

Simply Personnel Time Sheets & Expenses

Manager User Guide

Simply Personnel: Timesheets & Expenses

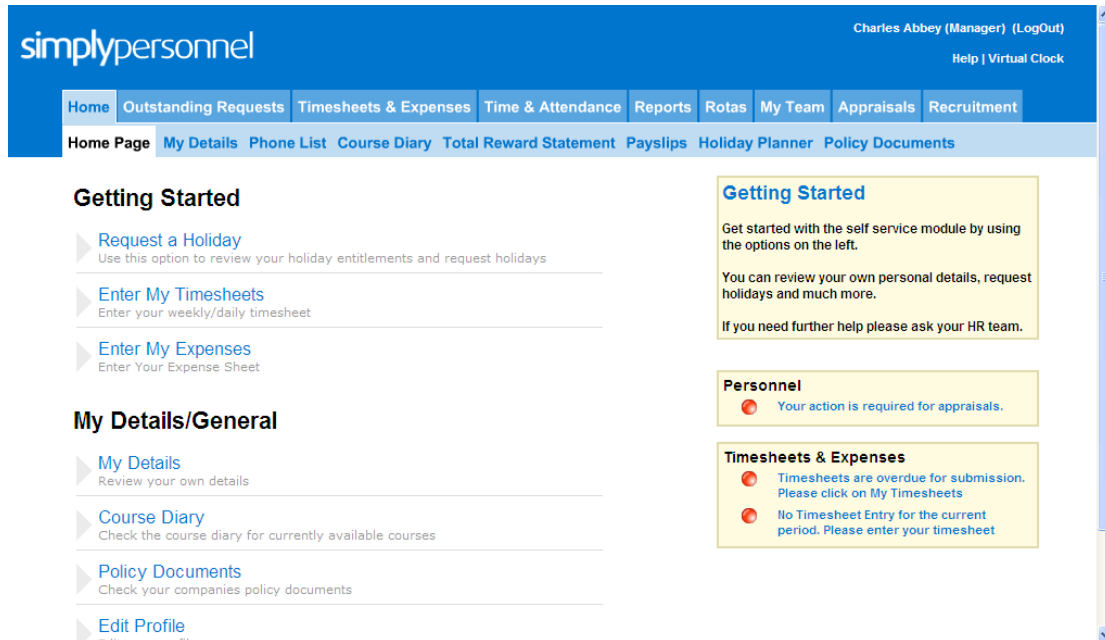
This document provides step-by-step guide for manager users to give an easy understanding on using the timesheets and expenses system within the self service module.

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.

