



# How to Guide

Online Timesheets Portal - Timesheet Approver

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If you need help or have any questions, call 02 9435 0400 or email [support@finitigroup.zendesk.com](mailto:support@finitigroup.zendesk.com)

# GETTING STARTED

Please click on the link and enter the login and password provided in your welcome email.

You will then be prompted to enter and save your own password and directed to the home page.

Welcome to your online timesheet portal!



HOME

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HOME PAGE NAVIGATION

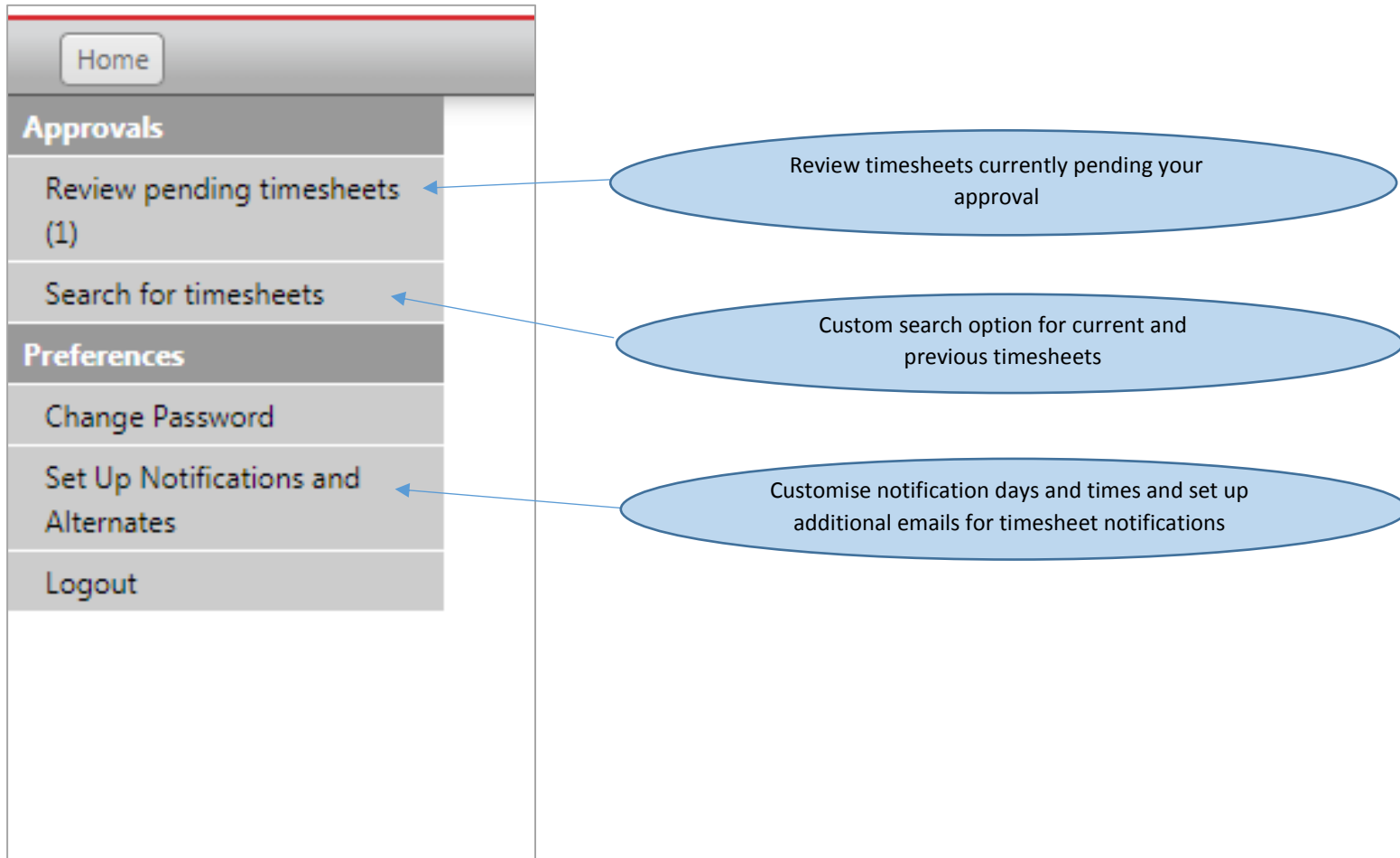
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# HOME PAGE NAVIGATION

The menu on the left provides quick navigation to review pending and to search for previous timesheets in addition to personalising the email notifications\*



\* Please note personalising the notifications does not override the standard system settings – see Notification Menu



# APPROVING TIMESHEETS

Select <review pending timesheets> from the Approvals Menu to open a list of pending timesheets.

Tick to select all or select individual timesheets

Click here to open a timesheet and review detailed entries

If there are multiple timesheets you can use search boxes to refine the list

Check the lines you wish to approve or reject and click the appropriate button at the bottom of the page.

Approve Reject Close

Customer:  Temp:  Search

<input type="checkbox"/> Select All	User ID	Temp Name	Qty	Amount or Qty		
<input type="checkbox"/>	Client Name: Jun 04 - Jun 10 - SCFX01A - Sarah Smith (HOUR)					
<input type="checkbox"/>	SCFXT01A	Smith, Sarah	18.00	105.00		

Approve Reject Close

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When approving timesheets, confirmation is required that the timesheet has been reviewed, the transactions are correct and related charges will be accepted.

