



Administrator User Guide

TeamKeeper
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Introduction

TeamKeeper strives to provide the easiest to use time and attendance system for both management and employees. This user guide will explore features Administrators will have access to and how to do everything necessary to keep your TeamKeeper site up and running. Administrator is just one role inside of TeamKeeper so you might have it in addition to other roles like Employee or Accountant.

Since TeamKeeper is used across all industries in almost every part of the world, we have features on each site that may not be utilized by every company. This guide will show all of the features available but they may not be enabled for your TeamKeeper site. If you have any questions, please contact your supervisor or Technical Support.

Everything an Administrator needs to know will be covered in this document but there are several Quick Guides that are also available for reference on the TeamKeeper resources website. They are:

- New Employee Setup
- Email Notifications
- Standard Reports

A TeamKeeper timesheet contains 5 different fields that you can use when tracking time. The default field headings can all be customized to meet the terminology of your company so what is listed below may not match your live site. If these fields are modified, the labels on the timesheet and management pages will also be changed. The standard fields are as follows:

- Group
- Charge Code
- Pay Type
- Organization
- Task#

Requirements

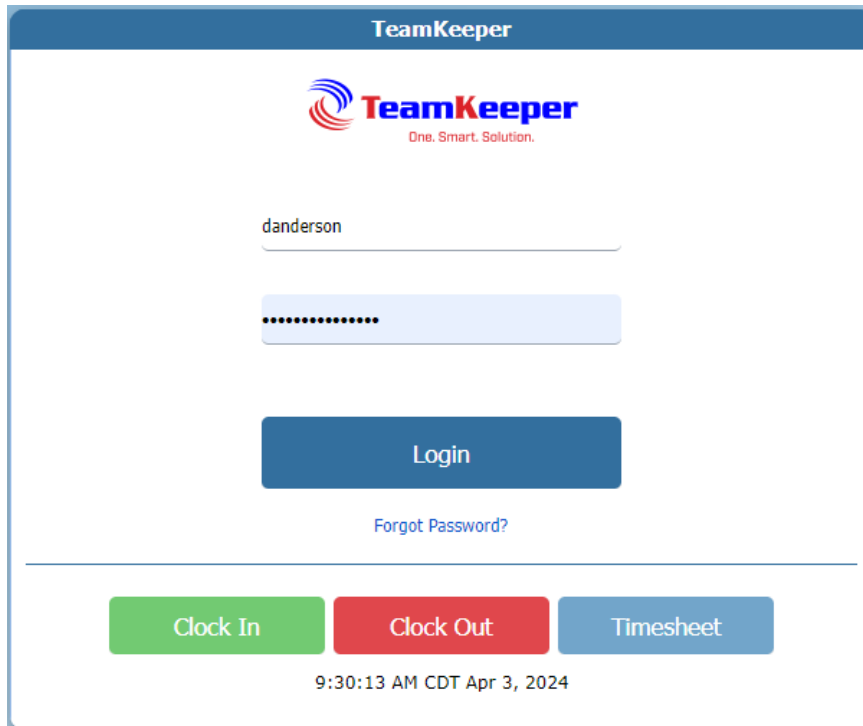
The following is required to access the electronic timesheet system:

- Current Internet Browser
 - Microsoft Edge
 - Mozilla Firefox
 - Chrome
 - Safari


- Internet Access
- Valid Username and Password

For administrator access, you must login (using the webclock feature will not give you the access necessary).

1. Open an internet browser and navigate to your company's site
2. Enter your username and password
3. Select the "Login" button (shown below in the red box)



TeamKeeper

 **TeamKeeper**
One. Smart. Solution.

danderson

.....

Login

[Forgot Password?](#)

Clock In Clock Out Timesheet

9:30:13 AM CDT Apr 3, 2024

Administrator vs AdManager

The Administrator role can be given to a user without any additional steps required. Administrators will be able to view any employee profile or timesheet and manage any groups. However, the AdManager role requires a user to be assigned over at least one group. It does not matter if you assign the AdManager role to the user then go to Group Management and assign the user over the group or if you just assign the user as an Admin Manager over the group.

Admin Managers are restricted to not only the employees they can view but also the links they will have from the Administrator drop down.

 ADMINISTRATOR MENU AND PERMISSIONS

	Administrator	Admin Manager
Employee Management	X	X
Group Management	X	X
Reports	X	X
Import Employees	X	
Client Management	X	X
Audit Item Log	X	
Notifications	X	
Company Documents	X	
Document Category	X	
Document List	X	

Homepage

When you first log in, you will be directed to a homepage with the menu items in the blue bar at the top. The items you see will be based on the roles and permissions you have been given inside TeamKeeper.

Email notifications will be listed at the top and can be removed as needed. Beneath the notifications, there will be the dashboard. You may have different VUE's based on your assigned roles but the administrator role comes with the Administrator VUE which shows active users and processed timesheets at a glance. There is a news feed section below the dashboard where your administrators can post any reminders or memos that employees need to see. If your company is not using email notifications or the news feed, the page will be blank below the red menu bars.

The role of administrator has a great added tool so that you can quickly move to an employee's information. On the right side of the page, there is a search box with a dropdown that will let you select Profile or Timesheet then start typing the employee's name. As an administrator you will not be able to approve an employee's timesheet unless you have additional roles assigned to you.

Administrator Menu Items

Employee Management – Allows you to create new or terminate users as well as manage the codes allowed on their timesheet and the permission they have on the site.

Group Management – Group categorization is useful for timesheet approvals or charge code assignment. Supervisors assigned over a group will be allowed to view, edit and approve their employees' timesheets as well as leave requests.

Reports – Each TeamKeeper site comes with a set of standard reports that can be accessed by Administrators, Admin Manager or Reporter.

Import Employees – New employees profiles can be created from Employee Management however, there are times that importing a large file new users just makes more sense.

Client Management – Clients are users that need to view, approve and print timesheets for certain employees or project codes. They are a very limited user profile.

Audit Item Log – These records allow you to view any changes that happened in a specified time range.

Notifications – Email notifications can be activated and configured from this link. These notices can also be posted to the front page of the site so users are reminded again when they login.

Company Documents – Administrators have the ability to add documents to the site for employees to view and print.

Employee Management

Administrators will be using Employee Management to:

- Create new employee profiles – creating a new TeamKeeper user
- Terminate current user
- Reactivate a terminated user
- Update current user including profile information, group/manager assignment, charge codes assignments, task assignment and roles

New Employee Setup

Before an employee can login to the website or create a timesheet, an Administrator must create their profile. Follow the steps below to get the new employee completely setup.

- Create new employee's profile
- Assign to Group(s)
- Assign Authorized Charge(s)
- [Optional] Assign to Class
- [Optional] Assign Task(s)
- [Optional] Update Roles
- [Optional] Assign to Leave Classes
- [Optional] Add to Holiday Schedule
- [Optional] Add to Leave Prepopulation

1. To create a new user, there are 2 options.
 - a. Go to Administrator > Employee Management (best use if only creating one user)
 - i. Enter data in the required fields and any additional fields your company uses on the "Profile" tab.
 - b. Administrator > Import Employees (best use if creating multiple users)

- i. On the import page, click the white box with a blue question mark on the right side of the page. Once the page loads, a link to download the .CSV file will be at the bottom of the page. Fill in the required fields and save as a .CSV. Go back to the import page and browse for the file.
2. To assign a user to groups there are 2 options. **Remember: an employee needs to be in a group to have access to their charge codes but does not have to be assigned all the charge codes available.**
 - a. Administrator > Employee Management > Group Tab (best use if assigning to multiple groups)
 - i. When the employees name is selected in the list on the left panel, their name will appear in box on the right hand side of the screen “Assign Employee to Groups”. By clicking in the box by “To:” you will be able to select multiple groups. Select the start date and end date (if applicable).
 - b. Accounting > Group Management > Employees Tab (best use if assigning to only one group)
 - i. Click on the group name in the panel on the left side of the screen. Choose the employee tab at the top. In the box “Assign Employees to Group” click in the box for “Assign:” and select all employees that need to be assigned. Select the start date and end date (if applicable).
3. To assign authorized charges (charge code/pay type combinations) there are 2 options.
 - a. Administrator > Employee Management > Authorized Charges Tab (best use if assigning few authorized charges)
 - i. Under the column headers on the Authorized Charges page, there is a line that says “*New*”. Click in that area under group to select groups from the drop down. Do the same for charge code, pay type, org and start date. End date and all other information is optional. Hit save at the bottom of the page.
 - b. Accounting > Group Management > Authorized Charges Tab (best use if assigning many authorized charges)
 - i. Select the group name on the left hand panel. On the Authorized Charges tab use the check boxes to select which charge code/pay type combinations are needed. In the box “Assign Auth Charge to Employees” on the bottom right, the selected charge codes will appear then the employees name can be selected from the “To:” box.
4. [Optional] To assign the employee to a class, there are 2 options.
 - a. Administrator > Employee Management > Class

- i. Right hand side “Assign Employee to Class” choose all the applicable class(es).
 - ii. If exporting to QuickBooks, employees can only be assigned to one class at a time.
 - b. Accounting > Class Management
 - i. Select the class from the left side of the page. In the middle bottom section “Assign Employees to Class” choose the employees name, add start date and end date (optional) then click “Assign”.
 - ii. If exporting to QuickBooks, employees can only be assigned to one class at a time.
5. [Optional] To assign tasks there are 2 options.
 - a. Administrator > Employee Management > Task (best use if assigning many tasks)
 - i. Right hand side “Assign Tasks to Employees” choose all the tasks applicable.
 - ii. If these tasks are dependent on the group association you must choose the employee from that group (not View All) on the left side of the page. Choose the tasks then check the box “Include Groups in Associations”. This will limit how the sees that task.
 - b. Accounting > Task Management (best use if assigning few tasks)
 - i. Select the task from the left side of the page. In the middle bottom section “Assign Tasks to Employees” choose the employees name, add start date and end date (optional) then click “Assign”.
 - ii. If these tasks are dependent on the group association you must choose the employee from the group (not View All). Choose the tasks then check the box “Include Groups in Associations”. This will limit how employee uses the task on the timesheet.
6. [Optional] Update Roles
 - a. Administrator > Employee Management > Roles
 - i. When a user profile is created, they are automatically given the Employee role. Based on what actions this user will be doing, they might need more roles which would allow more permission.
 - ii. When the employee’s name is selected from Employee Management, click the “Roles” tab after “Task”. Under the current assigned roles, there is a line to click to add a new role. After selecting the needed role(s), click “Save” at the bottom. If you need to delete a role, click the box beside the role and “Delete” at the bottom.
 - b. Role Explanation and Usage

- i. **Accounting** – Accounting users can import employee and timesheet data and export completed timesheets to payroll or accounting. Users are also able to manage charge codes, pay types, tasks, classes, business rules and leave. This role can be assign to any employees no matter their other roles however if you are an Accounting Manager over a group, you will only be allowed to view the information for the employees in that group.
- ii. **AdManager** – has a similar visibility as Admin, however, they can only manage employees, groups and clients or run reports.
- iii. **Admin** – Administrators can manage employees, groups and clients, configure the email notifications, run reports and upload company documents. This role can be assign to any employees no matter their other roles however having this role and AdManager role will reduce some of the functions to the more restricted role.
- iv. **Client** – allows the user to review, print and approve timesheets. User only has the Timesheet Review link and will only be able to see hours worked on the timesheet that are authorized charges in the group they are over. This role is intended for 3rd party customer users who have a need to review and approve hours worked.
- v. **Employee** – provides the timesheet as well as access to view leave balances, schedule, leave requests, electronic pay stubs, W2's and password control. This is the default role for a user. It can be removed if another role is added. For example, an Accountant might need access to the payroll import but does not need to create a timesheet.
- vi. **HumanResource** – Manage employees, benefits, unions, security clearance, company titles, EEOC categories, contract titles and compensation descriptions. HR Manager is restricted to seeing the employees and receiving the notifications only for the employees in that group. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
- vii. **News Editor** – allows the user to add or update information placed on the home page. Messages can include links to other web pages, text, and/or html. Once added, news is viewable to all users that login to the system.
- viii. **Reporter** – allows anyone with this role to view and export the standard system reports. This role can be added on to any other role in the system. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
- ix. **Scheduler** – This role provides the capability to create a calendar schedule for employees including breaks or comments for what the employee is expected to complete. Reports are available that can display scheduled time versus actual time. Holiday schedules and prepopulation can be managed from this role as well. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
- x. **Supervisor** – has the authority to open, edit and ultimately approve the timesheets of employees. Supervisor roles also can import schedules, manage employee leave requests and mass update timesheets (both in/outs or hours

worked). In addition, supervisors can assign projects/jobs to employees and see employee contact information. Supervisors will only get notifications for employees in their groups. This role can be assign along with any other roles however if you are a Timekeeper as well, your permissions will be restricted to that of the Timekeeper and you will not be able to approve timesheets. If they are assigned over a group, they will only see the data relating to that group – not the entire site.

- xi. **Timekeeper** – has the same authority as supervisor, however, they cannot approve any timesheets. Timekeepers will only get notifications for employees in their groups.

7. [Optional] To assign the employee to Leave Management classes, there are 2 options.

a. Accounting > Leave Management > Employee Setup

- i. Choose the new employees group and then select their name. Click “Add Leave to List”. Choose the Leave and Class for each type of leave the new employee needs. For a flat type of leave (like Holiday), you will want to add a beginning balance so they have a bank to draw from for the rest of the year.

b. Accounting > Import | Export > Leave Balance

- i. Download the import file template by clicking the white box with a blue question mark on the right side of the screen. Save the .csv file then open and edit the file. For each type of leave, there will be 1 row. Optional fields include: beginning, accrued, taken, lost and paid however if there is a balance to be given to the employee, at least one of those fields needs to be populated. After saving the file, go back to the import page and upload the file.

8. [Optional] Add to Holiday Schedule

a. Scheduling > Holiday Schedules

b. On the left side under “Holiday Management” choose the holiday schedule for the new employee

c. On the right side under “Assign Employees to Holiday Schedule” choose the employee and “Assign”

9. [Optional] Add to Timesheet Prepopulation

a. Scheduling > Timesheet Prepopulation

b. Select the scheme name needed (usually just one but there might be more) and “Assign to Employee”

c. Select the group and “Show Assigned Employees”

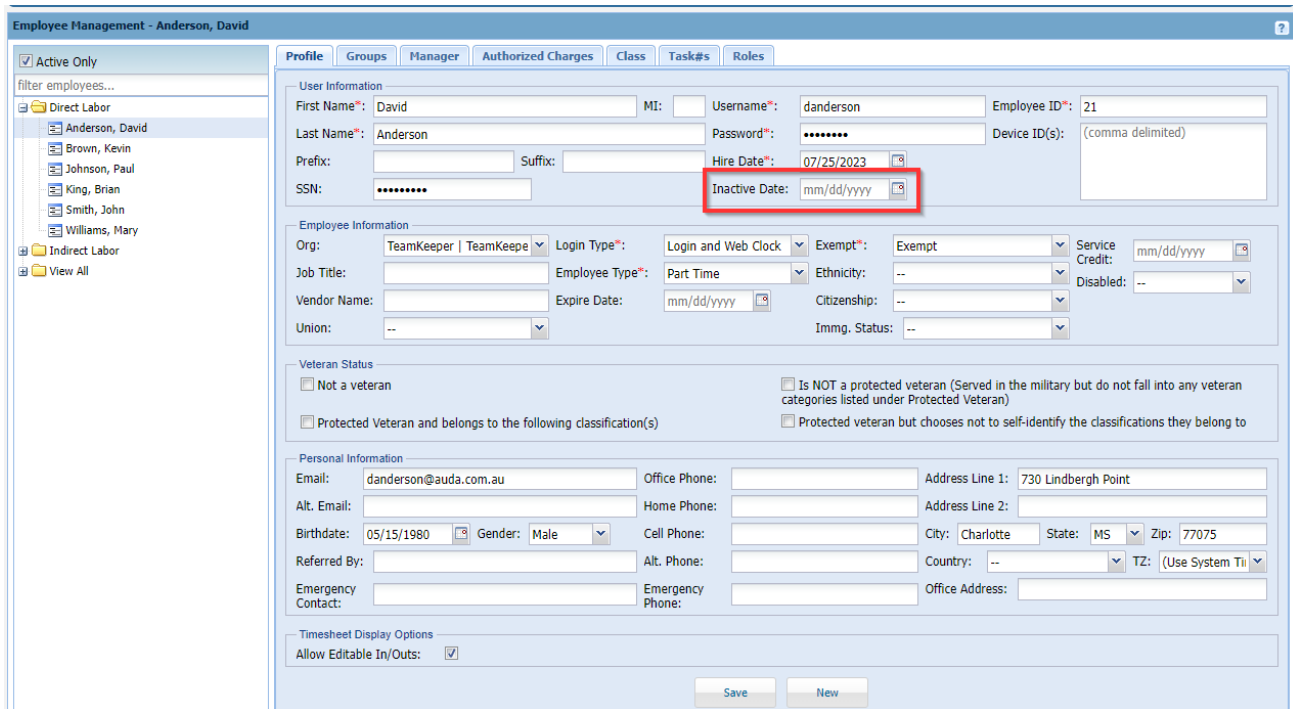
d. From Employee Options, choose the arrow on the right of the box and select the new employee

e. Click “Save Changes to Selected Employees” at the bottom of the page

Terminate Current User

To end a user’s access to the site, locate their profile from Employee Management by opening the group or using the search box to filter for the employee’s name. Administrators can also use the search box at the right side of any page on the site.

