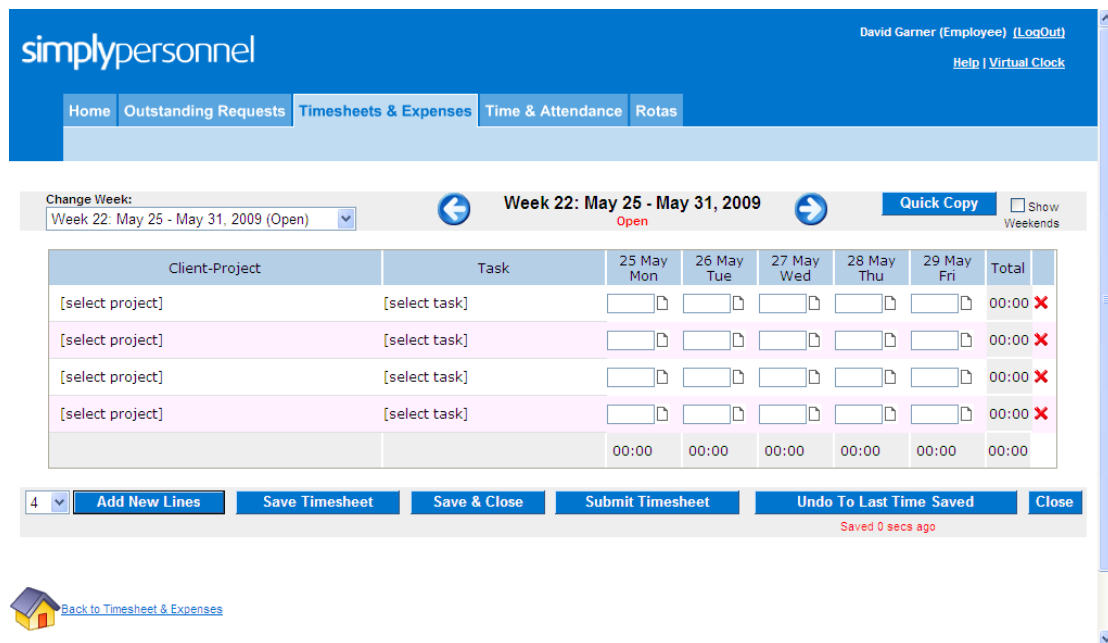
Timesheet

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.

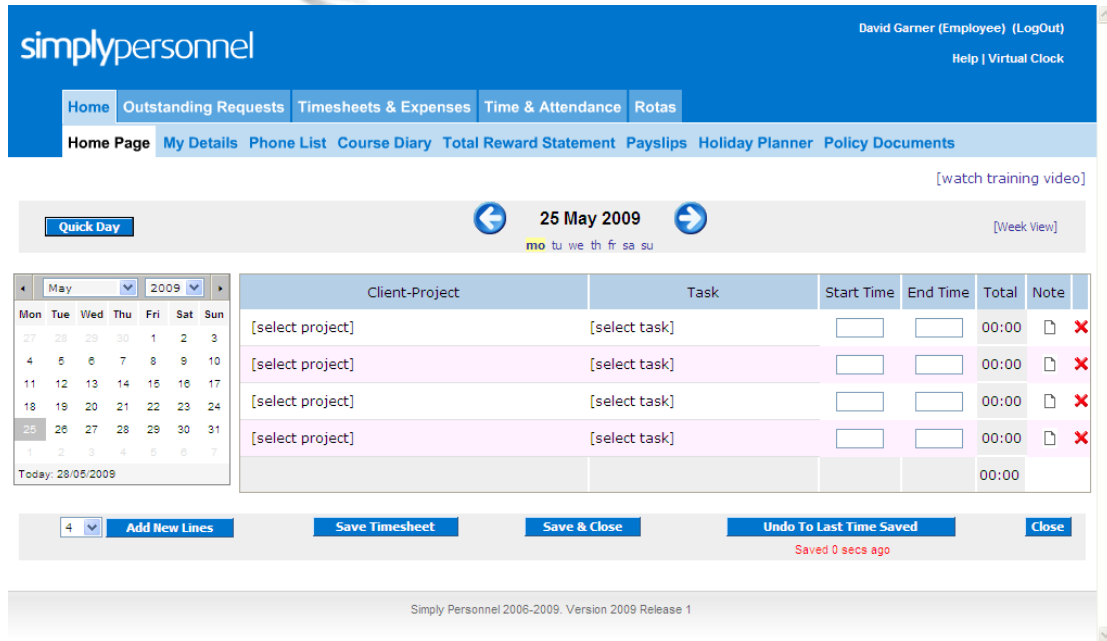


The screenshot shows the 'Enter Timesheets' page in the simplypersonnel system. At the top, the user is identified as 'David Garner (Employee)' with a 'LogOut' link. A navigation menu includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses' (selected), 'Time & Attendance', and 'Rotas'. The main area is titled 'Week 22: May 25 - May 31, 2009' and is marked as 'Open'. A 'Quick Copy' button and a 'Show Weekends' checkbox are also present. Below this is a table for entering time:

Client-Project	Task	25 May Mon	26 May Tue	27 May Wed	28 May Thu	29 May Fri	Total
[select project]	[select task]	<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"/>	00:00 ✘
[select project]	[select task]	<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"/>	00:00 ✘
		00:00	00:00	00:00	00:00	00:00	00:00

At the bottom of the table are buttons: 'Add New Lines', 'Save Timesheet', 'Save & Close', 'Submit Timesheet', 'Undo To Last Time Saved', and 'Close'. A status message indicates 'Saved 0 secs ago'. A 'Back to Timesheet & Expenses' link is located below the table.

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.

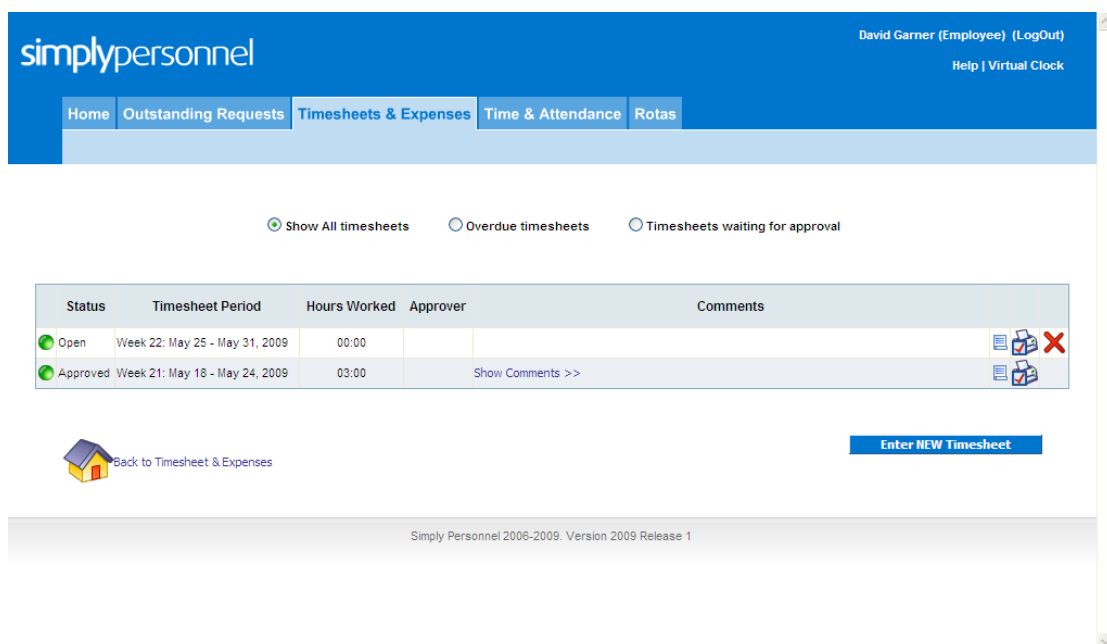


Once you have the correct date select a customer/project and a task/phase (these will have been set up by you administrator) then enter the start and end times that you have worked, the timesheet will total up the hours worked at the end of each column, may also be required to enter notes you can do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