**View Timesheet**

<b>Job</b>	SCFX01A - Sarah Smith
<b>Temporary</b>	Smith, Sarah (SCFXT01A)
<b>Date Range</b>	04/06/2018 - 10/06/2018
<b>Customer</b>	Client Name - Test Approver
<b>Submitted on</b>	Submitted by Smith, Sa

Approve Reject Export

Date	Pay Type
Mon, Jun 4	Normal Hours
Tue, Jun 5	Expenses
Tue, Jun 5	Normal Hours
Tue, Jun 5	Expenses

Approve Reject Export

Normal Hours:	18.00
Expenses:	105.00

Click to confirm and accept timesheet for approval




When rejecting a timesheet a reason must be entered. Once rejected, a notification email will be sent to the consultant who can then delete the timesheet or amend and resubmit.

**View Timesheet** ✕

<b>Job</b>	SCFX01A - Sarah Smith
<b>Temporary</b>	Smith, Sarah (SCFXT01A)
<b>Date Range</b>	04/06/2018 - 10/06/2018
<b>Customer</b>	Client Name - Test Approver
<b>Submitted on</b>	Submitted by Smith, Sarah (SCFXT01A) on 13/06/2018 6:04 PM
	<a href="#">Timecard History</a>

Approve Reject Export

 If you need any help, please call us on 02 9435 0400 or [support@finitegroup.zendesk.com](mailto:support@finitegroup.zendesk.com)

Date	Pay Type	Qty	Amount or Qty	In	Out	Lunch	Comments	Upload File	
Mon, Jun 4	Normal Hours	8.50	0.00	8:00am	5:00pm	0.50			PO No.: Default Rejection Reason: <input type="text"/>
Tue, Jun 5	Expenses	0.00	50.00			0.00	taxi to airport	Taxi rcpt.pdf	PO No.: Default Rejection Reason: <input type="text"/>
Tue, Jun 5	Normal Hours	9.50	0.00	8:00am	6:00pm	0.50			PO No.: Default Rejection Reason: <input type="text" value="enter 1 hr lunch"/>
Tue, Jun 5	Expenses	0.00	55.00			0.00	airport parking	Airport rcpt.pdf	PO No.: Default Rejection Reason: <input type="text"/>

Approve Reject Export

Normal Hours: 18.00  
Expenses: 105.00

Enter reason and click reject



You can also access a mobile friendly version of the portal to view and approve timesheets.

The screenshot shows a mobile interface for 'Pending Timesheets'. At the top is a teal header with a hamburger menu icon on the left, the title 'Pending Timesheets' in the center, and a vertical ellipsis menu icon on the right. Below the header is a list of timesheet entries. The first entry is highlighted with a light blue background and contains the following text: a checkbox, 'SCFXT01A - Smith, Sarah', '04/06 - 10/06', 'Client Name', '18.00 quantity', and 'Sarah Smith'. Four callout boxes with blue ovals and arrows point to specific UI elements: the top-left hamburger menu, the top-right vertical ellipsis menu, the checkbox, and the text 'SCFXT01A - Smith, Sarah'.

Click to open menu to approve and reject selected timesheets

Click to access preferences menu, access desktop version or log out

Click on timesheet line to open a timesheet a view details

Tick to select a timesheet

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# TIMESHEET REPORTING

The <search for timesheets> menu can be used to search and list timesheets by type, from a range of dates, and by PO number.

The screenshot shows the search and reporting interface for timesheets. Three callouts provide instructions:

- Enter / select search criteria and click search to return results:** Points to the search filters and the Search button.
- Click export to download an excel summary of the search data:** Points to the Export button.
- Click on any column header to sort data by that field:** Points to the column headers in the table below.

**Search Criteria:**

- Timesheets to show:  Open,  Submitted,  Approved,  Rejected
- Date Range: From: [ ] to: [ ]
- Radio buttons:  Current Timesheets,  Archived Timesheets
- (UDF) Search PO No. [ ] for [ ]
- Buttons: Search, Done, Export

**Table:**

Drag a column header here to group by that column

	Job ID	Job Desc	Customer ID	Customer	ApproverID	Approver	Customer Approver ID	Customer Approver	User ID	Temporary	Start Date	End Date	Status	Approved Time	Unapproved Time
<a href="#">View</a>	SCFX01A	Sarah Smith	10306	Client Name			APPR01	Test Approver	SCFXT01A	Smith, Sarah	11/06/2018	17/06/2018	Open	0.00	41.00
<a href="#">View</a>	SCFX01A	Sarah Smith	10306	Client Name			APPR01	Test Approver	SCFXT01A	Smith, Sarah	04/06/2018	10/06/2018	Submitted	0.00	18.00

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# NOTIFICATION MENU

This menu is used to customise how and when you receive notifications for timesheets pending approval.

**Approver:** APPR01 - Test Approver

- Send notifications to my email addresses
- Keep sending me repeat notifications until I've processed all timesheets

Enter up to three email address to send notifications to:

Choose the times you wish to be notified:

Select All

	M	T	W	T	F	S	S
12a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12p	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alternate Approver:**

- Copy all notification emails to alternate approver
- Notify alternate after  Qty
- Do not notify alternate approvers by email

Enter up to two email addresses to send alternate notifications to:

**NB** Email addresses you enter here will not receive logins for the web portal- they will only receive the timesheet approval email and can only approve timesheets directly within this notification email

Add additional email addresses to email notifications

Select days and times for email notifications

**NB** Alternate approvers selected from the drop down list will receive logins for the web portal- they will also receive timesheet approval emails and can approve timesheets directly from this. If the person you require is not on the list – please contact us.

Default notifications are sent:

1. Monday 4pm
2. Tuesday 10am