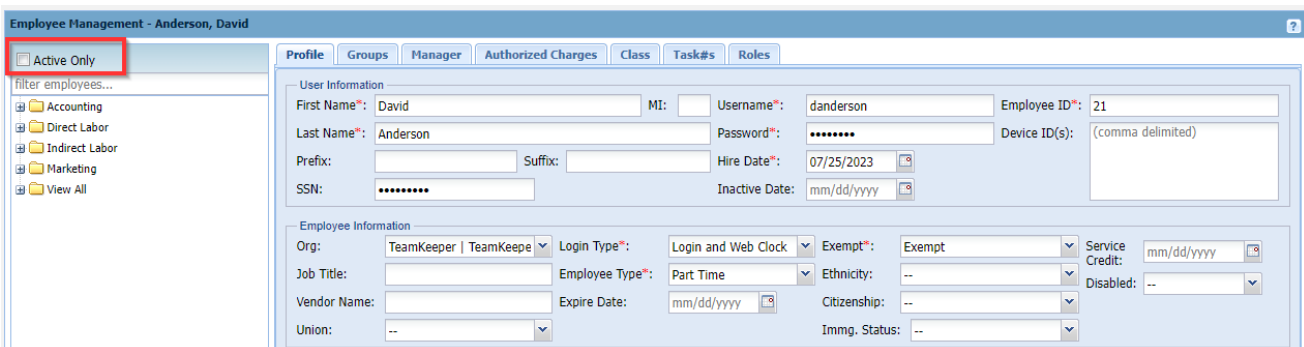
After locating the employee and selecting their name, their profile information will load. Under the Hire Date field, there is a blank box for Inactive Date. Once the date is selected and the profile is saved, the user will no longer be able to login to the site but administrators and supervisors will always be able to view historical data or export timesheets for payroll.



The screenshot shows the 'Employee Management - Anderson, David' profile page. The 'User Information' section includes fields for First Name (David), Last Name (Anderson), Username (danderson), Employee ID (21), Password, and Hire Date (07/25/2023). The 'Inactive Date' field is currently empty and is highlighted with a red box. Below this, the 'Employee Information' section contains dropdown menus for Org (TeamKeeper | TeamKepe), Login Type (Login and Web Clock), Exempt (Exempt), Job Title, Employee Type (Part Time), Ethnicity, Vendor Name, Expire Date, Citizenship, and Immig. Status. The 'Veteran Status' section has checkboxes for 'Not a veteran' and 'Protected Veteran and belongs to the following classification(s)'. The 'Personal Information' section includes Email (danderson@auda.com.au), Office Phone, Home Phone, Cell Phone, Address Line 1 (730 Lindbergh Point), Address Line 2, Birthdate (05/15/1980), Gender (Male), City (Charlotte), State (MS), Zip (77075), Referred By, Alt. Phone, Country, TZ, Emergency Contact, and Office Address. At the bottom, there is a 'Timesheet Display Options' section with a checked 'Allow Editable In/Outs' checkbox and 'Save' and 'New' buttons.

Reactivate a Terminated User

Once a user is inactivated, their profile will not appear from Employee Management if you open the group or search for their name. To find an inactive profile, uncheck the box “Active Only” and use the filter employees... field to search for their name.



The screenshot shows the 'Employee Management - Anderson, David' profile page. The 'Active Only' checkbox in the top left corner is unchecked and highlighted with a red box. The 'Inactive Date' field is now populated with 'mm/dd/yyyy'. The rest of the form content is identical to the previous screenshot, showing the 'User Information', 'Employee Information', 'Veteran Status', and 'Personal Information' sections.

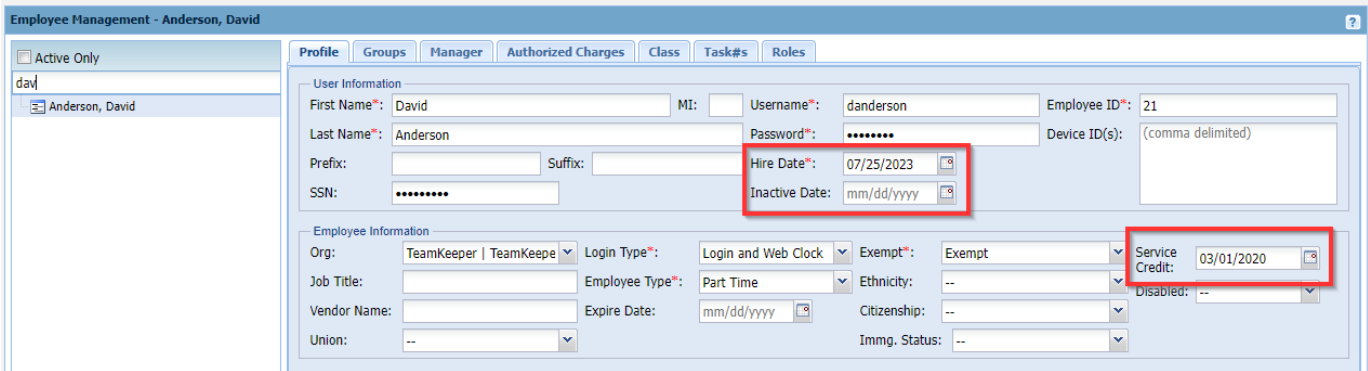
Once their profile is located, remove their inactive date and change their hire date to a day after the inactive date. For example:

Original hire date – March 1, 2020

Inactive date – January 22, 2022

New hire date – July 25, 2023

If you try to make the new hire date the same or before the inactive date, you will receive an error message and the profile will not save. If an employee will be receiving recognition for the original hire date, enter the date into the Service Credit field. It will preserve their information and their leave accruals will use that date instead of the new hire date.



The screenshot shows the 'Employee Management - Anderson, David' interface. The 'User Information' section includes fields for First Name (David), Last Name (Anderson), Username (danderson), Employee ID (21), Password (masked), and Inactive Date (mm/dd/yyyy). The 'Employee Information' section includes fields for Org (TeamKeeper | TeamKepe), Login Type (Login and Web Clock), Exempt (Exempt), Service Credit (03/01/2020), Job Title, Employee Type (Part Time), Ethnicity, Vendor Name, Expire Date, Citizenship, Union, and Imm. Status. Red boxes highlight the 'Hire Date' field (07/25/2023) and the 'Service Credit' field (03/01/2020).

Update User Information

After a user profile is created, you can make any changes to assignments or roles from Employee Management. After locating the employee and selecting their name, their profile information will load. Updating employee options include:

Profile – Locate the field that needs to be changed: user information (name, password, IDs, etc.) employee information (employee type, login type, exempt status, etc.) or personal information (email address, phone numbers, addresses, emergency contact, etc.) and make sure to click “Save” at the bottom. Please be advised that some fields like employee ID or employee type could possibly be related to your accounting or payroll export and making changes could cause an error.

Group – ending an association to a current group or adding a new group to the list. You can stop the employee’s association by entering an end date in the row for the group.

Profile Groups Manager Authorized Charges Class Task#s Roles

Employee Groups

02/19/2024 to 02/25/2024

filter Groups...

Group	Housed	Start Date	End Date
Direct Labor		01/01/2024	
Indirect Labor		01/01/2024	

Assign Employee To Groups

Assign: Brown, Kevin

To: select a Groups

Housed:

Apply All Charge Codes:

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign

To assign the employee to a group, use the box on the right side. By selecting the To field, a list of current groups will be displayed. After you choose at least one, click the “Assign” button.

Profile Groups Manager Authorized Charges Class Task#s Roles

Employee Groups

02/19/2024 to 02/25/2024

filter Groups...

Group	Housed	Start Date	End Date
Direct Labor		01/01/2024	
Indirect Labor		01/01/2024	

Assign Employee To Groups

Assign: Brown, Kevin

To: select a Groups

Housed:

Apply All Charge Codes:

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign

By changing the date range, you can view historical or future data.

Profile Groups Manager Authorized Charges Class Task#s Roles

Employee Groups

02/19/2024 to 02/25/2024

filter Groups...

Group	Housed	Start Date	End Date
Direct Labor		01/01/2024	
Indirect Labor		01/01/2024	

Assign Employee To Groups

Assign: Brown, Kevin

To: select a Groups

Housed:

Apply All Charge Codes:

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign

Manager – this tab will allow you to manage the type of supervisor an employee is over a group. It is also possible to end a current assignment or enter a new assignment over a different group.

Profile Groups **Manager** Authorized Charges Class Task#s Roles

Groups Supervised

02/19/2024 to 02/25/2024

filter Groups...

Group	Manager Type	Start Date	End Date
Direct Labor	Active Manager	01/01/2024	

Assign Supervisor To Groups

Assign: Brown, Kevin

To: select a Groups

Manager Type:

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign

Authorized Charges – these are the items that the employee can see on the timesheet. If a job or pay type has ended, the authorized charge will automatically be ended. However, if it is just that employee’s assignment to that job that has ended, you will need to add a date to the end date column. If an authorized charge has not been used on a timesheet, it can be deleted. However, if it has been added to a timesheet, an end date must be added.

To end more than one authorized charge, check the boxes on the left column then choose “Deactivate” at the bottom.

Employee Management - Brown, Kevin

Profile Groups **Manager** Authorized Charges Class Task#s Roles

02/19/2024 to 02/25/2024 Priority Setup

filter employees...

- Active Only
- Accounting TK Guide
- Direct Labor
 - Anderson, David
 - Brown, Kevin
 - Johnson, Paul
 - King, Brian
 - Smith, John
 - Williams, Mary
- Indirect Labor
- View All

filter authorized charges...

Group	Charge Code	Pay Type	Org	Start Date	End Date	Hours	Pay	Bill	Labor Category	Core	Default	Priority	Allocation
New													
click here to add an authorized charge													
Direct Labor													
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor D...	HOL Holiday	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input type="checkbox"/>	Direct Labor	Direct Labor D...	OT Overtime	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor D...	PTO PTO	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor D...	REG Regular	TeamKeeper ...	01/01/2024	0	0.00	0.00					
Indirect Labor													
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	HOL Holiday	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	PTO PTO	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	SICK Sick Leave	TeamKeeper ...	01/01/2024	0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	VAC Vacation	TeamKeeper ...	01/01/2024	0	0.00	0.00					

8 records, 3 selected

Save Delete **Deactivate**

Deactivate Authorized Charges

The selected authorized charges will be deactivated on the selected date. If you do not specify a date, the operation will be canceled.

End Date: 07/16/2023

OK Cancel

After confirming the end date, the page will save and display the end dates.

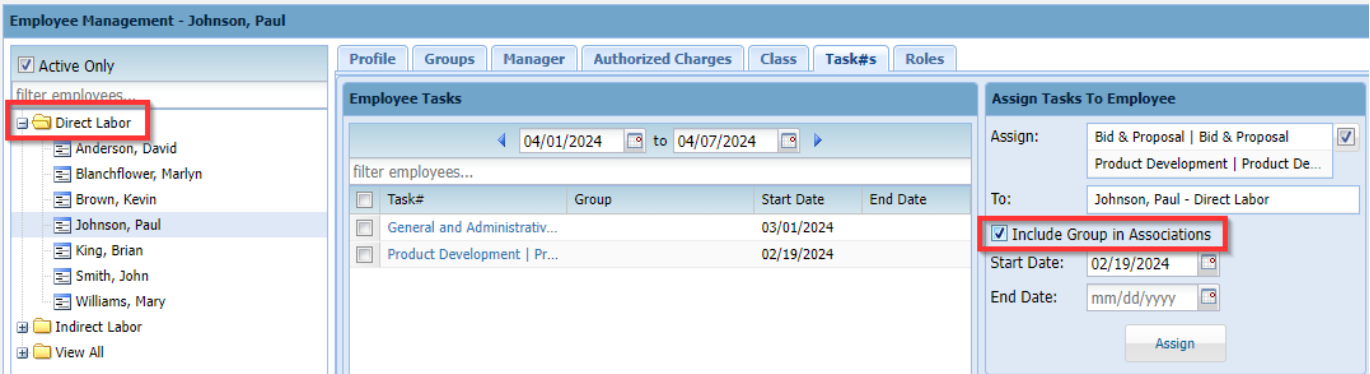
Group	Charge Code	Pay Type	Org	Start Date	End Date	Hours	Pay	Bill	Labor Category	Core	Default	Priority	Allocation	
New														
click here to add an authorized charge						0	0.00	0.00						
Direct Labor														
<input type="checkbox"/>	Direct Labor	Direct Labor D...	HOL Holiday	TeamKeeper ...	01/01/2024	02/21/2024	0	0.00	0.00					
<input type="checkbox"/>	Direct Labor	Direct Labor D...	OT Overtime	TeamKeeper ...	01/01/2024	02/21/2024	0	0.00	0.00					
<input type="checkbox"/>	Direct Labor	Direct Labor D...	PTO PTO	TeamKeeper ...	01/01/2024		0	0.00	0.00					
<input type="checkbox"/>	Direct Labor	Direct Labor D...	REG Regular	TeamKeeper ...	01/01/2024	02/21/2024	0	0.00	0.00					
Indirect Labor														
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	HOL Holiday	TeamKeeper ...	01/01/2024		0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	PTO PTO	TeamKeeper ...	01/01/2024		0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	SICK Sick Leave	TeamKeeper ...	01/01/2024		0	0.00	0.00					
<input type="checkbox"/>	Indirect Labor	Indirect Labor ...	VAC Vacation	TeamKeeper ...	01/01/2024		0	0.00	0.00					

To remove an inactive date, simply click on the date, select it with your cursor and hit backspace. Make sure to click “Save” at the bottom.

Class – This tab is used to store QuickBooks class information. For export purposes, an employee can only be actively assigned to one class at a time. Classes will have to be created in Class Management before they can be given to the employee. To add an end date, click in the active class’ row directly under the end date header. If a new class needs to be added, use the box on the right side “Assign Employee to Class”.

Tasks – Task assignment including start, end dates and group association can be managed from the employee’s task tab. If a task is used on a timesheet, the assignment cannot be deleted so an end date will have to be added.

If these tasks are dependent on the group association you must choose the employee from that group (not View All) on the left side of the page. Choose the tasks then check the box “Include Groups in Associations”. This will limit how the employee sees that task.



Employee Management - Johnson, Paul

Active Only

filter employees...

Direct Labor

- Anderson, David
- Blanchflower, Marlyn
- Brown, Kevin
- Johnson, Paul
- King, Brian
- Smith, John
- Williams, Mary
- Indirect Labor
- View All

Profile Groups Manager Authorized Charges Class Task#s Roles

Employee Tasks

04/01/2024 to 04/07/2024

filter employees...

Task#	Group	Start Date	End Date
<input type="checkbox"/>	General and Administrativ...	03/01/2024	
<input type="checkbox"/>	Product Development Pr...	02/19/2024	

Assign Tasks To Employee

Assign: Bid & Proposal | Bid & Proposal

Product Development | Product De...