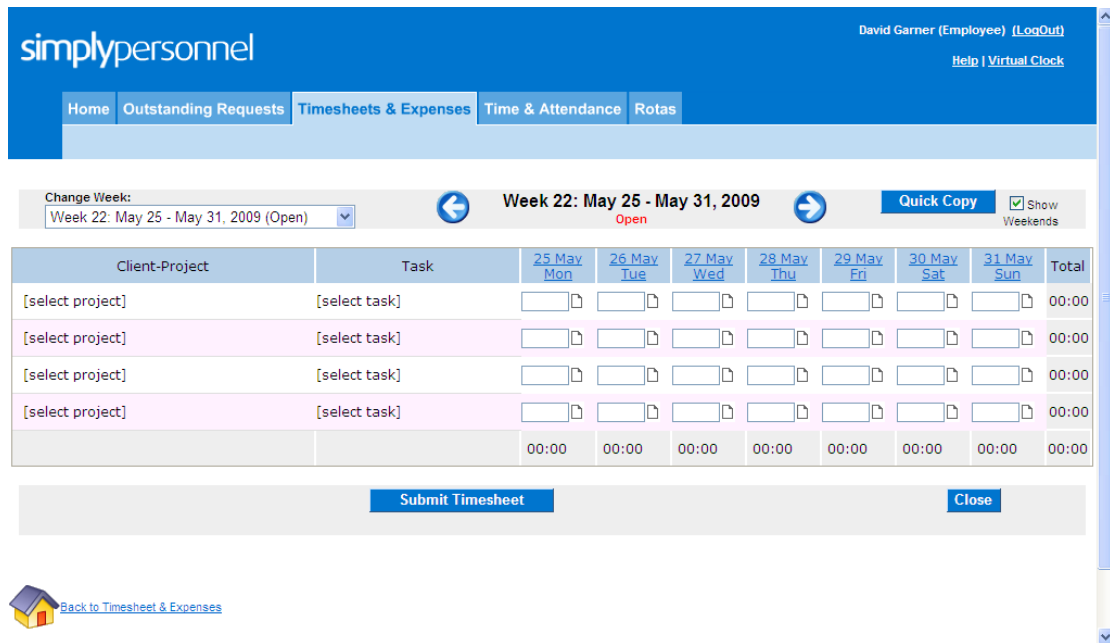
You can save your timesheet at any time and you can also save and close your timesheet and comeback to it at a later date to complete.

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.




simplypersonnel David Garner (Employee) (LogOut)
Help | Virtual Clock

Home Outstanding Requests **Timesheets & Expenses** Time & Attendance Rotas

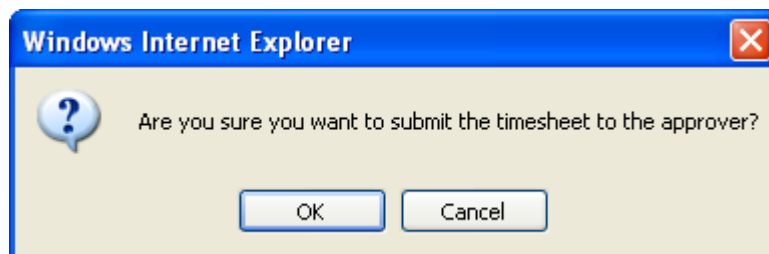
Change Week: Week 22: May 25 - May 31, 2009 (Open) ← Week 22: May 25 - May 31, 2009 → Quick Copy Show Weekends

Client-Project	Task	25 May Mon	26 May Tue	27 May Wed	28 May Thu	29 May Fri	30 May Sat	31 May 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

Submit Timesheet **Close**

 [Back to Timesheet & Expenses](#)


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).



Expense

Expense	
Expense Entry	Enter my expenses
My Expenses	Review all my expenses

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


Create New Expensesheet
✕

Expensesheet Title:*

Expensesheet Date: ▼

Allow Foreign Currency To Be Entered

Opening Mileage: ▲▼

Closing Mileage: ▲▼

Vehicle Registration:

Extra information:*

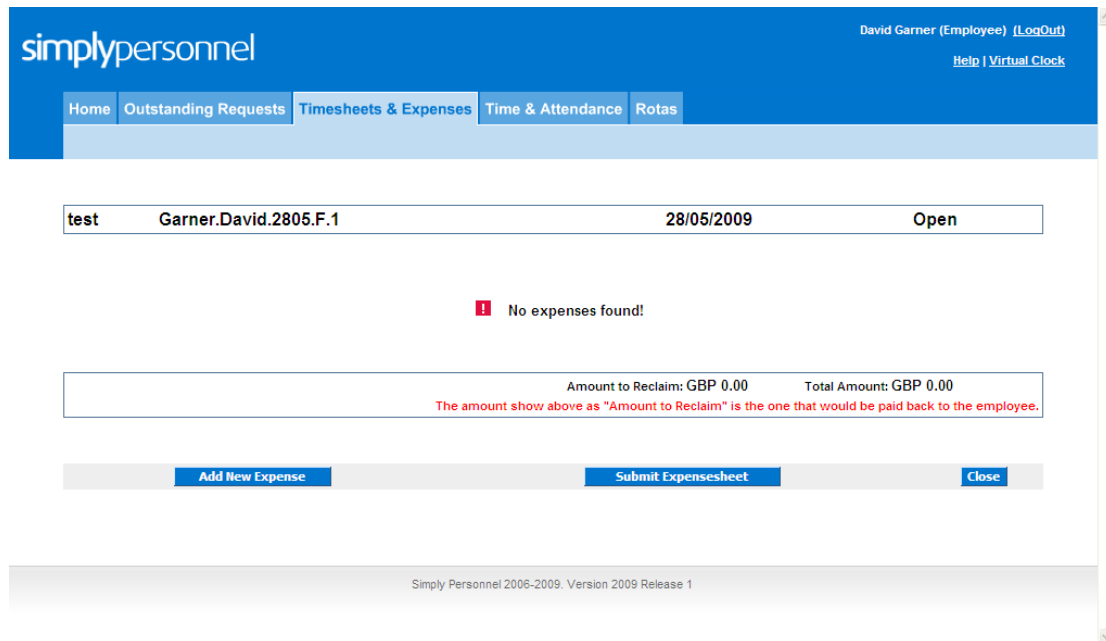
▲
▼

Add
Cancel

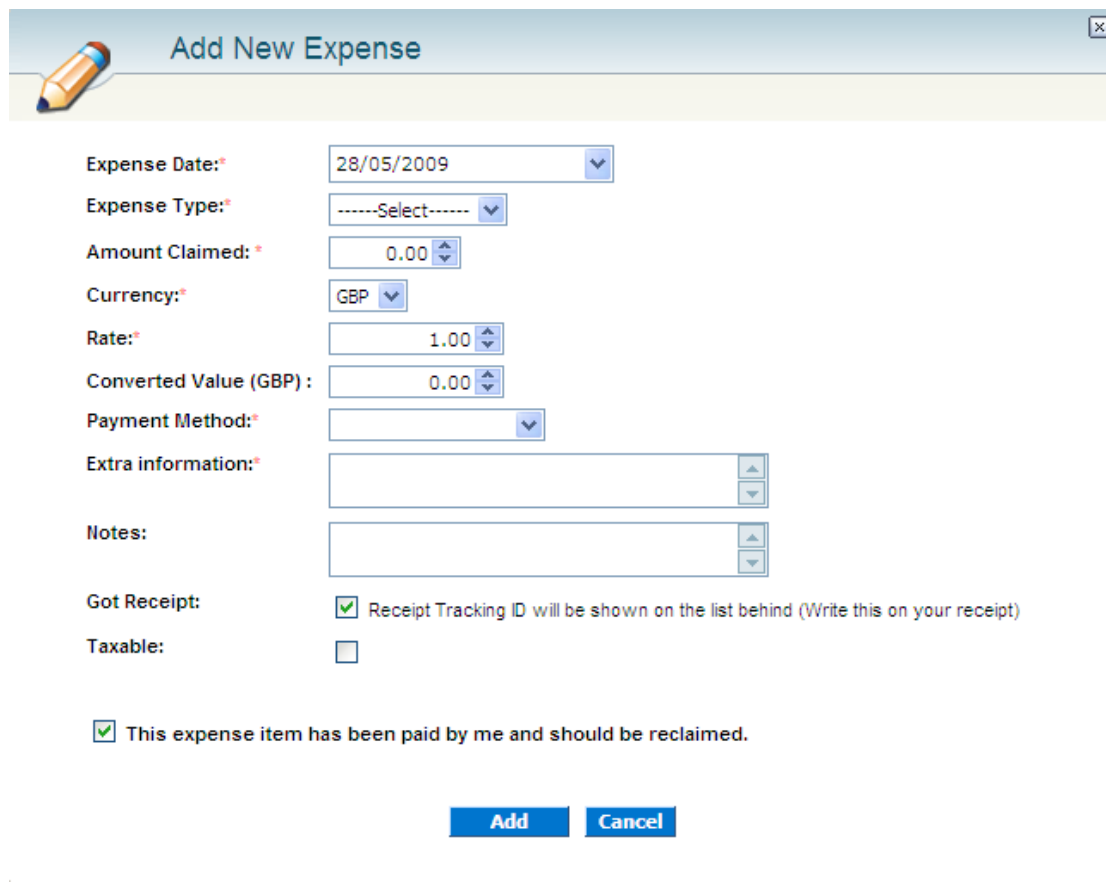
You are required to give the expense sheet a title (i.e the week commencing date) there are also option to add the mileage and vehicle registration (if the administrator has set it), also input extra information.

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.


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.

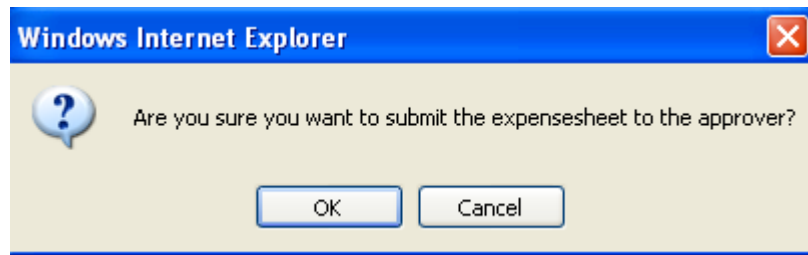
Add
Cancel

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:

Settings

Settings

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

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.