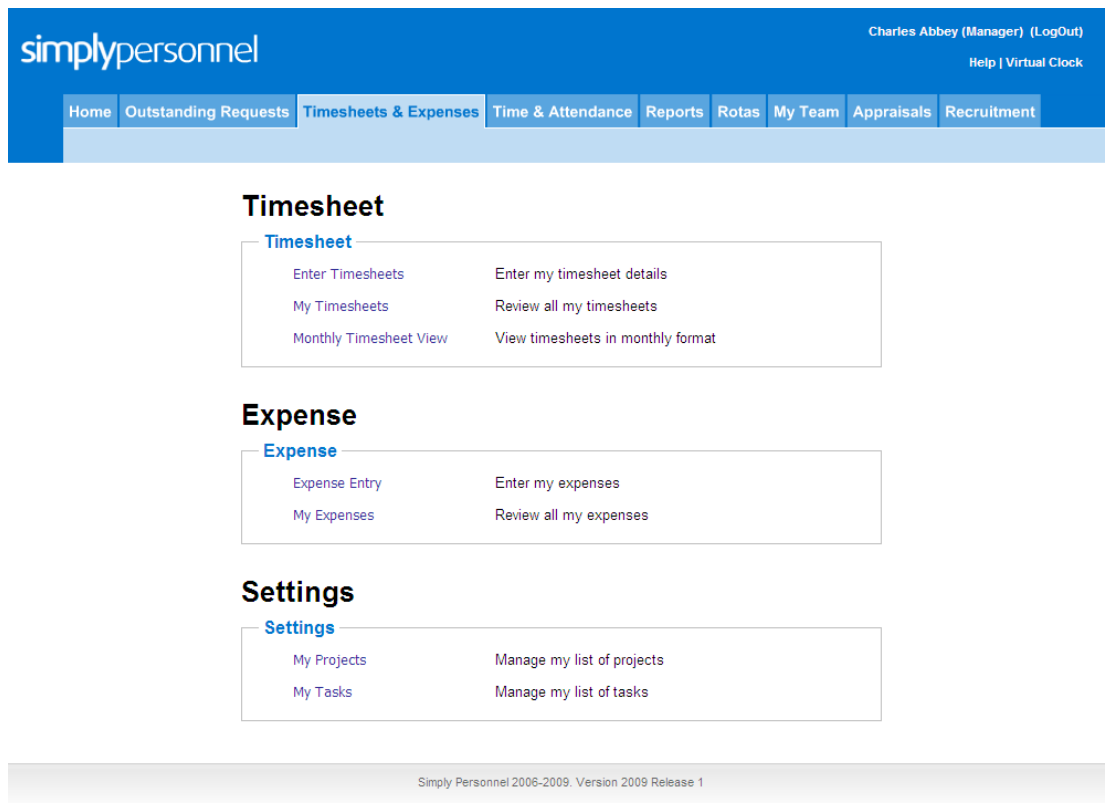


The dashboard features a blue header with the 'simplypersonnel' logo on the left and user information 'Charles Abbey (Manager) (LogOut)' and 'Help | Virtual Clock' on the right. Below the header is a navigation menu with tabs for Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, Reports, Rotas, My Team, Appraisals, and Recruitment. A secondary menu below it includes Home Page, My Details, Phone List, Course Diary, Total Reward Statement, Payslips, Holiday Planner, and Policy Documents.

The main content area is divided into several sections:

- Getting Started:** Includes links for 'Request a Holiday', 'Enter My Timesheets', and 'Enter My Expenses'.
- My Details/General:** Includes links for 'My Details', 'Course Diary', 'Policy Documents', and 'Edit Profile'.
- Getting Started (Yellow Box):** A callout box providing instructions on how to use the self-service module and where to find help.
- Personnel (Yellow Box):** A notification stating 'Your action is required for appraisals.'
- Timesheets & Expenses (Yellow Box):** Two notifications: 'Timesheets are overdue for submission. Please click on My Timesheets' and '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 'Timesheets & Expenses' section has a blue header with the 'simplypersonnel' logo and user information. The navigation menu is updated to highlight 'Timesheets & Expenses'.

The content is organized into three main sections:

- Timesheet:** A box containing three links: 'Enter Timesheets' (with sub-link 'Enter my timesheet details'), 'My Timesheets' (with sub-link 'Review all my timesheets'), and 'Monthly Timesheet View' (with sub-link 'View timesheets in monthly format').
- Expense:** A box containing two links: 'Expense Entry' (with sub-link 'Enter my expenses') and 'My Expenses' (with sub-link 'Review all my expenses').
- Settings:** A box containing two links: 'My Projects' (with sub-link 'Manage my list of projects') and 'My Tasks' (with sub-link 'Manage my list of tasks').

At the bottom of the page, a footer contains the text: 'Simply Personnel 2006-2009. Version 2009 Release 1'.

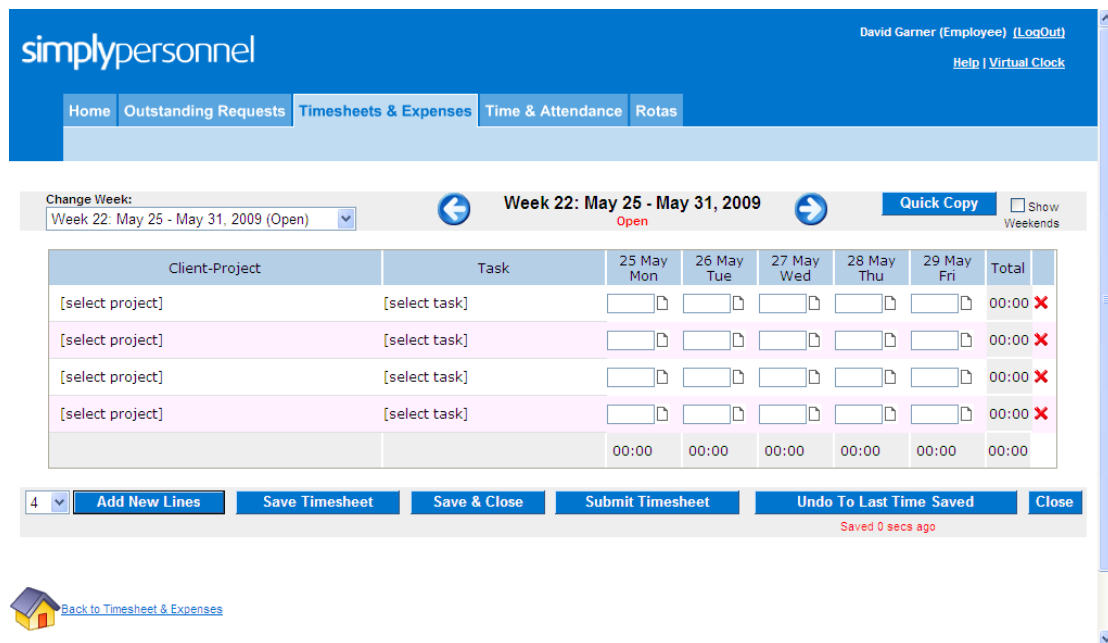
Timesheet

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.