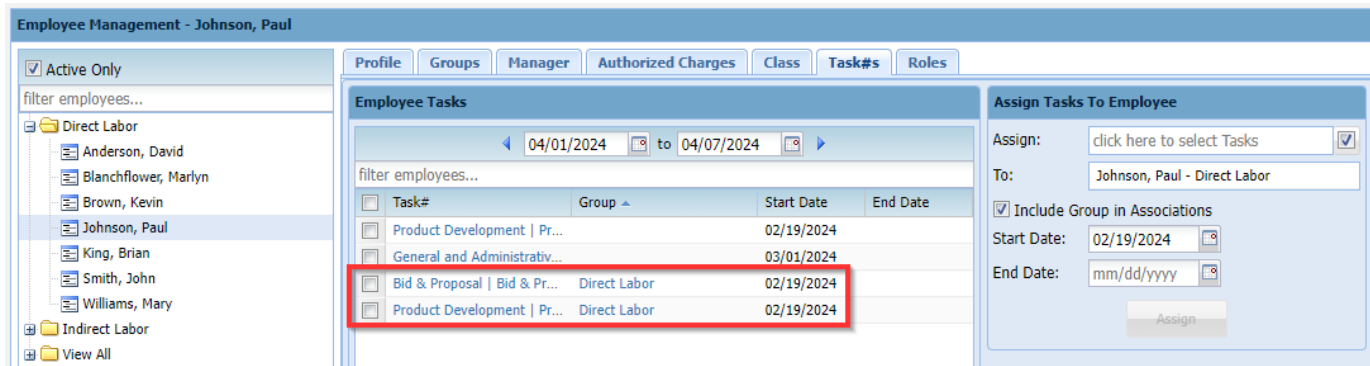
To: Johnson, Paul - Direct Labor

Include Group in Associations

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign



Employee Management - Johnson, Paul

Active Only

filter employees...

Direct Labor

- Anderson, David
- Blanchflower, Marlyn
- Brown, Kevin
- Johnson, Paul
- King, Brian
- Smith, John
- Williams, Mary
- Indirect Labor
- View All

Profile Groups Manager Authorized Charges Class Task#s Roles

Employee Tasks

04/01/2024 to 04/07/2024

filter employees...

Task#	Group	Start Date	End Date
<input type="checkbox"/>	Product Development Pr...	02/19/2024	
<input type="checkbox"/>	General and Administrativ...	03/01/2024	
<input checked="" type="checkbox"/>	Bid & Proposal Bid & Pr...	02/19/2024	
<input checked="" type="checkbox"/>	Product Development Pr...	02/19/2024	

Assign Tasks To Employee

Assign: click here to select Tasks

To: Johnson, Paul - Direct Labor

Include Group in Associations

Start Date: 02/19/2024

End Date: mm/dd/yyyy

Assign

Roles – Every user is given the Employee role when the profile is originally created. To add new roles use the link “click here to add a role” under the list of current roles. There are no start or end date options. Once a new role is added, the employee role can be removed if necessary (for example, an Administrator user that will not be creating a timesheet can remove the employee role so that they do not receive email notifications related to timesheets). User will need to log out and log back in before changes will be seen.

After assigning a role that can go over a group (Supervisor, Timekeeper, Scheduler, etc.) you will need to go to Group Management and choose the group that employee will be delegated over.

To remove access, check the box beside the role and click “Delete” at the bottom. If you are removing a role that is linked to a group (ex – Supervisor as an Active Manager over a group) you will need to end the group assignment as well.

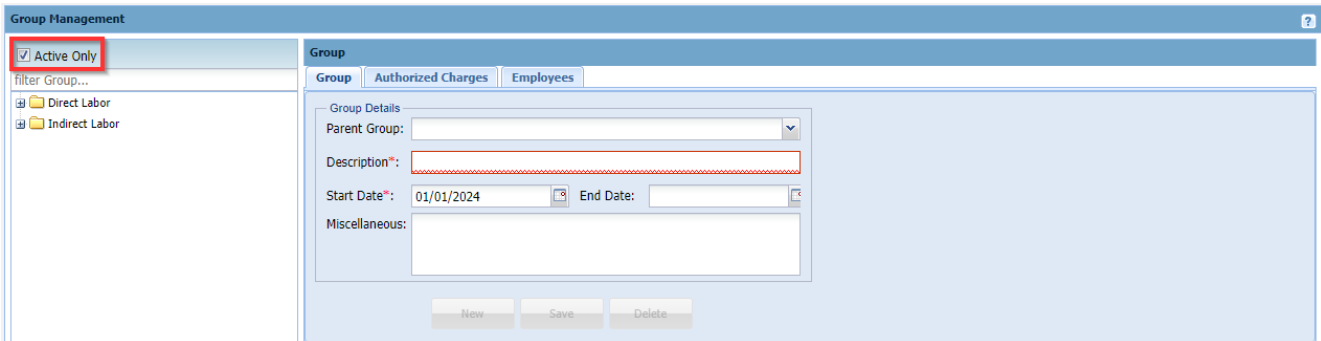
Group Management

Administrators will be using Group Management to:

- Create and manage groups
- Manage and assign supervisors over groups
- Manage and assign clients over groups
- Update authorized charges available in the group
- Add and manage employees in the group

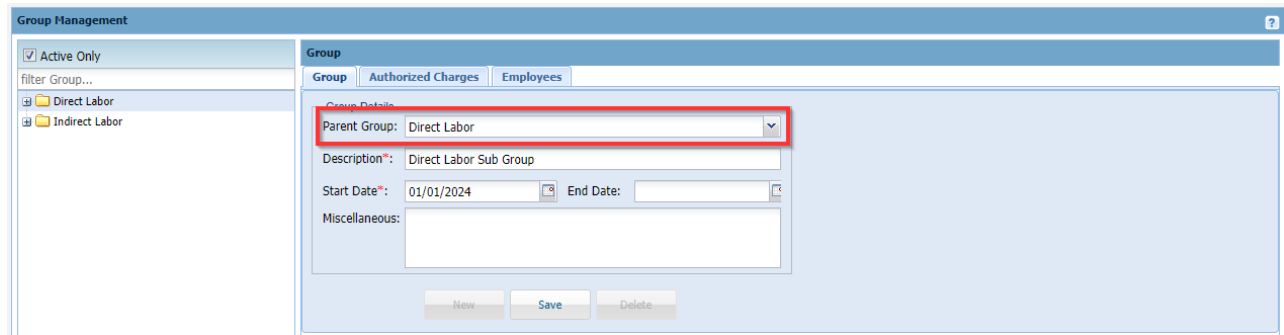
Create and Manage Groups

From Group Management, you are able to see all of the currently active groups. To view groups that have ended or are active yet, click the checkbox next to “Active Only” to move the marker.



To create a new group, fill in the Description field and the start date. Fields for end date, miscellaneous and parent date are not required. If you have selected a group on the left column, you will need to click the “New” button before entering new group information. In some setup cases, the Miscellaneous field is used for accounting or payroll export mapping. Check with your Accountant user or view other established groups to see if the Miscellaneous field has been completed or left blank.

To create a sub group, first click the parent group on the left column. Click “New” and choose the parent group from the dropdown menu for parent group.



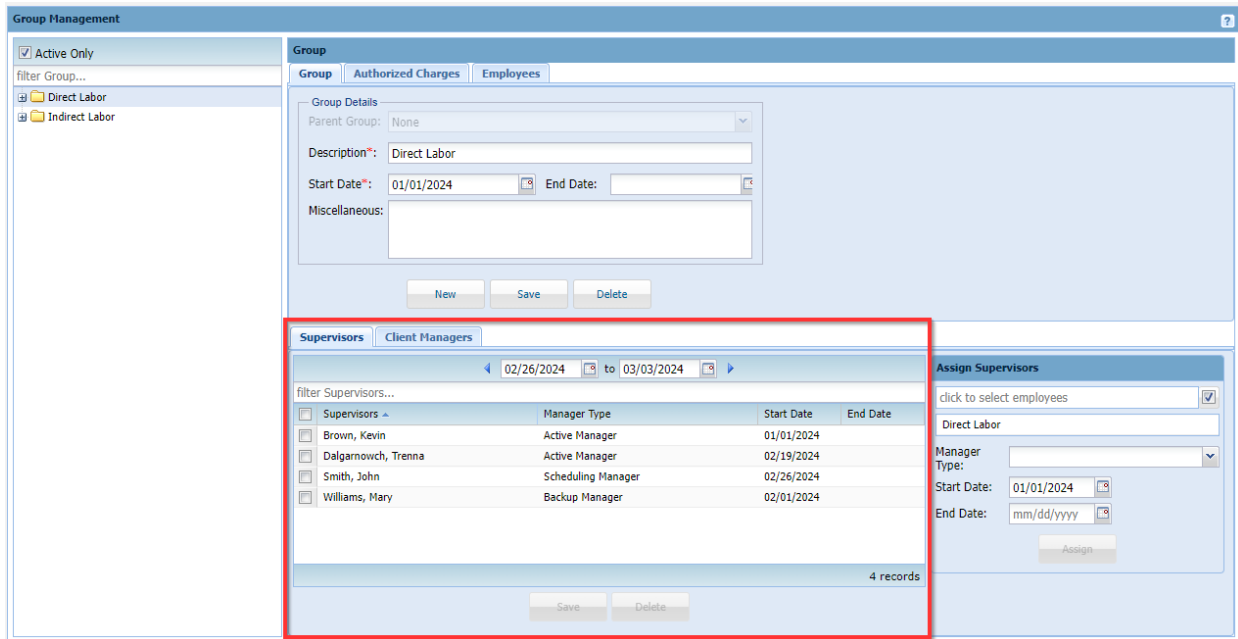
To end a group, choose the group name from the left column and enter an end date. After you click the “Save” button at the bottom of the console, the group name will no longer appear on the active list unless the end date is a future date. Once the end date is reached, the employees listed in that group will not be able to choose it on the timesheet, however, all data that is already on the timesheet will still be able to be exported or reported from the Reports console.

Once you create a new group, you will need to add Authorized Charges (unless this is a supervisor group), add employees and assign the Authorized Charges to the employees.

Manage and Assign Supervisors

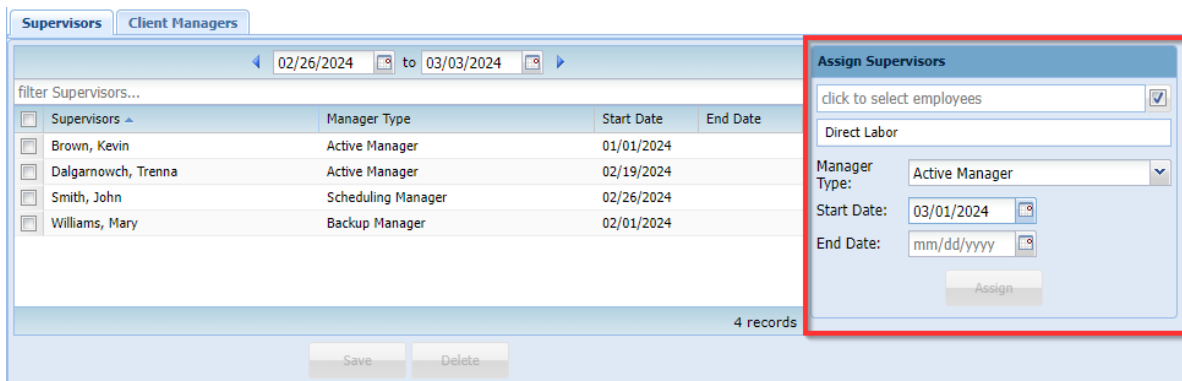
Administrators will be able to see any timesheets for the site but only Active Managers and Backup Managers can receive notifications regarding timesheets and leave requests. Assigning supervisors over groups is also a way to give supervisor access to users that need it while restricting the employees they are allowed to approve.

After opening Group Management, click the name of the group to see the current list of assigned supervisors.



To view historical data, use the calendar dates above the list of supervisors. You can end a manager association by entering an end date in the row with their name.

To add a new manager, use the box “Assign Supervisors”. First click to select the employee that needs to be assigned. Then from the dropdown menu, choose the type of manager needed to go over that group.



Supervisor Types

Accounting Manager – User has access to create Charge Codes, Pay Types, etc. They have access to leave (if applicable) configuring and assigning.

Active Manager – Highest level of Supervisor. They can create, view, edit and approve timesheets. They will receive emails notifications (if applicable) for their group.

Admin Manager – They have admin rights over the group but this type does not give them the Supervisor Role like Active Manager does. It is only admin privileges.

Backup Manager – They have the same power as an Active Manager but do not necessarily receive notifications. Go to Administrator > Notifications to see if Backup Manager is selected.

Reports Manager – They have access to the Reports page where they can run reports based on the group they are the Reports Manager over.

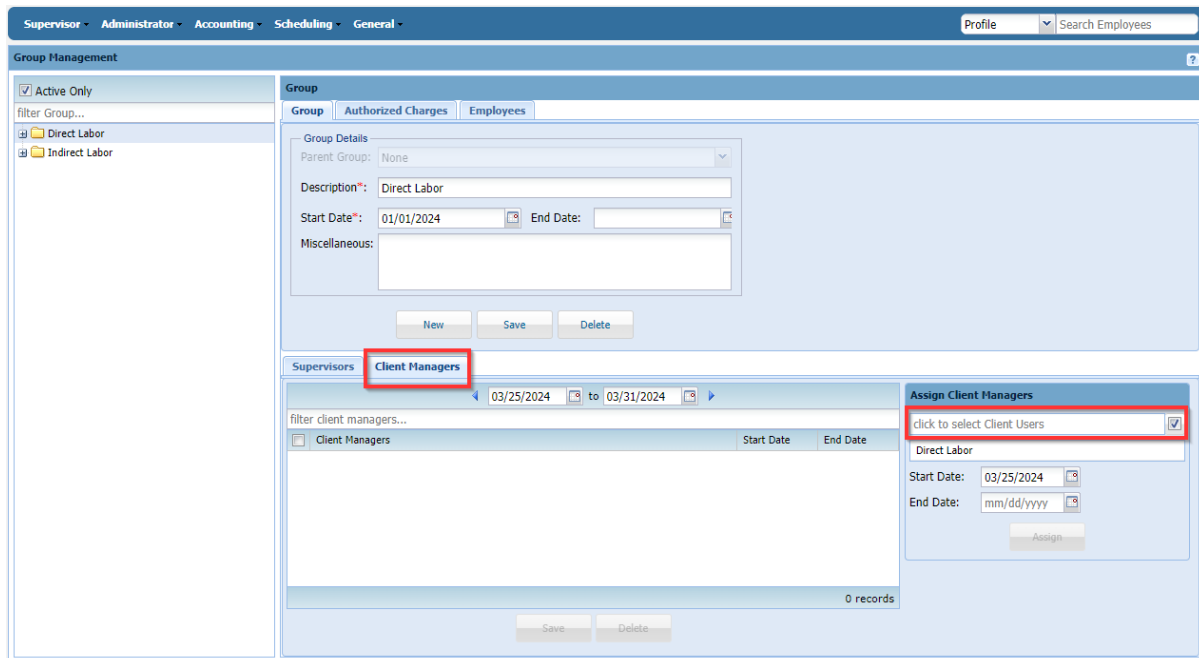
Scheduling Manager – They have access to create schedules, as well as view/approve leave request (if applicable) and holiday schedules for that group.

Timekeeper – Timekeepers have the power to view timesheets as well as edit timesheets but have no power to approve timesheets.

Manage and Assign Clients

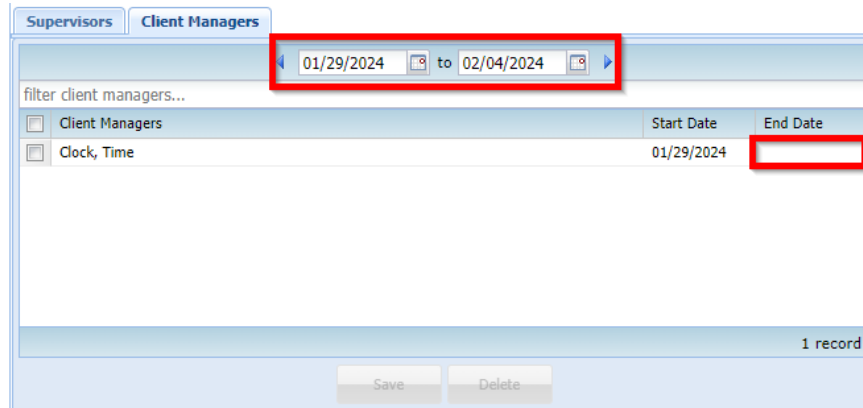
After creating the Client user from Administrator > Client Management, the new client user will need to be assigned over a group. Client managers will only be able to see the employees and job codes assigned in that group. For example, if an employee is in 2 groups – direct and indirect but the client is only a manager over one, only the charge codes in that group will display for the employee.

From Group Management, click the tab for “Client Managers” and it will display all that are currently assigned. To add assignments, use the box on the right side “Assign Client Managers” to select from the list of active Clients and after confirming the start date, click “Assign”.



The screenshot shows the 'Group Management' interface. The 'Client Managers' tab is selected and highlighted with a red box. The 'Assign Client Managers' panel on the right is also highlighted with a red box, showing a dropdown menu with 'click to select Client Users' and a checkmark, and an 'Assign' button.

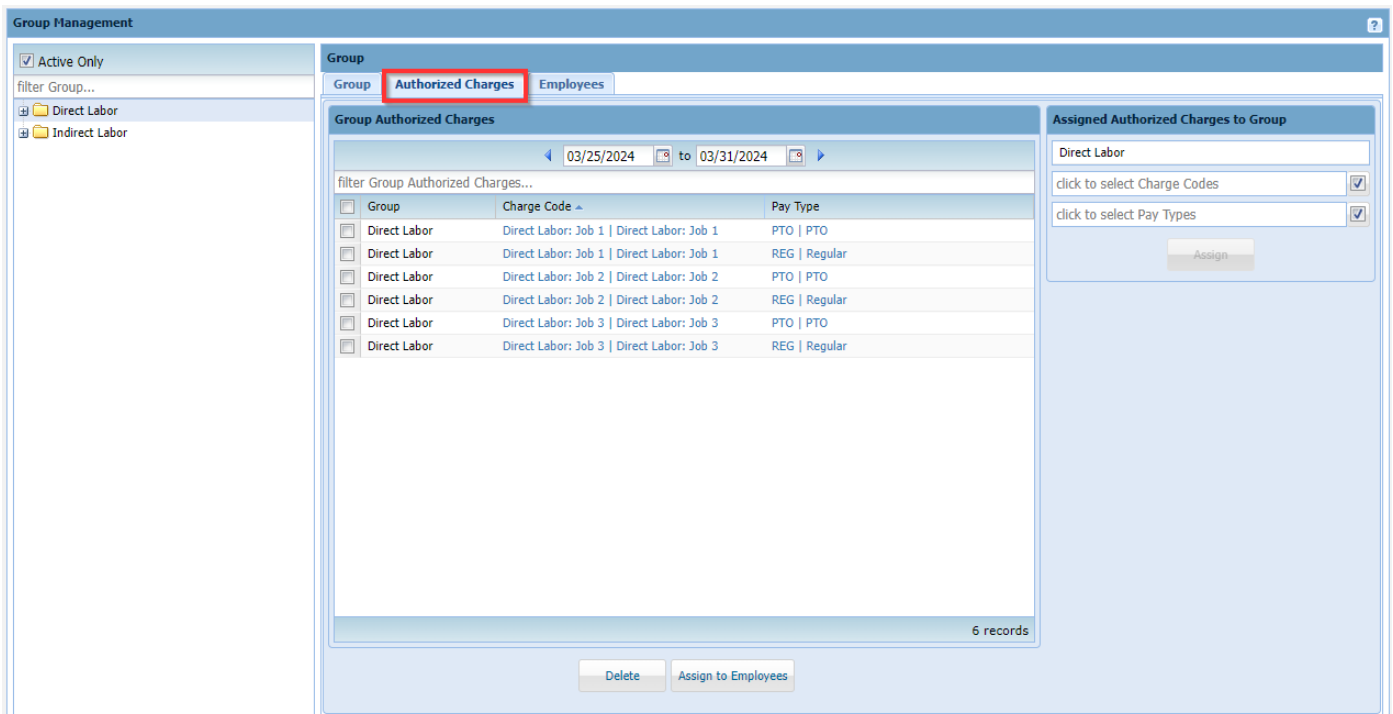
To view historical data, use the calendar dates above the list of clients. You can end client access by entering an end date in the row with their name.



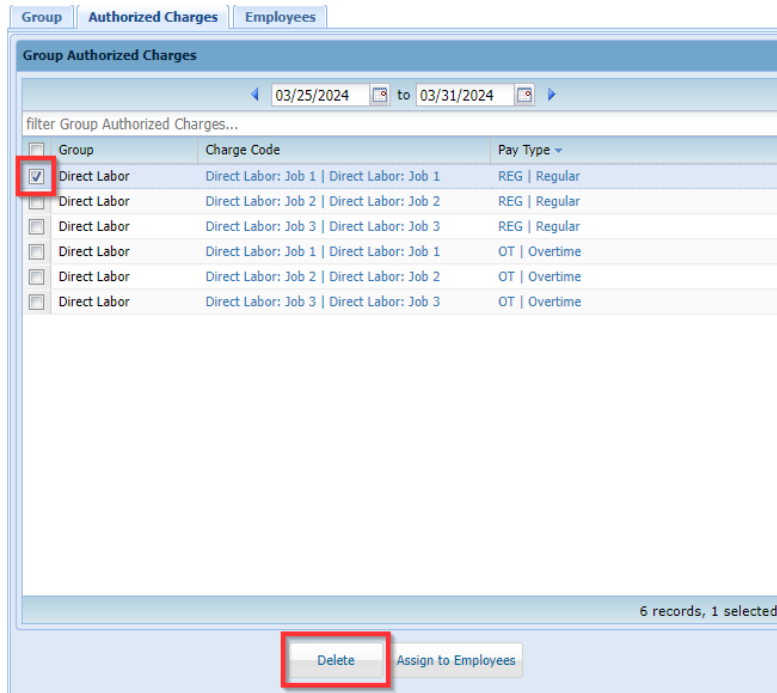
Create and Update Group Authorized Charges

Authorized Charges are Charge Code + Pay Type combinations that can be assigned to employees to use on the timesheet. Since most likely the timesheet data will be going back to an accounting or payroll software, the pairing of these items is very important to insure that billable items are coded and captured correctly.

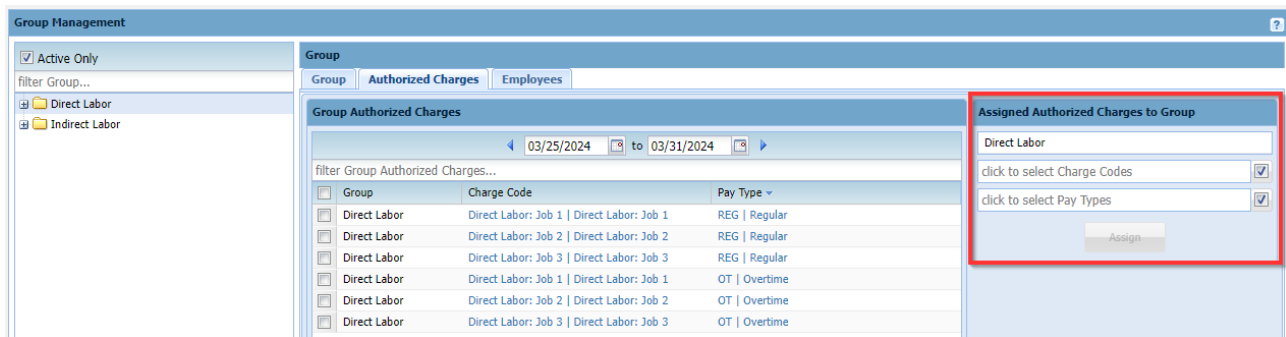
From Group Management, click Authorized Charges and all current charges will be displayed.



To view historical data, use the calendar dates above the list of Authorized Charges. These charges do not have start and end dates, however they are controlled by start and end dates on the Charge Code or Pay Type. If a code is not used on a timesheet, it can be deleted by checking the box beside the Authorized Charge then “Delete” at the bottom.

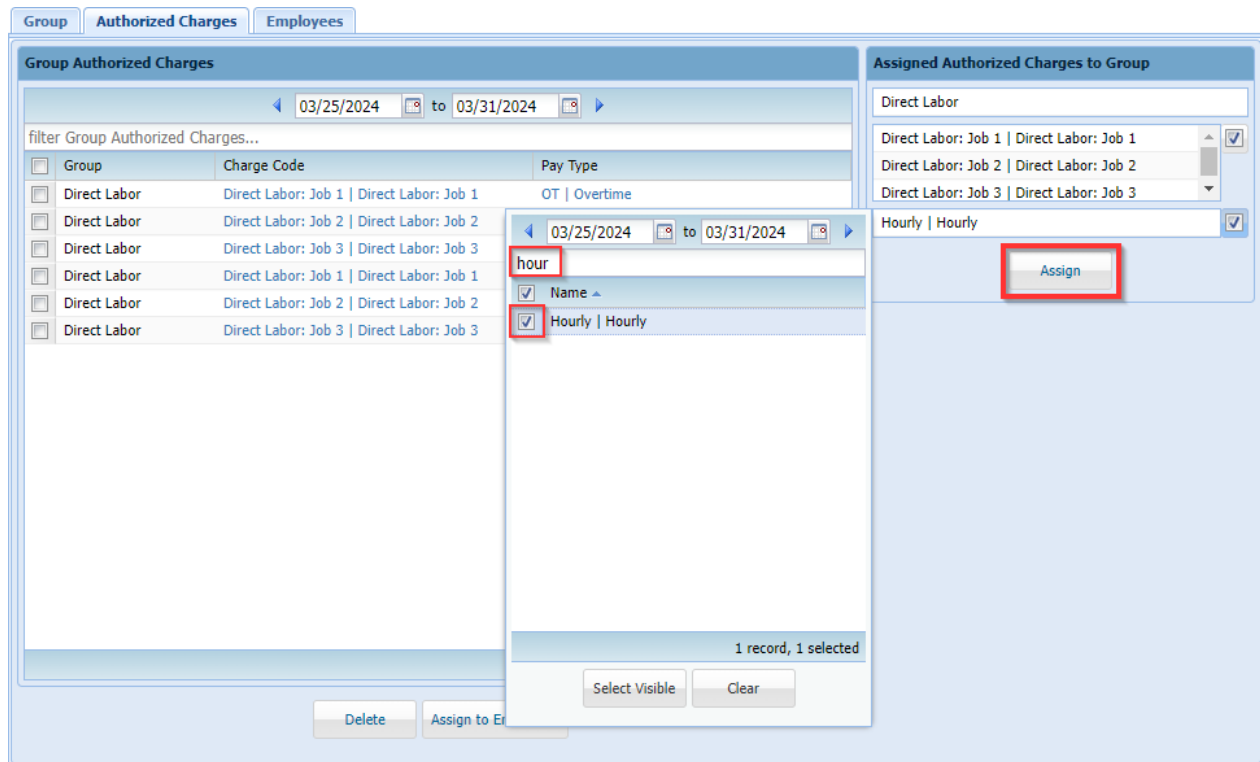


To add a new Authorized Charge, use the box on the right side “Assigned Authorized Charges to Group”.



First, select your Charge Code (to select more than one, check the boxes beside the names) and then repeat the process for the Pay Type. You can also use the box to filter for a specific Charge Code or Pay Type. Once the items are chosen, click “Assign”.

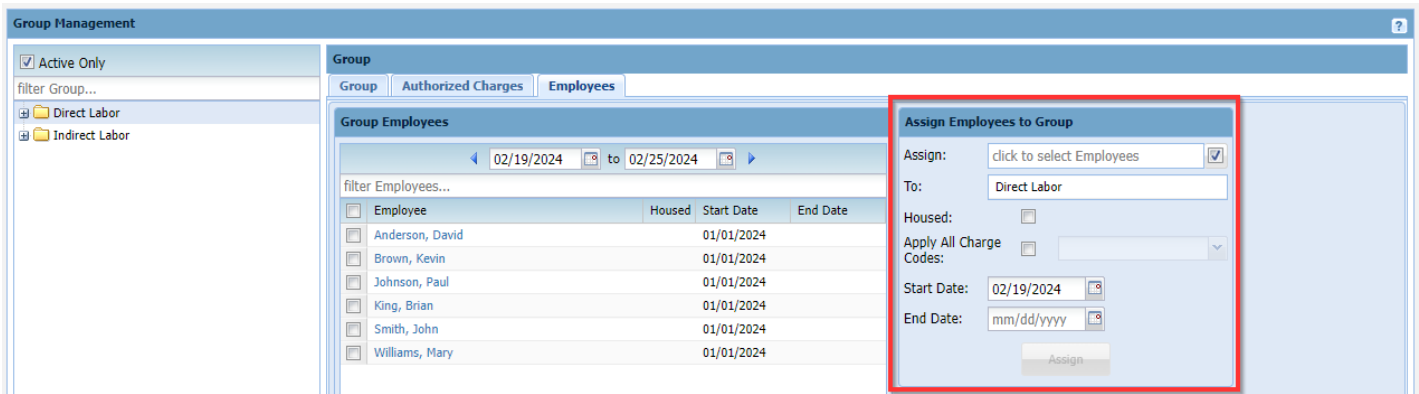
Remember that an employee does not have to be assigned all of the Authorized Charges in the group.



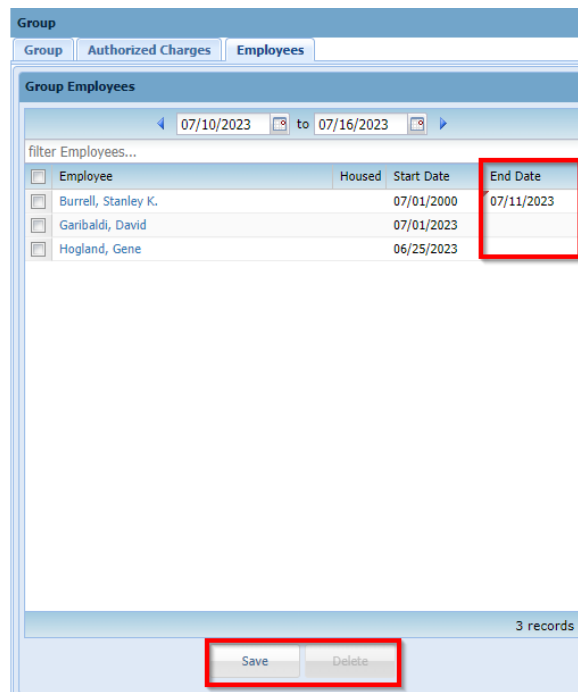
Add and Manage Employee Group Associations

The “Employees” tab on Group Management is used for assigning employees to the group or handling their end date in that group. Employees must be in the group in order to be assigned to any of the Authorized Charges. If their assignment in the group is ended, they will not be able to use any of the Authorized Charges assigned to them.

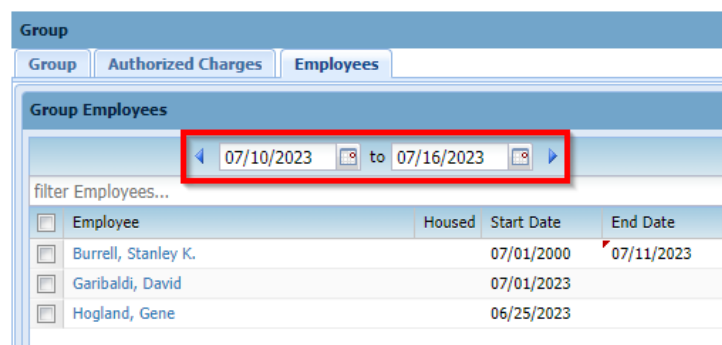
To add a new employee to the group, open the group from Group Management and click the “Employees” tab. On the right side of the page, use the box “Assign Employees to Group” to select the users that need to be assigned to the group.



An employee cannot be deleted from the group if they have any Authorized Charges assigned to them. However, if they have never been assigned any charges, you can select the checkbox next to their name and the “Delete” button at the bottom of the page. To end an employee’s group assignment, enter the last date they need access in the column under end date and click “Save” at the bottom.

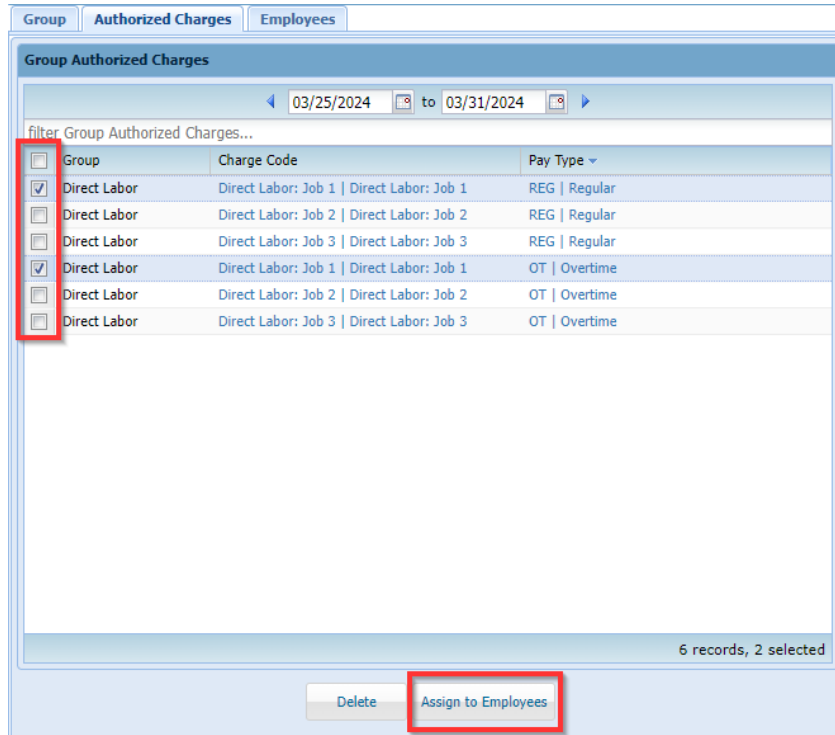


Historical data can be viewed by clicking the calendars at the top of the employee tab.