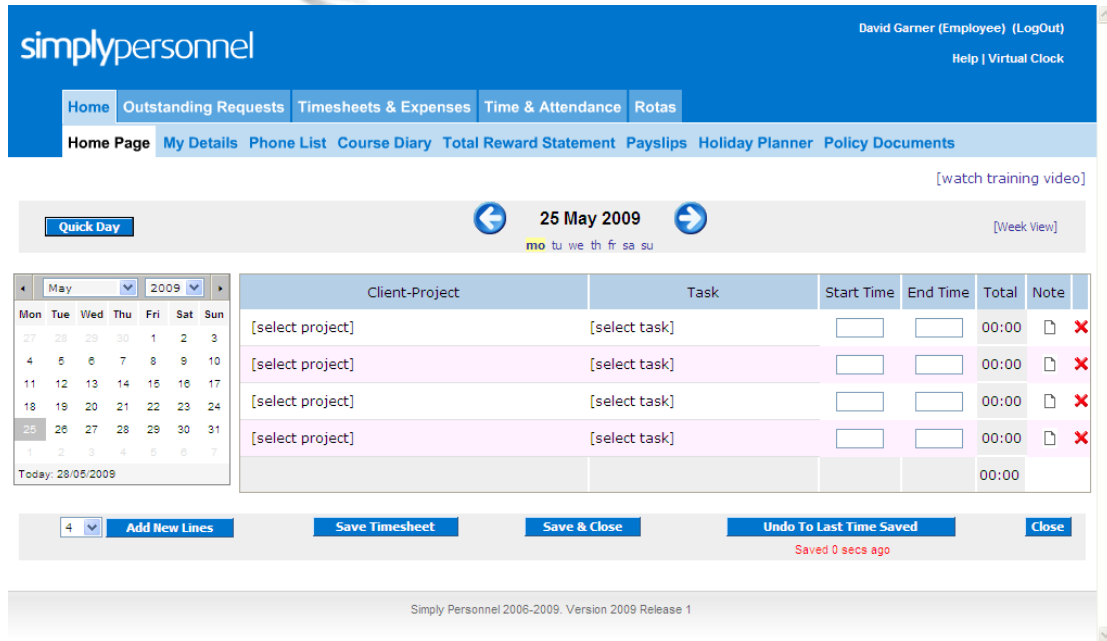


The screenshot shows the 'Enter Timesheets' interface in the simplypersonnel software. At the top, the user is identified as 'David Garner (Employee)' with a 'LogOut' link. The navigation menu includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses' (selected), 'Time & Attendance', and 'Rotas'.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

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, there are buttons for '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 also present.

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.