Assign Group Authorized Charges to Employees

Once the employee is active in the group and the Authorized Charges are available, click the “Authorized Charges” tab to assign them to employees. Using the checkboxes to the left of the row, select all that need to be given to the employee(s). After selecting all codes, click “Assign to Employees” at the bottom.



The screenshot displays the 'Group Authorized Charges' window. At the top, there are tabs for 'Group', 'Authorized Charges', and 'Employees'. Below the tabs, a date range is set from 03/25/2024 to 03/31/2024. A filter box contains the text 'filter: Group Authorized Charges...'. The main area is a table with the following data:

<input type="checkbox"/>	Group	Charge Code	Pay Type
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor: Job 1 Direct Labor: Job 1	REG Regular
<input type="checkbox"/>	Direct Labor	Direct Labor: Job 2 Direct Labor: Job 2	REG Regular
<input type="checkbox"/>	Direct Labor	Direct Labor: Job 3 Direct Labor: Job 3	REG Regular
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor: Job 1 Direct Labor: Job 1	OT Overtime
<input type="checkbox"/>	Direct Labor	Direct Labor: Job 2 Direct Labor: Job 2	OT Overtime
<input type="checkbox"/>	Direct Labor	Direct Labor: Job 3 Direct Labor: Job 3	OT Overtime

At the bottom right of the table area, it says '6 records, 2 selected'. Below the table are two buttons: 'Delete' and 'Assign to Employees', with the latter highlighted by a red box.

Alternatively, you can filter for the charge code or pay type needed for the employee. For example, the group’s Authorized Charges include both hourly and salary but the employee only needs salary. In the filter box, enter “salary” and all applicable codes will appear. Check the boxes next to the codes or the checkbox next to the Group header to select all visible.

Group

Group Authorized Charges Employees

Group Authorized Charges

07/10/2023 to 07/16/2023

sal

<input checked="" type="checkbox"/>	Group	Charge Code	Pay Type
<input checked="" type="checkbox"/>	Direct Labor	Direct Labor	Salary Pay Salary
<input checked="" type="checkbox"/>	Direct Labor	Holiday Holiday	Salary Pay Salary
<input checked="" type="checkbox"/>	Direct Labor	PTO PTO	Salary Pay Salary

3 records, 3 selected

Delete Assign to Employees

After selecting “Assign to Employees” a popup box will appear with all active employees. Use the checkboxes besides the employee(s) name to select all that need those codes. After choosing the Organization and start date, click “Assign” at the bottom. End date is optional and can be added later if necessary.

Assign Authorized Charges to Employees

filter employees...

<input type="checkbox"/>	Employee
<input type="checkbox"/>	Burrell, Stanley K.
<input type="checkbox"/>	Garibaldi, David
<input checked="" type="checkbox"/>	Hogland, Gene

Organization: [dropdown]

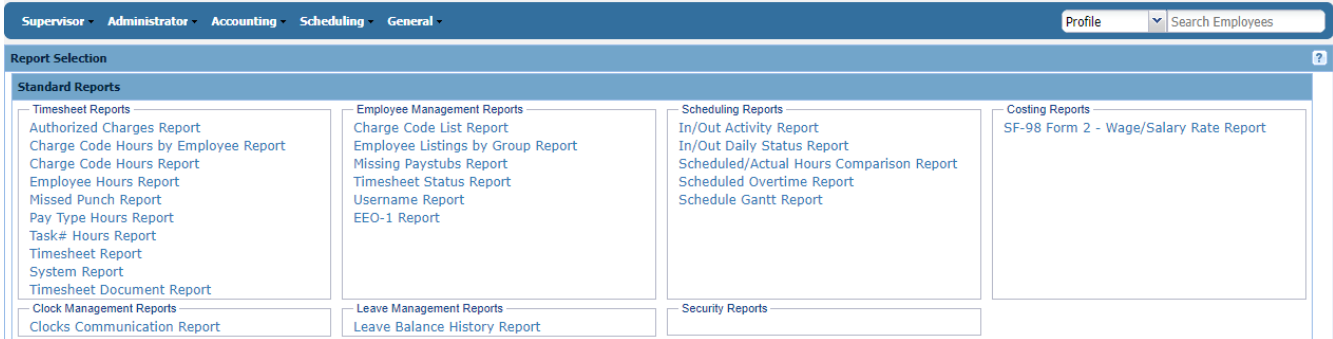
Start Date: 07/13/2023

End Date: mm/dd/yyyy

Assign Cancel

Reports

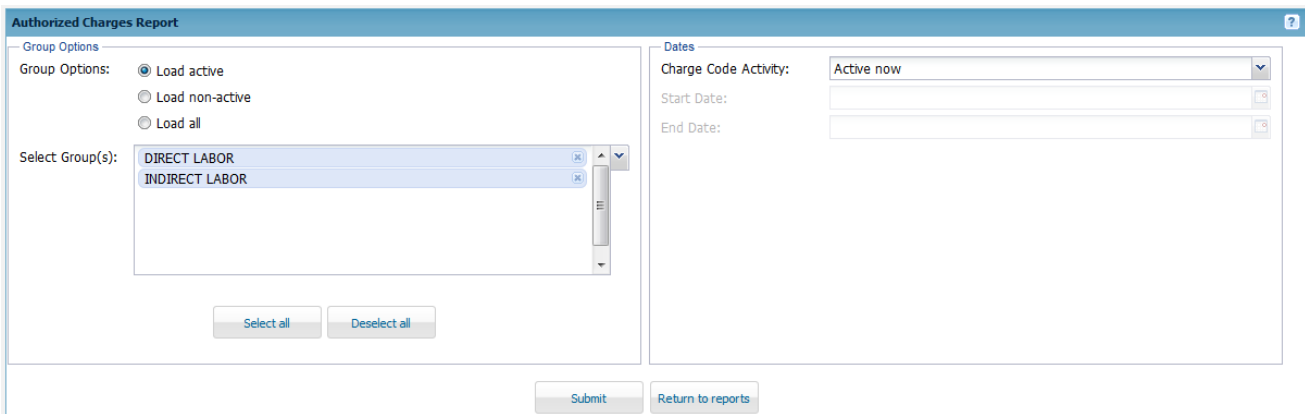
Standard reports are preloaded to the site and cover several categories of timesheet data. Custom reports are available – their fee is based on desired output format and complexity. Some reports are only available with the purchase of additional modules.



Authorized Charges Report

Requirements: Charges must be assigned to employees not just created in the group.

Input:



Output:

Authorized Charges Report					
Group	Last name	First name	Username	WBS	Paytype
Direct Labor	Burrell	Stanley	Stanley,Burrell	Direct Labor	Regular Pay
Direct Labor	Burrell	Stanley	Stanley,Burrell	Marketing	Regular Pay
Direct Labor	Burrell	Stanley	Stanley,Burrell	Performance	PTO #2
Direct Labor	Garibaldi	David	DavidG	Direct Labor	PTO #2
Direct Labor	Garibaldi	David	DavidG	Direct Labor	Regular Pay
Direct Labor	Garibaldi	David	DavidG	Marketing	Regular Pay
Direct Labor	Garibaldi	David	DavidG	Performance	PTO #2
Direct Labor	Garibaldi	David	DavidG	Holiday	Holiday
Direct Labor	Garibaldi	David	DavidG	PTO	PTO

Export Options: Download to Excel, Download to CSV or Printer Friendly

Charge Code Hours by Employee Report

Requirements: Employees must have timesheet data

Input:

Charge Code Hours by Employee Report
?

Employee Options

Employee Options:

Load active

Load non-active

Load all

Garibaldi, David

Charge Code Options

Charge Code Options:

Load active

Load non-active

Load all

Select Charge Code(s):

- Direct Labor: direct labor: [x]
- Direct Labor: marketing: marketing [x]
- Direct Labor: performance: performance [x]
- Direct Labor: pto: pto [x]
- Direct Labor: holiday: holiday [x]

Dates

Start Date: 07/01/2023

End Date: 07/13/2023

Output:

Charge Code Hours by Employee Report for 07/01/2023 to 07/13/2023
?

Download Excel File
Download CSV File
Printer-friendly
Return to Reports

Group	Org	Last name	First name	Weekend	WBS	Paytype	Hours
Direct Labor	JDub	Garibaldi	David	07/02/2023	Direct Labor	PTO #2	8.00
Direct Labor	JDub	Garibaldi	David	07/02/2023	Performance	PTO #2	8.00
Direct Labor	JDub	Garibaldi	David	07/09/2023	Holiday	Holiday	8.00
Direct Labor	JDub	Garibaldi	David	07/09/2023	Marketing	Regular Pay	24.61
Direct Labor	JDub	Garibaldi	David	07/09/2023	PTO	PTO	8.00
Direct Labor	JDub	Garibaldi	David	07/16/2023	Direct Labor	Regular Pay	9.00
Leave	JDub	Garibaldi	David	07/16/2023	Holiday	Holiday	48.00

Export Options: Download to Excel, Download to CSV or Printer Friendly

Charge Code Hours Report

Requirements: Employees must have timesheet data

Input:

Charge Code Hours Report
?

Charge Code Options

Charge Code Options:

Load active

Load non-active

Load all

Select Charge Code(s):

- direct labor: [x]
- holiday: holiday [x]
- marketing: marketing [x]
- performance: performance [x]
- pto: pto [x]

Org Options

Select Org(s):

- jdup:jdub [x]
- enterprises [x]

Group Options

Include SubGroups in Results

Group Options:

Load active

Load non-active

Load all

Select Group(s):

- direct labor [x]
- jive records [x]
- leave [x]
- mercury records [x]

Dates

Start Date: 07/01/2023

End Date: 07/14/2023

Output:

Charge Code Hours Report for 07/01/2023 to 07/14/2023							
Download Excel File Download CSV File Printer-friendly Return to Reports							
Group	Employee #	Employee	Charge Code	Pay Type	Task#	Hours	
Direct Labor	02112	Garibaldi, David	Direct Labor	PTO #2	Recording	8.00	
Direct Labor	02112	Garibaldi, David	Direct Labor	Regular Pay	Tracking	9.00	
Sub-Total:						17.00	
Direct Labor	02112	Garibaldi, David	Holiday	Holiday	-	8.00	
Sub-Total:						8.00	
Direct Labor	02112	Garibaldi, David	Marketing	Regular Pay	Tracking	24.61	
Sub-Total:						24.61	
Direct Labor	02112	Garibaldi, David	Performance	PTO #2	Headliner	8.00	
Sub-Total:						8.00	
Direct Labor	02112	Garibaldi, David	PTO	PTO	-	8.00	
Sub-Total:						8.00	
Leave	02112	Garibaldi, David	Holiday	Holiday	Holiday	48.00	
Sub-Total:						48.00	
Mercury Records	01	Walker, Kurtis	Direct Labor	PTO #2	-	8.00	
Mercury Records	01	Walker, Kurtis	Direct Labor	Regular Pay	-	8.00	
Mercury Records	01	Walker, Kurtis	Direct Labor	Regular Pay	Recording	2.00	
Sub-Total:						18.00	
Total:						131.61	

Export Options: Download to Excel, Download to CSV or Printer Friendly

Employee Hours Report

Requirements: Employees must have timesheet data.

Input:

Employee Hours Report
?

Employee Options

Employee Options:

Load active
 Load non-active
 Load all

Select employee(s):

Admin, System
 Anderson, David
 Benterman, Willa
 Blanchflower, Marilyn
 Brown, Kevin
 Crackel, Carlos

Org Options

Select Org(s):

teamkeeper:teamkeeper
 acct ok:accounts ok
 acct tx:account tx

Group Options

Include SubGroups in Results

Group Options:

Load active
 Load non-active
 Load all

Select Group(s):

Direct Labor
 Indirect Labor

Dates

Start Date:

End Date:

Output:

Employee Hours Report for 07/01/2023 to 07/14/2023							
Download Excel File Download CSV File Printer-friendly Return to Reports							
Group	Employee	Charge Code	Pay Type	Task#	Hours		
Direct Labor	Garibaldi, David	Direct Labor	PTO #2	Recording	8.00		
Direct Labor	Garibaldi, David	Direct Labor	Regular Pay	Tracking	9.00		
Direct Labor	Garibaldi, David	Holiday	Holiday	-	8.00		
Direct Labor	Garibaldi, David	Marketing	Regular Pay	Tracking	24.61		
Direct Labor	Garibaldi, David	Performance	PTO #2	Headliner	8.00		
Direct Labor	Garibaldi, David	PTO	PTO	-	8.00		
Sub-Total:					65.61		
Leave	Garibaldi, David	Holiday	Holiday	Holiday	48.00		
Sub-Total:					48.00		
Mercury Records	Walker, Kurtis	Direct Labor	PTO #2	-	8.00		
Mercury Records	Walker, Kurtis	Direct Labor	Regular Pay	-	8.00		
Mercury Records	Walker, Kurtis	Direct Labor	Regular Pay	Recording	2.00		
Sub-Total:					18.00		
Total:					131.61		

Export Options: Download to Excel, Download to CSV or Printer Friendly

Missed Punch Report (For use with clocks or in/out times)

Requirements: In/Outs must be used on the timesheet (either manual or web/physical clock entry)

Input:

Missed Punch Report
?

Group Options

Select Group(s):

Direct Labor x
 Indirect Labor x

Employee Options

Select Employee(s):

Anderson, David x
 Brown, Kevin x

Dates

Start Date: c

End Date: c

Time frame:

Output:

Export Options: Download to Excel, Download to CSV or Printer Friendly

Missed Punch Report for 02/18/2024 to 02/24/2024							
Download Excel File Download CSV File Printer-friendly Return to Reports							
Employee Name	Sun 02/18/24	Mon 02/19/24	Tue 02/20/24	Wed 02/21/24	Thu 02/22/24	Fri 02/23/24	Sat 02/24/24
David Anderson			In: Out:11:30a	In:7:00a Out:		In:7:00a Out:	

Pay Type Hours Report

Requirements: Timesheet data must be created

Input:

Pay Type Hours Report
?