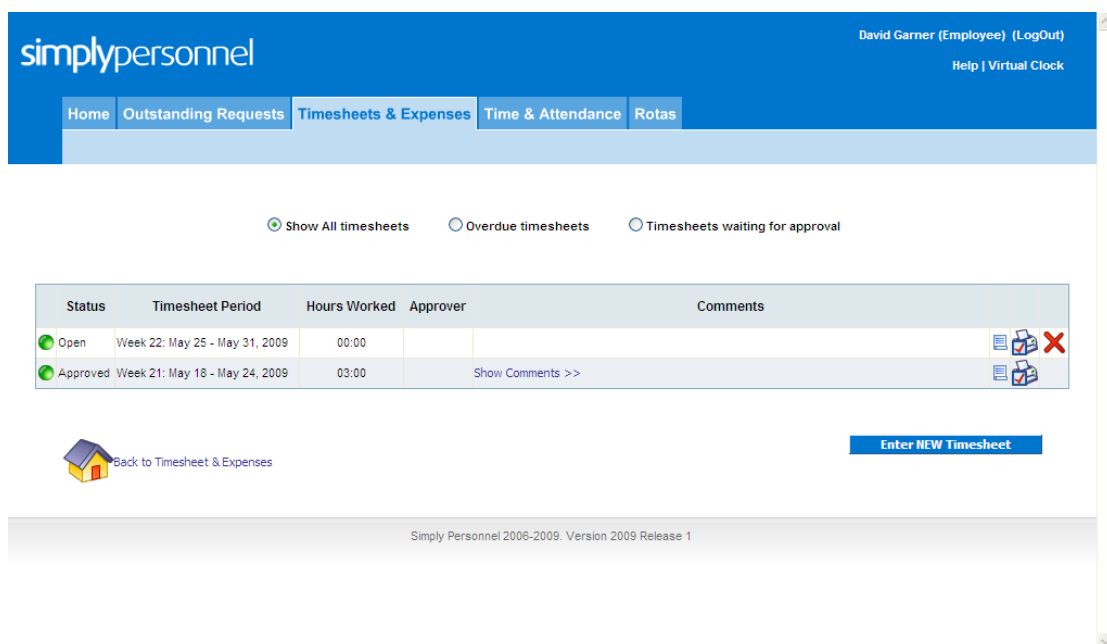


Once you have the correct date select a customer/project and a task/phase (these will have been set up by you administrator) then enter the start and end times that you have worked, the timesheet will total up the hours worked at the end of each column. You may also be required to enter notes. You can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

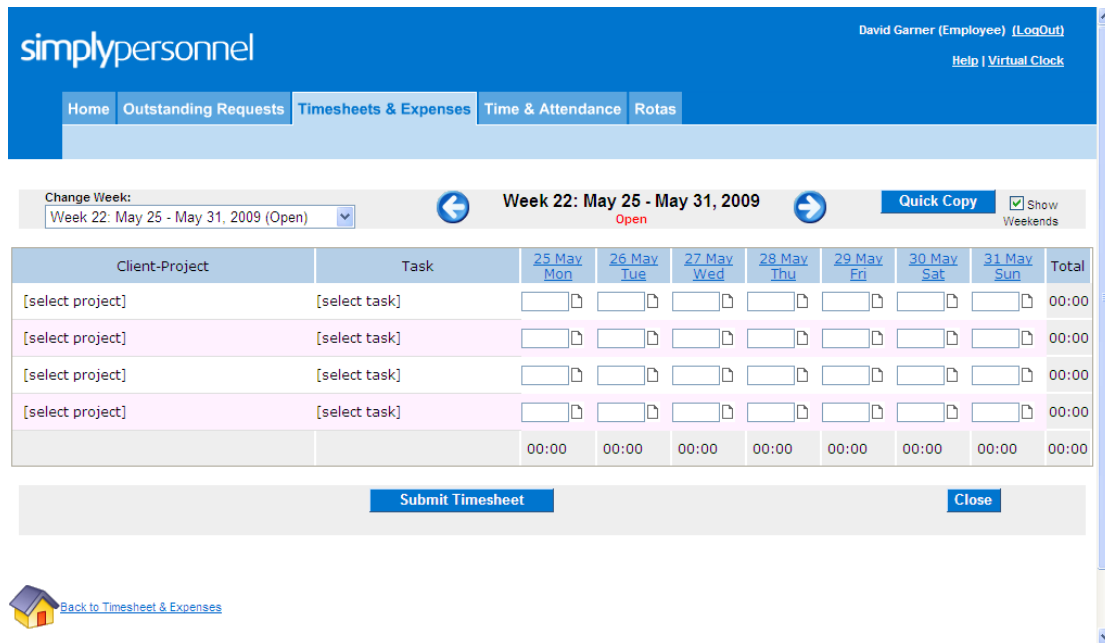
You can save your timesheet at any time and you can also save and close your timesheet and comeback to it at a later date to complete.

My Timesheets:

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



To submit a timesheet , select the timesheet you want and 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

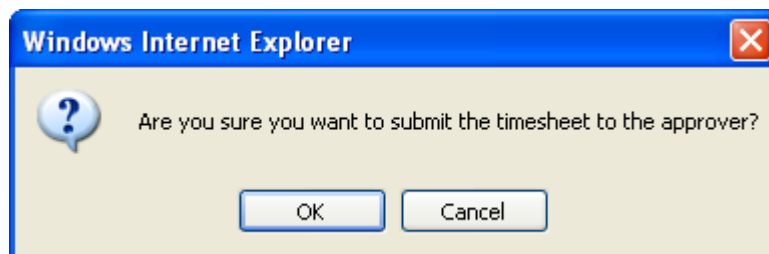
Change Week: Week 22: May 25 - May 31, 2009 (Open) ← Week 22: May 25 - May 31, 2009 → Quick Copy Show Weekends

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 your 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:*