Pay Type Options

Pay Type Options:

Load active
 Load non-active
 Load all

reg:regular [X] ▲▼

ot:overtime [X] ▲▼

hol:holiday [X] ▲▼

pto:pto [X] ▲▼

vac:vacation [X] ▲▼

sick:sick leave [X] ▲▼

Org Options

Select Org(s):

teamkeeper:teamkeeper [X] ▲▼

acct ok:accounts ok [X] ▲▼

acct bx:account bx [X] ▲▼

GroupOptions

Include SubGroups in Results

Group Options:

Load active
 Load non-active
 Load all

Select Group(s):

direct labor [X] ▲▼

indirect labor [X] ▲▼

Dates

Start Date:

End Date:

Output:

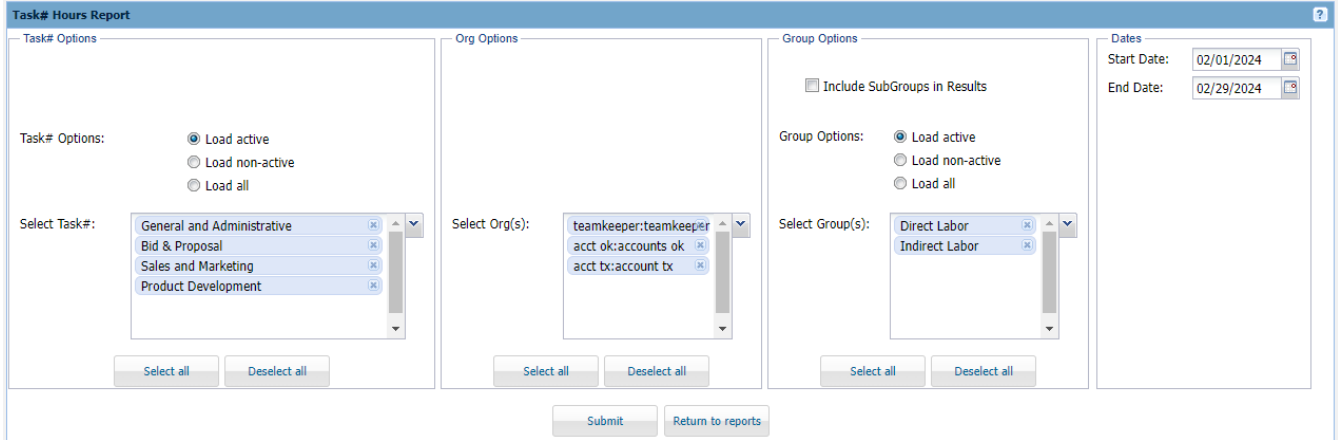
Pay Type Hours Report for 07/01/2023 to 07/17/2023						
Download Excel File Download CSV File Printer-friendly Return to Reports						
Group	Employee	Charge Code	Pay Type	Task#	Hours	
Direct Labor	Garibaldi, David	Holiday	Holiday	-	8.00	
Sub-Total:					8.00	
Direct Labor	Garibaldi, David	PTO	PTO	-	8.00	
Sub-Total:					8.00	
Direct Labor	Garibaldi, David	Direct Labor	PTO #2	Recording	8.00	
Direct Labor	Garibaldi, David	Performance	PTO #2	Headliner	8.00	
Sub-Total:					16.00	
Direct Labor	Garibaldi, David	Direct Labor	Regular Pay	Tracking	9.00	
Direct Labor	Garibaldi, David	Marketing	Regular Pay	Tracking	24.61	
Direct Labor	Hogland, Gene	Direct Labor	Regular Pay	-	24.00	
Sub-Total:					57.61	
Leave	Garibaldi, David	Holiday	Holiday	Holiday	48.00	
Sub-Total:					48.00	
Mercury Records	Walker, Kurtis	Direct Labor	PTO #2	-	8.00	
Sub-Total:					8.00	
Mercury Records	Walker, Kurtis	Direct Labor	Regular Pay	-	8.00	
Mercury Records	Walker, Kurtis	Direct Labor	Regular Pay	Recording	2.00	
Sub-Total:					10.00	
Total:					155.61	

Export Options: Download to Excel, Download to CSV or Printer Friendly

Task# Hours Report

Requirements: Tasks must be assigned and chosen on the timesheets

Input:



Output:



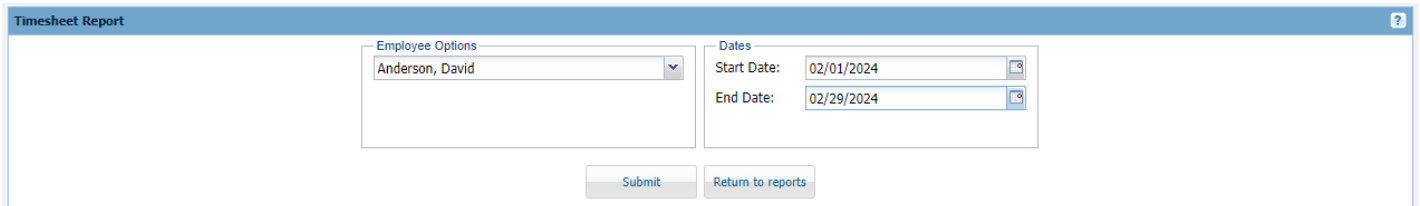
Group	Employee	Charge Code	Pay Type	Task#	Hours
Direct Labor	Anderson, David	Direct Labor: Job 2	REG	Bid & Proposal	24.00
Sub-Total:					24.00
Direct Labor	Anderson, David	Direct Labor: Job 1	REG	General and Administrative	16.00
Sub-Total:					16.00
Direct Labor	Anderson, David	Direct Labor: Job 1	REG	Product Development	16.00
Sub-Total:					16.00
Direct Labor	Anderson, David	Direct Labor: Job 2	REG	Sales and Marketing	16.00
Sub-Total:					16.00
Total:					72.00

Export Options: Download to Excel, Download to CSV or Printer Friendly

Timesheet Report

Requirements: Employee chosen must have a timesheet for the selected dates

Input:



Output:

Timesheet Report for 02/01/2024 to 02/29/2024														
Download Excel File	Download CSV File	Printer-friendly	Return to Reports											
Emp ID	Last name	First name	Middle Initial	Week Ending Date	Revision	WBS	Paytype	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
21	Anderson	David	null	02/18/2024	0	Direct Labor	REG	0.00	8.00	8.00	8.00	0.00	0.00	0.00
21	Anderson	David	null	02/18/2024	0	Direct Labo...	REG	0.00	8.00	0.00	0.00	8.00	0.00	0.00
21	Anderson	David	null	02/18/2024	0	Direct Labo...	REG	8.00	0.00	8.00	8.00	0.00	0.00	0.00
21	Anderson	David	null	02/25/2024	0	Direct Labo...	REG	4.00	1.75	0.00	4.00	0.00	0.00	0.00
21	Anderson	David	null	02/25/2024	0	Direct Labo...	REG	4.00	1.75	0.00	4.00	0.00	0.00	0.00
21	Anderson	David	null	03/03/2024	0	Direct Labo...	REG	0.00	8.00	8.00	0.00	0.00	0.00	0.00
21	Anderson	David	null	03/03/2024	0	Direct Labo...	REG	8.00	0.00	0.00	8.00	8.00	0.00	0.00

Export Options: Download to Excel, Download to CSV or Printer Friendly

System Report

Requirements: Employees must have timesheet data

Input:

System Report

Employee Options:

Load active
 Load non-active
 Load all

Select employee(s):

Anderson, David
 Brown, Kevin

Org Options:

Select Org(s):

teamkeeper:teamkeeper
 acct ok:accounts ok
 acct tx:account tx

Group Options:

Include SubGroups in Results

Group Options:

Load active
 Load non-active
 Load all

Select Group(s):

Direct Labor
 Indirect Labor

Dates

Start Date: 02/01/2024

End Date: 02/29/2024

Output:

System Hours Report for 02/01/2024 to 02/29/2024																						
Download Excel File	Download CSV File	Printer-friendly	Return to Reports																			
Employee	02/01/24	02/02/24	02/03/24	02/04/24	02/05/24	02/06/24	02/07/24	02/08/24	02/09/24	02/10/24	02/11/24	02/12/24	02/13/24	02/14/24	02/15/24	02/16/24	02/17/24	02/18/24	02/19/24	02/20/24	02/21/24	02/22/24
Anderson, David	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	16.00	16.00	16.00	8.00	0.00	0.00	8.00	3.50	0.00	8.00	
Brown, Kevin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	9.00	9.00	7.00	7.00	0.00	0.00	9.00	9.00	9.00	0.00	
Total:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.00	25.00	25.00	23.00	15.00	0.00	0.00	17.00	12.50	9.00	8.00	

Export Options: Download to Excel, Download to CSV or Printer Friendly

Timesheet Document Report

Requirements: Employees must have timesheet documents

Input:

Timesheet Document Report

Criteria

Group Options

Include SubGroups

Group Options:

Load active

Load non-active

Load all

Select Group(s):

Direct Labor

Dates

First End Date:

Last End Date:

Output:

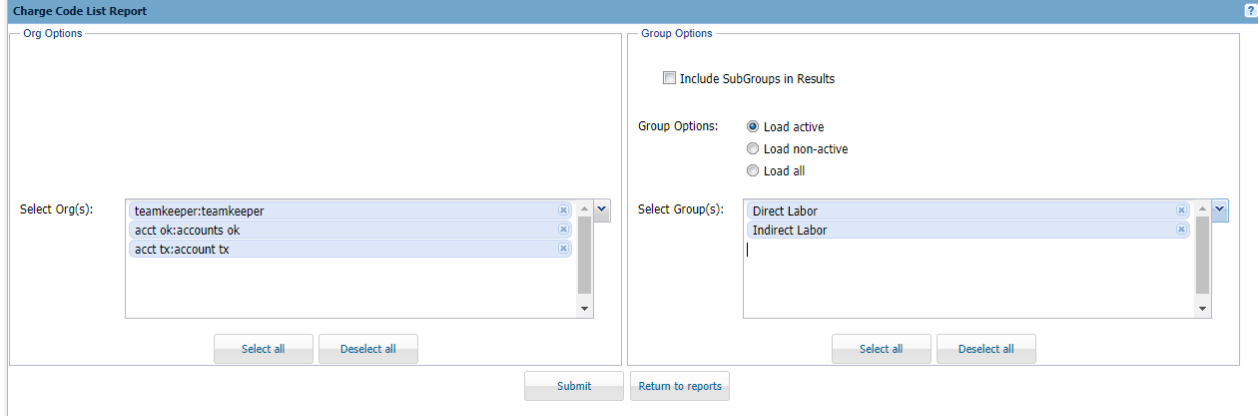
Timesheet Document Report						
Download Excel File Download CSV File Printer-friendly Back to Reports						
Timesheet Document Report Results						
Employee Number	Last Name	First Name	Group	Timesheet End Date	Total Numbers of Documents	Document Names
21	Anderson	David	Direct Labor	2024/02/25	3	Jury Duty 1.txt Jury Duty 2.txt Jury Duty 3.txt

Export Options: Download to Excel, Download to CSV or Printer Friendly

Charge Code List Report

Requirements: Orgs and groups selected must have codes assigned to them

Input:



Output:

Charge Code Hours Report for 11/01/2023 to 03/01/2024							
Group	Employee #	Employee	Charge Code	Pay Type	Task#	Hours	
Direct Labor	21	Anderson, David	Direct Labor	REG	-	140.00	
Direct Labor	28	Brown, Kevin	Direct Labor	REG	-	120.00	
Direct Labor	22	Johnson, Paul	Direct Labor	REG	-	120.00	
Direct Labor	24	King, Brian	Direct Labor	REG	-	120.00	
Direct Labor	3	Smith, John	Direct Labor	REG	-	120.00	
Direct Labor	26	Williams, Mary	Direct Labor	REG	-	120.00	
Sub-Total:						740.00	
Direct Labor	21	Anderson, David	Direct Labor: Job 1	REG	General and Administrat...	16.00	
Direct Labor	21	Anderson, David	Direct Labor: Job 1	REG	Product Development	16.00	
Sub-Total:						32.00	
Total:						772.00	

Export Options: Download to Excel, Download to CSV or Printer Friendly

Employee Listings by Group Report

Requirements: Employee(s) must be assigned to group(s)

Input: there is no input selection required

Output:

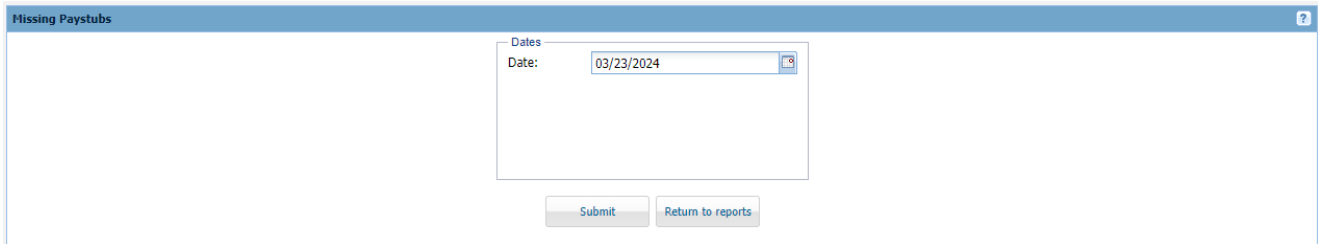
Employee List by Group Report				
Group	Last Name	First Name	Office Phone	E-Mail
Direct Labor	Smith	John		jsmith@webnode.com
Direct Labor	Anderson	David		danderson@auda.com.au
Direct Labor	Johnson	Paul		pjohnson@newsvine.com
Direct Labor	King	Brian		bking@i2i.jp
Direct Labor	Williams	Mary		mwilliams@etsy.com
Direct Labor	Blanchflower	Marlyn		mblanchflowerq@ed.gov
Direct Labor	Brown	Kevin		kbrown@comsenz.com
Indirect Labor	Smith	John		jsmith@webnode.com

Export Options: Download to Excel, Download to CSV or Printer Friendly

Missing Paystubs Report

Requirements: Pay Stub feature must be turned on and stubs loaded

Input:



The screenshot shows a web form titled "Missing Paystubs". It features a "Dates" section with a "Date:" label and a text input field containing "03/23/2024". Below the input field are two buttons: "Submit" and "Return to reports".

Output:



The screenshot shows a table titled "Missing Paystubs Results for 03/30/2024". The table has three columns: "Employee ID", "Last Name", and "First Name". The data is as follows:

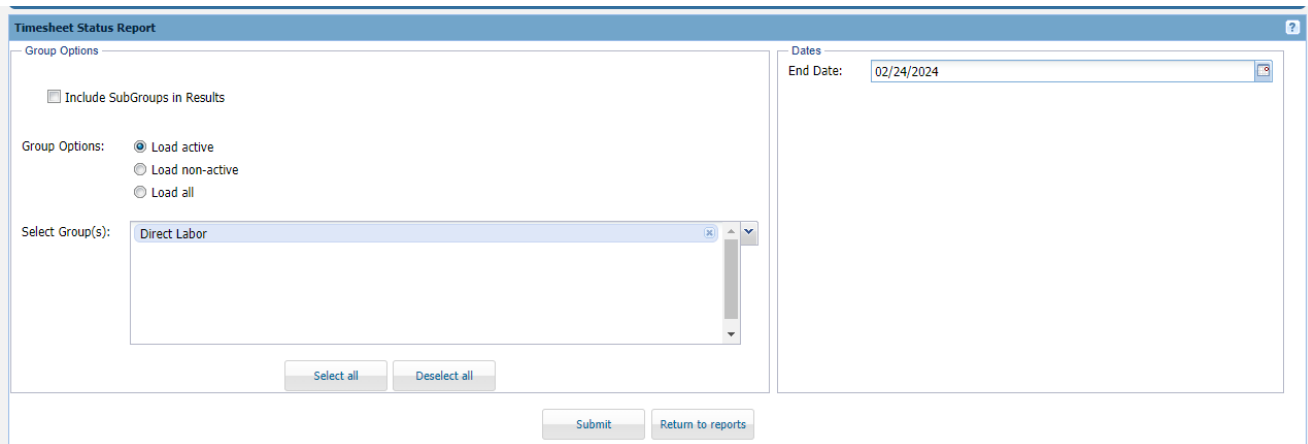
Employee ID	Last Name	First Name
10	Heifer	Biron
11	Sodeau	Mathe
12	Gerardin	Quint
13	Benterman	Willa
14	McAvin	Rois
15	Garcia	Maria
16	Neaverson	Hildegard
17	Rosettini	Cissiee

Export Options: Download to Excel, Download to CSV or Printer Friendly

Timesheet Status Report

Requirements: none

Input:



The screenshot shows a web form titled "Timesheet Status Report". It has a "Group Options" section with a checkbox for "Include SubGroups in Results" (unchecked). Below this are three radio buttons for "Group Options": "Load active" (selected), "Load non-active", and "Load all". There is a "Select Group(s):" dropdown menu with "Direct Labor" selected. At the bottom of this section are "Select all" and "Deselect all" buttons. To the right is a "Dates" section with an "End Date:" label and a text input field containing "02/24/2024". At the bottom of the form are "Submit" and "Return to reports" buttons.