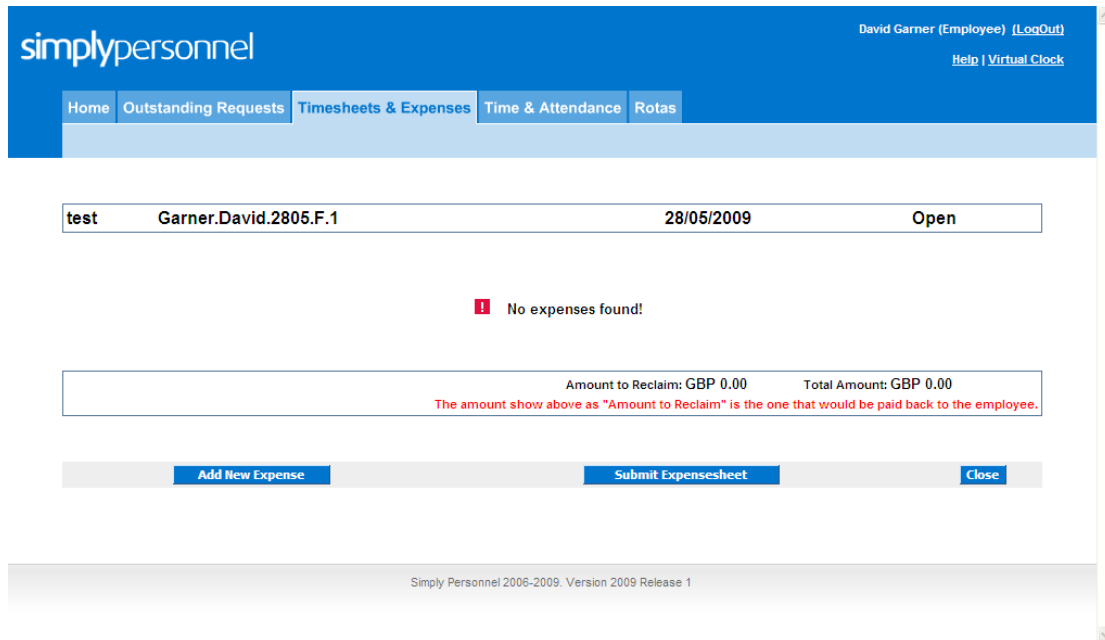
▲
▼

Add
Cancel

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



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

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

test	Garner.David.2805.F.1	28/05/2009	Open
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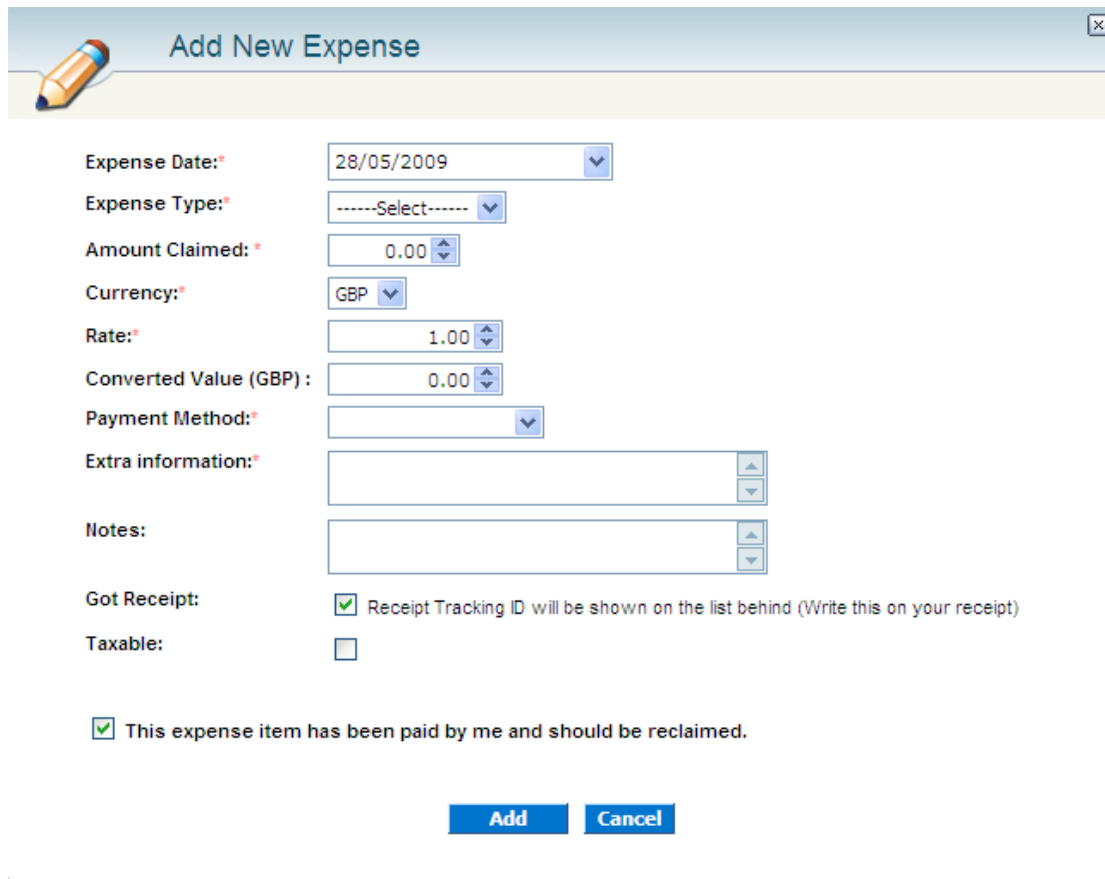
❗ No expenses found!


Amount to Reclaim: GBP 0.00 Total Amount: GBP 0.00
The amount show above as "Amount to Reclaim" is the one that would be paid back to the employee.

Add New Expense Submit Expensesheet Close

Simply Personnel 2006-2009. Version 2009 Release 1

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



 **Add New Expense** [X]

Expense Date:* 28/05/2009

Expense Type:* -----Select-----

Amount Claimed:* 0.00

Currency:* GBP

Rate:* 1.00

Converted Value (GBP) : 0.00

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 claimed.

Add Cancel

Fill in all of the mandatory fields, the expense types are predefined options that your administrator has already set up. If you have a receipt make sure the box is ticked 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 the '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:

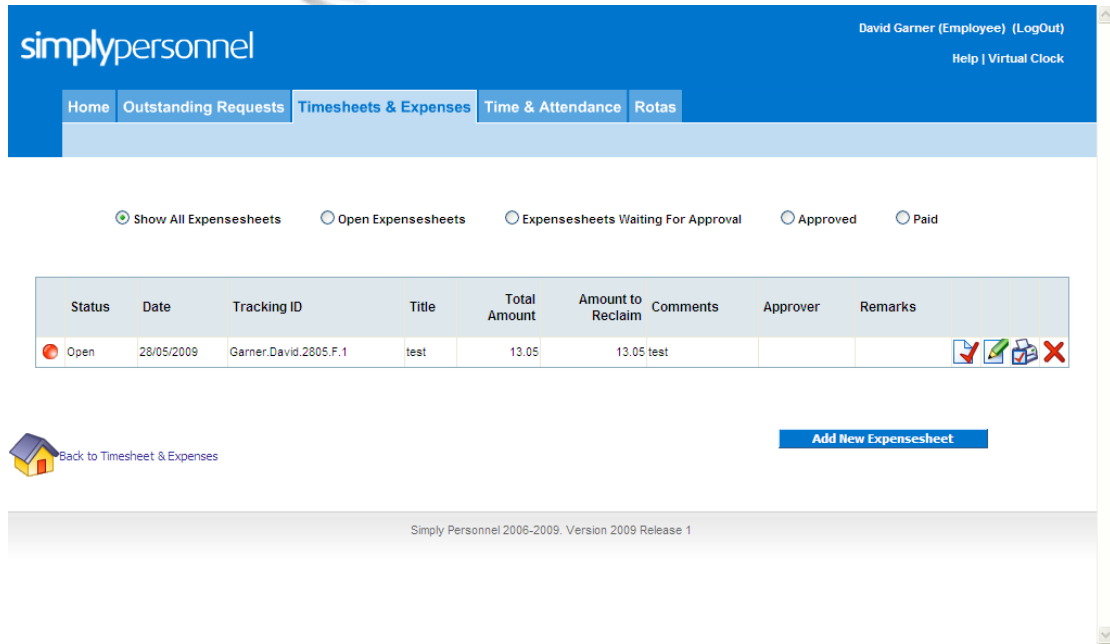
This expense item has been paid by me and should be reclaimed.

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.