Output:

Timesheet Status Report				
Group	Employee ID	Last Name	First Name	Timesheet Status
Direct Labor	21	Anderson	David	Approved w/o sign
Direct Labor	28	Brown	Kevin	Approved
Direct Labor	22	Johnson	Paul	No Timesheet

Export Options: Download to Excel, Download to CSV or Printer Friendly

Username Report

Requirements: Employee profile must have Org selected for their name to appear

Input:

Username Report

Org Options

Select Org(s):

- teamkeeper:teamkeeper
- acct ok:accounts ok
- acct tx:account tx

Group Options

Include Sub Groups in Results

Group Options:

Load active
 Load non-active
 Load all

Select Group(s):

- Direct Labor

Output:

Username Report				
Group	Org	Last Name	First Name	Username
Direct Labor	TeamKeeper	Anderson	David	danderson
Direct Labor	ACCT OK	Johnson	Paul	pjohnson
Direct Labor	ACCT TX	King	Brian	bking
Direct Labor	TeamKeeper	Blanchflower	Marlyn	mblanchflowerq
Direct Labor	TeamKeeper	Brown	Kevin	kbrown

Export Options: Download to Excel, Download to CSV or Printer Friendly

EEO-1 Report

Requirements: Human Resources must be turned on, profile fields filled out and EEOC Category must be selected under the profile Compensation tab

Input:

EEO-1 Report
Export to Excel Export to CSV Printer Friendly **Return to Reports**

Criteria

Start Date:

End Date:

Job Categ	Hispanic or Latino		Non-Hispanic or Latino											Overall Totals			
	Male	Female	Male							Female							
			White	Black or African American	Native Hawaiian or Pacific Islander	Asian	American Indian or Alaskan Native	Two or More Races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	American Indian or Alaskan Native		Two or More Races		

Output:

EEO-1 Report
Export to Excel Export to CSV Printer Friendly **Return to Reports**

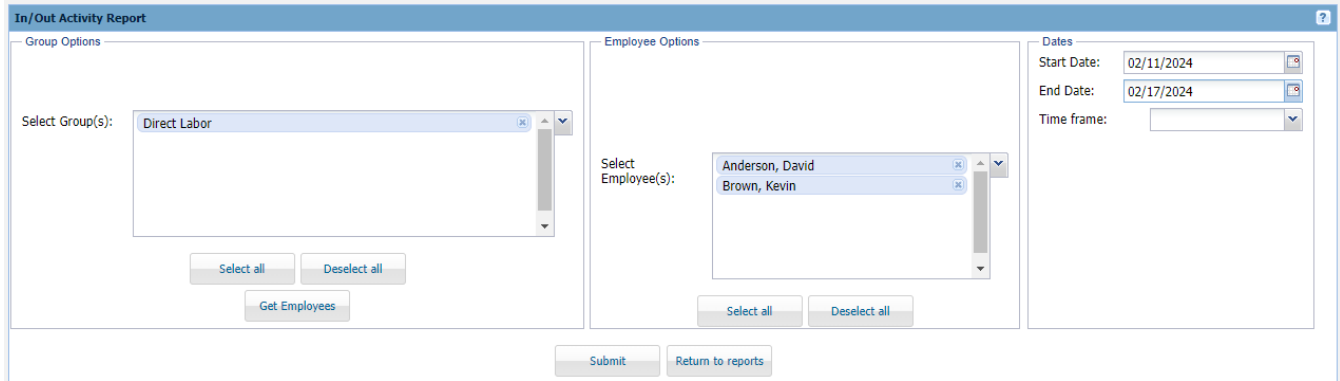
Job Category	Hispanic or Latino		Non-Hispanic or Latino											Overall Totals			
	Male	Female	Male							Female							
			White	Black or African American	Native Hawaiian or Pacific Islander	Asian	American Indian or Alaskan Native	Two or More Races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	American Indian or Alaskan Native		Two or More Races		
Chief Executive Officer	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1
Farm Labor Contractors	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
Financial Analysts	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
General Operations Manager	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1
Manager	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
Totals:	1	0	0	1	0	0	0	0	0	1	0	1	1	0	0	0	5

Export Options: Download to Excel, Download to CSV or Printer Friendly

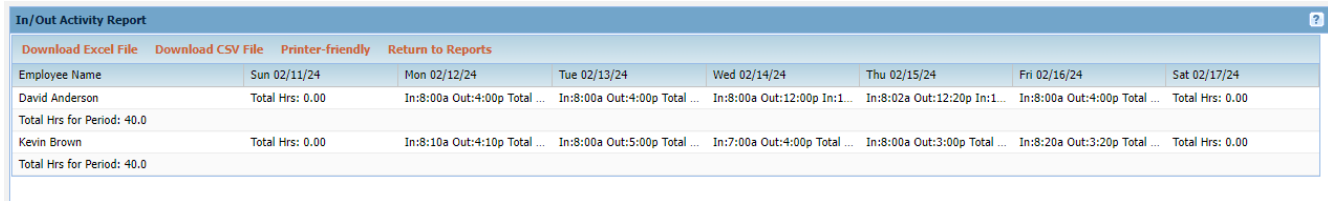
In/Out Activity Report

Requirements: In/Outs must be used on the timesheet (either manual or web/physical clock entry)

Input:



Output:



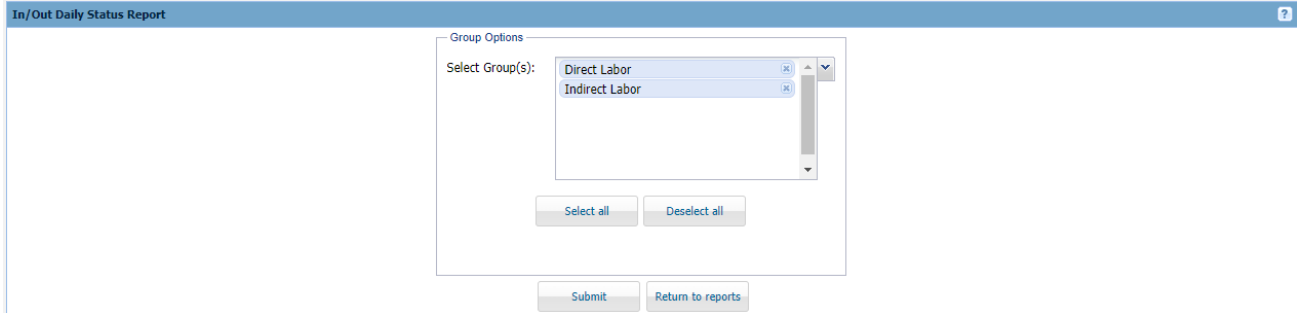
Employee Name	Sun 02/11/24	Mon 02/12/24	Tue 02/13/24	Wed 02/14/24	Thu 02/15/24	Fri 02/16/24	Sat 02/17/24
David Anderson	Total Hrs: 0.00	In:8:00a Out:4:00p Total ...	In:8:00a Out:4:00p Total ...	In:8:00a Out:12:00p In:1...	In:8:02a Out:12:20p In:1...	In:8:00a Out:4:00p Total ...	Total Hrs: 0.00
Total Hrs for Period: 40.0							
Kevin Brown	Total Hrs: 0.00	In:8:10a Out:4:10p Total ...	In:8:00a Out:5:00p Total ...	In:7:00a Out:4:00p Total ...	In:8:00a Out:3:00p Total ...	In:8:20a Out:3:20p Total ...	Total Hrs: 0.00
Total Hrs for Period: 40.0							

Export Options: Download to Excel, Download to CSV or Printer Friendly

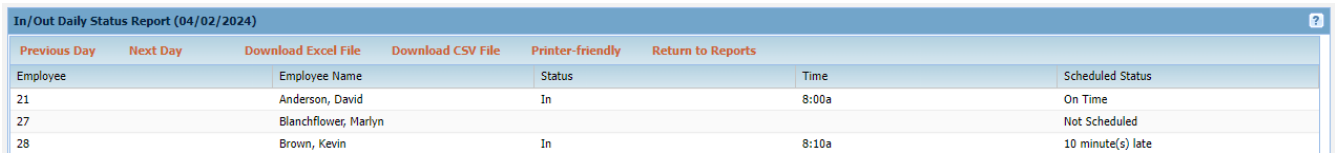
In/Out Daily Status Report

Requirements: none

Input:



Output:



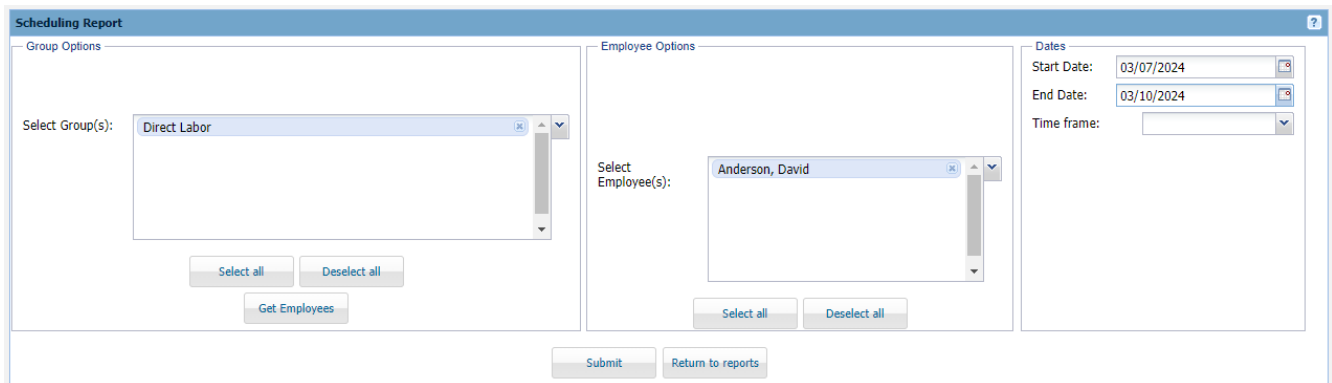
Employee	Employee Name	Status	Time	Scheduled Status
21	Anderson, David	In	8:00a	On Time
27	Blanchflower, Marilyn			Not Scheduled
28	Brown, Kevin	In	8:10a	10 minute(s) late

Export Options: Download to Excel, Download to CSV or Printer Friendly

Scheduled/Actual Hours Comparison Report

Requirements: Employee must have a schedule and in/outs on the timesheet

Input:



Output:

Scheduled vs. Actual Hours Comparison Report (03/07/2024 - 03/10/2024)				
Download Excel File Download CSV File Printer-friendly Return to Reports				
Employee	Date	Scheduled	Actual	
Anderson David	Thu 03/07/24	Total Hrs: 0.0	Total Hrs: 0.0	
Anderson David	Fri 03/08/24	In:8:00a Out:4:00p Charge Code : Task : Total Hrs: 8.0	In:08:00a Out:04:00p Charge Code : Task : Total Hrs: 8.0	
Anderson David	Sat 03/09/24	Total Hrs: 0.0	In:08:10a Out:04:10p Charge Code : Task : Total Hrs: 8.0	
Anderson David	Sun 03/10/24	Total Hrs: 0.0	Total Hrs: 0.0	
Anderson David	Total	8.0	16.0	

Export Options: Download to Excel, Download to CSV or Printer Friendly

Scheduled Overtime Report

Requirements: Employee must have a schedule

Input:

Scheduling Report
?

Group Options

Select Group(s):

Employee Options

Select Employee(s):

Dates

Start Date:

End Date:

Time frame:

Output:

Scheduled Overtime Report (03/25/2024 - 03/29/2024)

David Anderson								
Mon 03/25/24	Tue 03/26/24	Wed 03/27/24	Thu 03/28/24	Fri 03/29/24	Total	Reg	OT	DNE
Scheduled	Scheduled	Scheduled	Scheduled	Scheduled	Hours	Hours	Hours	Hours
In:7:00a Out:5:00p	In:7:00a Out:5:00p	In:7:00a Out:5:00p	In:7:00a Out:5:00p	In:8:00a Out:4:00p				
Break Time:0.0	Break Time:0.0	Break Time:0.0	Break Time:0.0	Break Time:0.0	48.0	40.0	8.0	40.0
Total Hrs: 10.0	Total Hrs: 10.0	Total Hrs: 10.0	Total Hrs: 10.0	Total Hrs: 8.0 Overtime Hrs: 8.0				

Supervisor Signature: _____

Date: _____

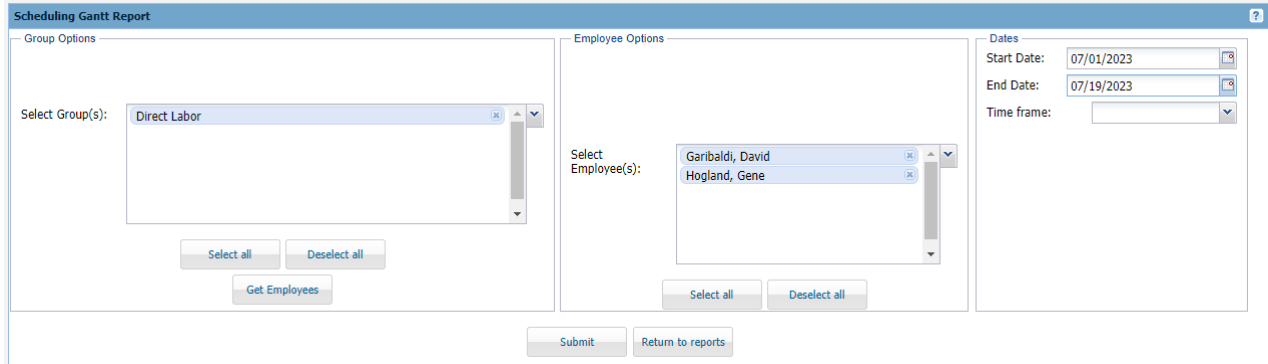
Privacy Act Information "This information is subject to the Privacy Act of 1974, (Title 5, USC 522a)"

Export Options: none

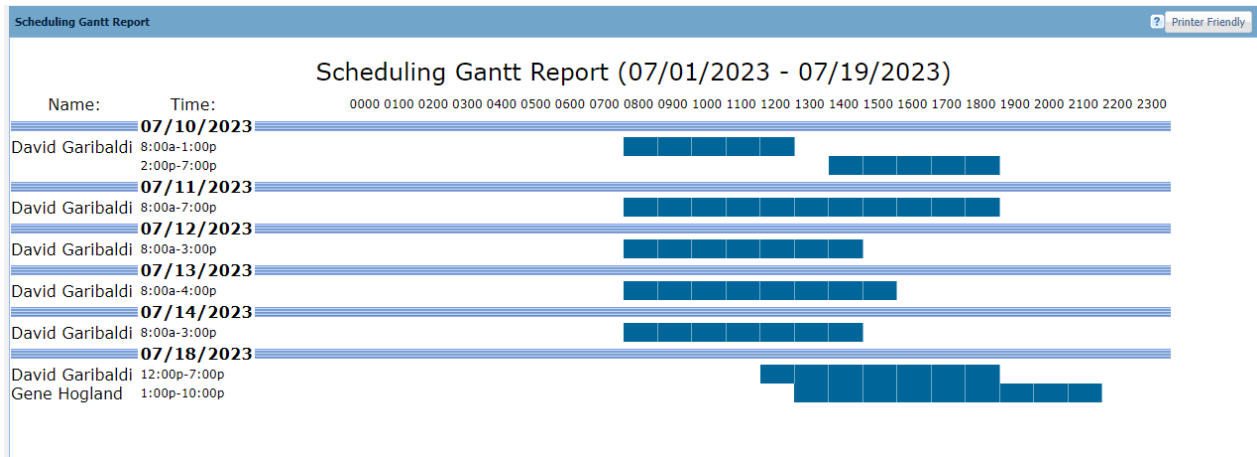
Schedule Gantt Report

Requirements: Employee must have a schedule

Input:



Output:

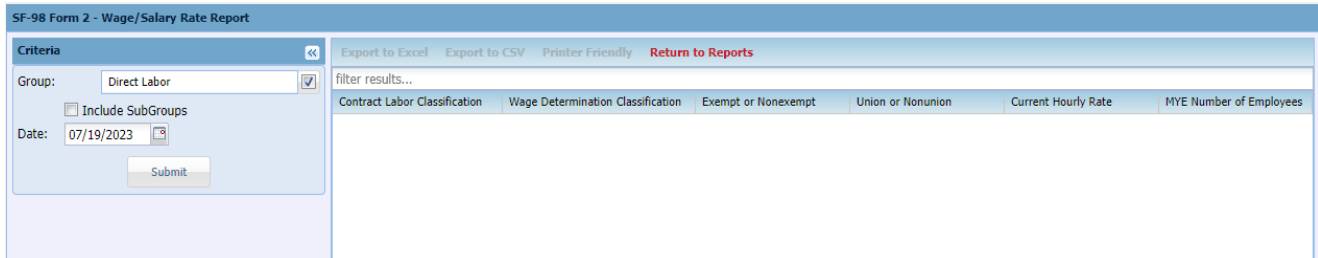


Export Options: Printer Friendly

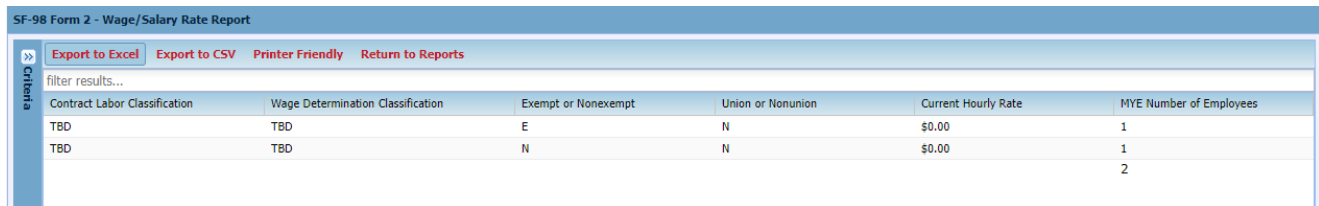
SF-98 Form 2 - Wage/Salary Rate Report

Requirements: Profile fields (union, exempt and compensation) must be filled out

Input:



Output:



Contract Labor Classification	Wage Determination Classification	Exempt or Nonexempt	Union or Nonunion	Current Hourly Rate	MYE Number of Employees
TBD	TBD	E	N	\$0.00	1
TBD	TBD	N	N	\$0.00	1
					2

Export Options: Download to Excel, Download to CSV or Printer Friendly

Import Employees

Administrators are able to create employees one at a time from Employee Management. However, this link allows the user to import a batch file of multiple employees. To create the file, open Excel and add the header columns listed below. Fill in the fields in the rows beneath the header.