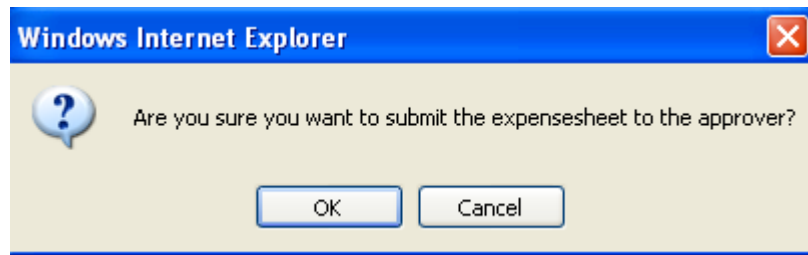
My Expenses:

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



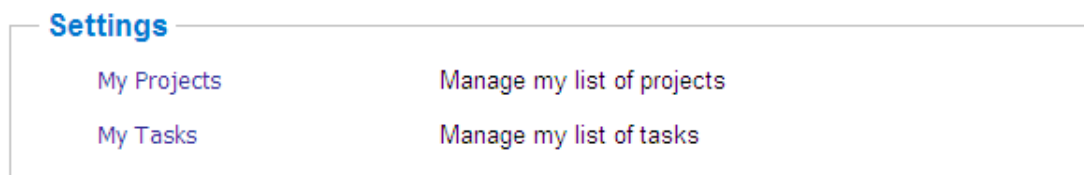
The screenshot shows the 'simplypersonnel' web application interface. At the top right, it displays 'David Garner (Employee) (LogOut)' and 'Help | Virtual Clock'. A navigation menu includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses' (which is active), 'Time & Attendance', and 'Rotas'. Below the menu, there are radio buttons for filtering expenses: 'Show All Expensesheets' (selected), 'Open Expensesheets', 'Expensesheets Waiting For Approval', 'Approved', and 'Paid'. A table lists expense entries with columns: Status, Date, Tracking ID, Title, Total Amount, Amount to Reclaim, Comments, Approver, and Remarks. One entry is visible: Status 'Open', Date '28/05/2009', Tracking ID 'Garner.David.2805.F.1', Title 'test', Total Amount '13.05', Amount to Reclaim '13.05', and Comments 'test'. Action icons (check, pencil, print, delete) are shown for this entry. A 'Back to Timesheet & Expenses' link and an 'Add New Expensesheet' button are also present. The footer text reads 'Simply Personnel 2006-2009. Version 2009 Release 1'.

To submit you 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



The screenshot shows the 'Settings' page. The title 'Settings' is highlighted in blue. Below it, there are two rows of 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.

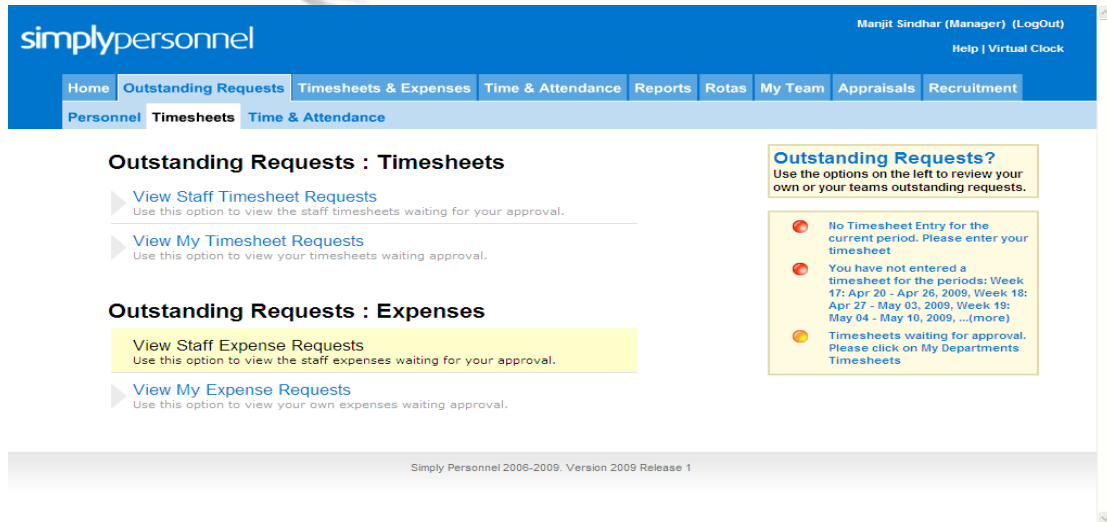
Outstanding Requests:

As a manager you may be required to approve submitted timesheets and expenses. If a member of your team submits a timesheet/ expense sheet there will be an alert at the bottom of the main dashboard as shown below.

Timesheets & Expenses

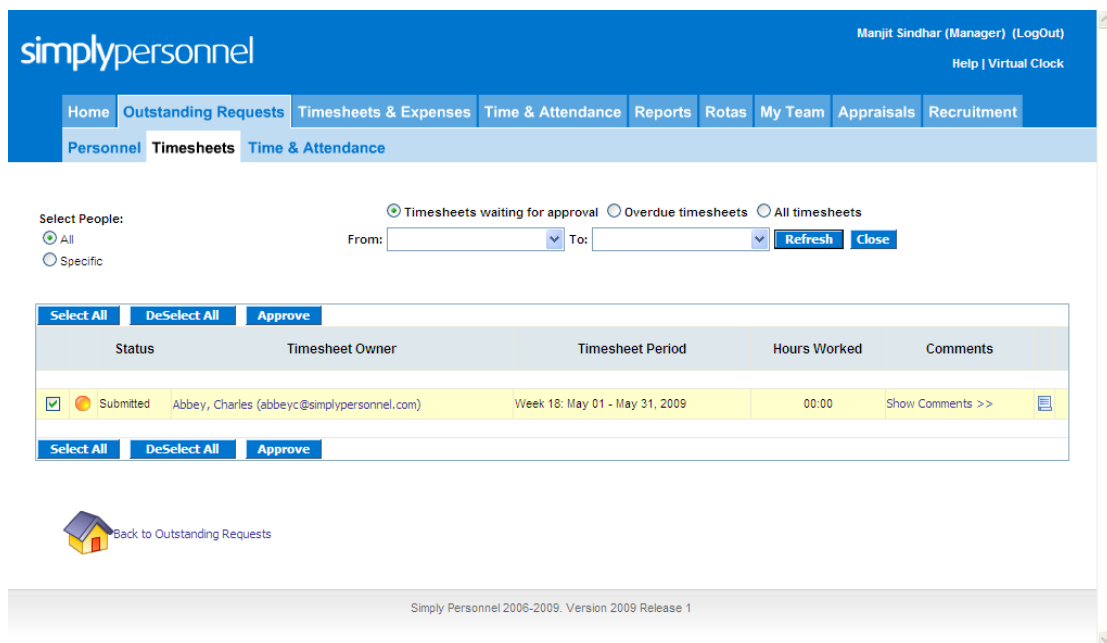
-  No Timesheet Entry for the current period. Please enter your timesheet
-  You have not entered a timesheet for the periods: Week 17: Apr 20 - Apr 26, 2009, Week 18: Apr 27 - May 03, 2009, Week 19: May 04 - May 10, 2009, ...(more)
-  Timesheets waiting for approval. Please click on My Departments Timesheets

Select the tab Outstanding Requests. You can then view your staffs timesheets and expenses.



The screenshot shows the 'simplypersonnel' web interface. The user is logged in as 'Manjit Sindhar (Manager)'. The navigation menu includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses', 'Time & Attendance', 'Reports', 'Rotas', 'My Team', 'Appraisals', and 'Recruitment'. The 'Outstanding Requests' section is active, showing options to 'View Staff Timesheet Requests' and 'View My Timesheet Requests'. A yellow box highlights 'View Staff Expense Requests' and 'View My Expense Requests'. A right-hand panel titled 'Outstanding Requests?' contains three red circular icons with error messages: 'No Timesheet Entry for the current period', 'You have not entered a timesheet for the periods: Week 17: Apr 20 - Apr 26, 2009; Week 18: Apr 27 - May 03, 2009; Week 19: May 04 - May 10, 2009, ... (more)', and 'Timesheets waiting for approval. Please click on My Departments Timesheets'. The footer indicates 'Simply Personnel 2006-2009. Version 2009 Release 1'.

Select the option you require. The window below shows a submitted timesheet entry but the expense option will show the same.



The screenshot shows the 'Submitted' timesheet entry view. The user is still logged in as 'Manjit Sindhar (Manager)'. The navigation menu is the same. The 'Timesheets' section is active, showing a table of timesheet entries. The table has columns for 'Status', 'Timesheet Owner', 'Timesheet Period', 'Hours Worked', and 'Comments'. A single entry is shown: 'Submitted' by 'Abbey, Charles (abbeyc@simplypersonnel.com)' for 'Week 18: May 01 - May 31, 2009' with '00:00' hours worked. There are buttons for 'Select All', 'DeSelect All', and 'Approve' above and below the table. A 'Back to Outstanding Requests' link is visible at the bottom left. The footer indicates 'Simply Personnel 2006-2009. Version 2009 Release 1'.

Click on the view icon at the left of the entry to look at all the information that the employee has entered.

To approve the time sheet click in the box next to the timesheet entry then click on Approve.



Easy To Use
Personnel, Training & Recruitment Software