Column Header	Description	Required?
A	Employee ID#	Yes
B	Device ID	
C	Username	Yes
D	Password	Yes
E	Prefix	
F	Last Name	Yes
G	First Name	Yes
H	Middle Initial	
I	Suffix	
J	Hire Date	Yes
K	Service Date	
L	Address1	
M	Address2	
N	City	
O	State	
P	Zip	
Q	Time Zone	
R	Country	
S	Gender	
T	Birthday	
U	Email	
V	Alt Email	
W	Login Type	Yes
X	Cell Ph#	

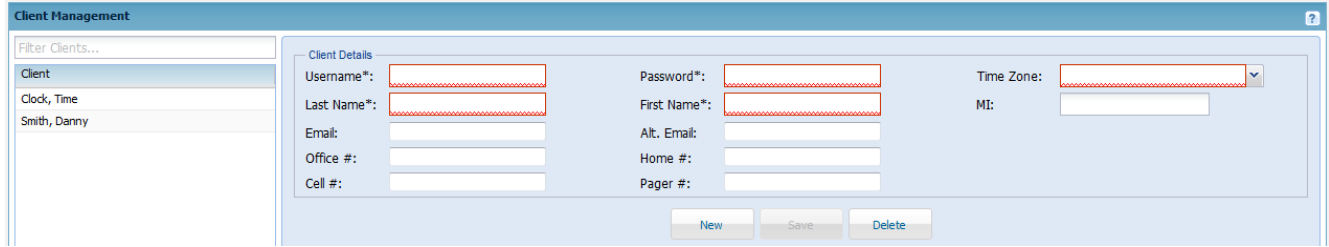
Y	Pager#	
Z	Office Ph#	
AA	Home Ph#	
AB	SSN	
AC	Citizenship	
AD	Imm Status	
AE	Imm Status Expire Date	
AF	Ethnicity	
AG	Exempt Status	Yes
AH	Organization	
AI	Employee Type	Yes
AJ	Emergency Contact	
AK	Emergency Contact Ph#	
AL	Office Location	
AM	Veteran Status	
AN	Disabled	
AO	Referring Employee	
AP	Union	
AQ	Termination Date	
AR	Group	
AS	Blank	
AT	Vendor Name	
AU	Job Title	

Save the spreadsheet as a .CSV and browse for the file for the Import Employees page. Click “Import” under the browse button.

Client Management

Clients are a limited access role that allows the user to only review, print and approve timesheets. They cannot edit or otherwise make changes to the timesheet data. User only has the Timesheet Review link and will only be able to see hours worked on the timesheet that are authorized charges in the group they are over.

Client Management allows an Administrator to create the username and password for the client. Additional fields are available if needed. If notifications are turned on for client’s to receive, an email address will need to be included on the profile.



Client Management

Filter Clients...

Client

Clock, Time

Smith, Danny

Client Details

Username*: Password*: Time Zone:

Last Name*: First Name*: MI:

Email: Alt. Email:

Office #: Home #:

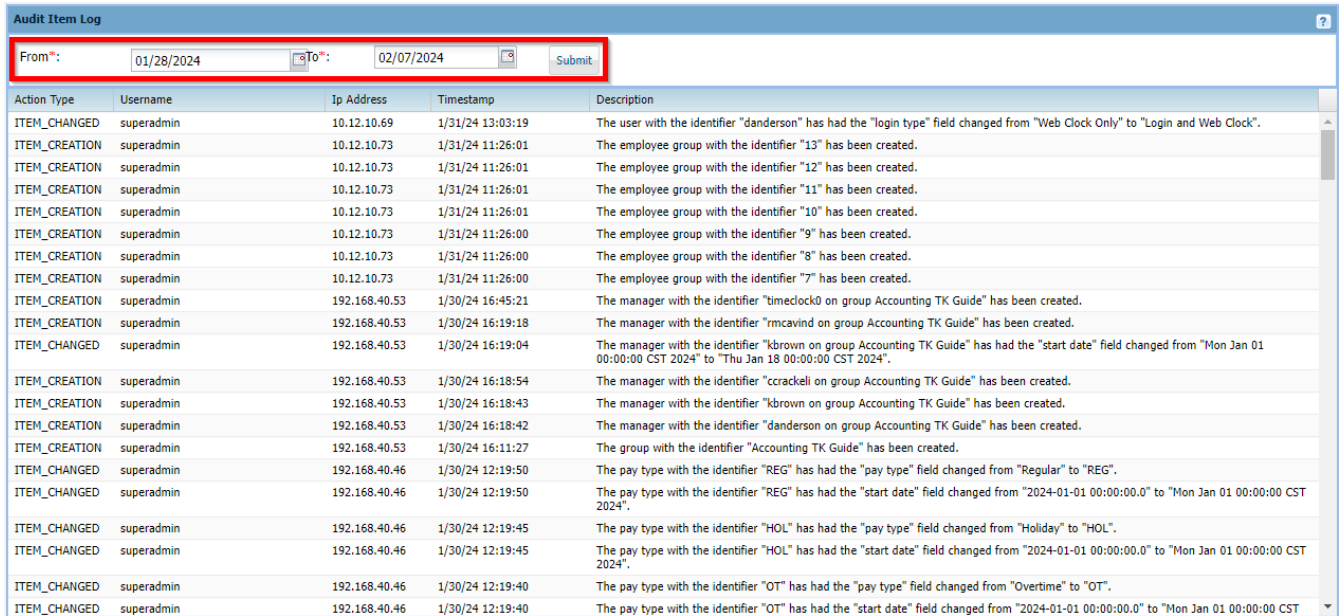
Cell #: Pager #:

New Save Delete

The client user does not have a start or end date option however once an end date is added to the client's group assignment, the user will not be able to view any timesheets.

Audit Item Log

Any changes or additions made to a TeamKeeper site is saved in the Audit Item Log and can be reviewed for accuracy. User is required to choose a start and end date to view the log then all items are displayed below.



Audit Item Log

From*: 01/28/2024 To*: 02/07/2024 Submit

Action Type	Username	Ip Address	Timestamp	Description
ITEM_CHANGED	superadmin	10.12.10.69	1/31/24 13:03:19	The user with the identifier "danderson" has had the "login type" field changed from "Web Clock Only" to "Login and Web Clock".
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:01	The employee group with the identifier "13" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:01	The employee group with the identifier "12" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:01	The employee group with the identifier "11" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:01	The employee group with the identifier "10" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:00	The employee group with the identifier "9" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:00	The employee group with the identifier "8" has been created.
ITEM_CREATION	superadmin	10.12.10.73	1/31/24 11:26:00	The employee group with the identifier "7" has been created.
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:45:21	The manager with the identifier "timeclock0 on group Accounting TK Guide" has been created.
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:19:18	The manager with the identifier "rmcavind on group Accounting TK Guide" has been created.
ITEM_CHANGED	superadmin	192.168.40.53	1/30/24 16:19:04	The manager with the identifier "kbrown on group Accounting TK Guide" has had the "start date" field changed from "Mon Jan 01 00:00:00 CST 2024" to "Thu Jan 18 00:00:00 CST 2024".
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:18:54	The manager with the identifier "ccrackeli on group Accounting TK Guide" has been created.
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:18:43	The manager with the identifier "kbrown on group Accounting TK Guide" has been created.
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:18:42	The manager with the identifier "danderson on group Accounting TK Guide" has been created.
ITEM_CREATION	superadmin	192.168.40.53	1/30/24 16:11:27	The group with the identifier "Accounting TK Guide" has been created.
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:50	The pay type with the identifier "REG" has had the "pay type" field changed from "Regular" to "REG".
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:50	The pay type with the identifier "REG" has had the "start date" field changed from "2024-01-01 00:00:00.0" to "Mon Jan 01 00:00:00 CST 2024".
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:45	The pay type with the identifier "HOL" has had the "pay type" field changed from "Holiday" to "HOL".
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:45	The pay type with the identifier "HOL" has had the "start date" field changed from "2024-01-01 00:00:00.0" to "Mon Jan 01 00:00:00 CST 2024".
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:40	The pay type with the identifier "OT" has had the "pay type" field changed from "Overtime" to "OT".
ITEM_CHANGED	superadmin	192.168.40.46	1/30/24 12:19:40	The pay type with the identifier "OT" has had the "start date" field changed from "2024-01-01 00:00:00.0" to "Mon Jan 01 00:00:00 CST 2024".

Notifications

TeamKeeper has the ability to send email notifications to all users based on their roles or actions within the site. Employees can receive reminders or alerts about their own timesheet or leave request while supervisors can be notified about any issues with their employees.

Email notifications can be accessed and configured by using the Administrator menu and choosing "Notifications" on the list. To turn them on, click the title of the reminder and "Enabled" in the menu to the right. Once enabled, you are able to choose the configuration options and save at the bottom.

Notes

- The scheduled sent time is based on the time zone configuration for the site - not the employee profile time zone.
- Email addresses must be saved on the employee profile and can be updated by Administrators or Employees.
- Managers and Backup Managers will only receive emails for the employees that are in the groups they are assigned over.

Configurable Options

- Emails sent to users can also be viewed and dismissed on the home page of the TeamKeeper site when they log in.
- The “From” address on the email can be changed to a company or easily recognizable address.
- Email send times and dates can be customized. For example, you could schedule the Timesheet Not Submitted email at 6pm the last day of the period and again the following morning.
- There is a feature that allows the manager of the group and of the parent group to receive notifications about all employees listed.

Please contact your setup representative or technical support to make any modifications listed above.

Scheduled Daily Timesheet Reminder

Daily Timesheet Reminder can be enabled for employee, manager and/or backup manager for any days of the week and/or weekend.

Notification trigger: if an employee does not have an entry (hours worked or leave) saved on their timesheet for that particular day

Recipient	Employee
Subject	Daily Timesheet Reminder
Email Body	You have not yet charged time for the following date: *TIMESHEET END DATE*. Please remember to charge your hours daily.
Recipient	Manager
Subject	Daily Timesheet Reminder
Email Body	Employee: *EMPLOYEE NUMBER* - *LAST NAME* *FIRST NAME* has not yet charged time for date: *TIMESHEET END DATE*.

Recipient	Backup Manager
Subject	Daily Timesheet Reminder
Email Body	Employee: *EMPLOYEE NUMBER* - *LAST NAME* *FIRST NAME* has not yet charged time for date: *TIMESHEET END DATE*.

Timesheet Acknowledged

Notification trigger: a manager has opened the timesheet but not approved. There is an advanced configuration setting that must be turned on for this email to send.

Recipient	Employee
Subject	Timesheet Acknowledged
Email Body	Your timesheet ending date *TIMESHEET END DATE* has been acknowledged.

Employee Timesheet Ready for Approval

Notification trigger: employee clicks "Submit" on the timesheet

Recipient	Manager
Subject	Employee Timesheet Ready for Approval
Email Body	Timesheet ending date *TIMESHEET END DATE* for employee *FIRST NAME* *LAST NAME* is ready for approval.

Recipient	Backup Manager
Subject	Employee Timesheet Ready for Approval
Email Body	The timesheet with an ending date of *TIMESHEET END DATE* for employee *FIRST NAME* *LAST NAME* is ready for approval.

Timesheet Export Service Finished

Notification trigger: timesheets export file is finished exporting

Recipient	Accountant
Subject	Timesheet Export Service Finished
Email Body	Timesheet Export Service finished at *TIMESHEET EXPORT TIME* with following results. *TIMESHEET EXPORT RESULT*

Timesheet Export Service Started

Notification trigger: user with accountant role has submitted the page to create the export file

Recipient	Accountant
Subject	Timesheet Export Service Started
Email Body	Timesheet Export Service started at *TIMESHEET EXPORT TIME*

Employee Reaches Overtime Threshold

Notification trigger: employee timesheet contains enough hours to go over the threshold

Recipient	Manager
Subject	Employee Reached Overtime Threshold
Email Body	Employee *FIRST NAME* *LAST NAME* has reached the threshold of overtime.

Recipient	Backup Manager
Subject	Employee Reached Overtime Threshold
Email Body	Employee *FIRST NAME* *LAST NAME* has reached the threshold of overtime.

Employee Submit Timesheet

Notification trigger: employee clicks “Submits” on the timesheet

Recipient	Manager
Subject	Timesheet Submitted
Email Body	Employee *FIRST NAME* *LAST NAME* submitted timesheet. Timesheet ending date *TIMESHEET END DATE*.

Recipient	Backup Manager
Subject	Timesheet Submitted
Email Body	Employee *FIRST NAME* *LAST NAME* submitted a timesheet. The timesheet has an ending date of *TIMESHEET END DATE*.

Recipient	Client
Subject	Timesheet Submitted
Email Body	Employee *FIRST NAME* *LAST NAME* submitted timesheet. Timesheet ending date *TIMESHEET END DATE*.

Timesheet Approved

Notification trigger: manager or client clicks “Approve” on the employee’s timesheet

Recipient	Employee
Subject	Timesheet Approved
Email Body	Timesheet ending date *TIMESHEET END DATE* has been approved.

Recipient	Client
Subject	Timesheet Approved
Email Body	Timesheet for *FIRST NAME* *LAST NAME* with ending date *TIMESHEET END DATE*

	DATE* has been approved.
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Timesheet Resubmitted

Notification trigger: timesheet has previously been submitted, unsubmitted then resubmitted

Recipient	Manager
Subject	Timesheet Resubmitted
Email Body	Employee *FIRST NAME* *LAST NAME* resubmitted timesheet. Timesheet ending date *TIMESHEET END DATE*.

Recipient	Backup Manager
Subject	Timesheet Resubmitted
Email Body	Employee *FIRST NAME* *LAST NAME* resubmitted a timesheet. The timesheet has an ending date of *TIMESHEET END DATE*.

Recipient	Client
Subject	Timesheet Resubmitted
Email Body	Employee *FIRST NAME* *LAST NAME* resubmitted timesheet. Timesheet ending date *TIMESHEET END DATE*.

Timesheet Unsubmitted

Notification trigger: user unsubmitted their own timesheet or their employee's timesheet

Recipient	Employee
Subject	Timesheet Unsubmitted
Email Body	The timesheet belonging to *FIRST NAME* *LAST NAME* with ending date *TIMESHEET END DATE*

Recipient	Manager
Subject	Timesheet Unsubmitted
Email Body	The timesheet belonging to *FIRST NAME* *LAST NAME* with ending date *TIMESHEET END DATE*

Recipient	Backup Manager
Subject	Timesheet Unsubmitted
Email Body	The timesheet belonging to *FIRST NAME* *LAST NAME* with ending date *TIMESHEET END DATE*

Recipient	Client
Subject	Timesheet Unsubmitted

Email Body	The timesheet belonging to *FIRST NAME* *LAST NAME* with ending date *TIMESHEET END DATE*
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Timesheet Not Submitted

Notification trigger: employee has not submitted the timesheet before the creation of the next timesheet period

Recipient	Employee
Subject	Timesheet Not Submitted
Email Body	You have not submitted last week Timesheet. Please submit your timesheet as soon as possible.

Recipient	Manager
Subject	Employee Did Not Submit Timesheet
Email Body	Following employee(s) have not submitted their timesheets for the last week. *EMPLOYEE NAME*

Recipient	Backup Manager
Subject	Employee Did Not Submit Timesheet
Email Body	The following employee(s) have not submitted their timesheets for the last week. *EMPLOYEE NAME*

Recipient	Client
Subject	Employee Did Not Submit Timesheet
Email Body	Following employee(s) have not submitted their timesheets for the last week. *EMPLOYEE NAME*

Recipient	Timekeeper
Subject	Employee Did Not Submit Timesheet
Email Body	Following employee(s) have not submitted their timesheets for the last week. *EMPLOYEE NAME*

TS Updated By Someone Other Than Employee

Notification trigger: a user (that is not the employee) has made a change (edit hours worked/leave or added a comment) to a timesheet that is not their own

Recipient	Employee
Subject	Timesheet Is Update...
Email Body	Timesheet ending date *TIMESHEET END DATE* has been updated by *FIRST NAME* *LAST NAME*.

Timesheet Corrected

Notification trigger: after a timesheet has been processed, the Correction button will appear and the notification is sent once the employee or supervisors creates the correction timesheet

Recipient	Employee
Subject	Timesheet Correction Created
Email Body	A correction has been created for *FIRST NAME* *LAST NAME* timesheet. Timesheet ending date *TIMESHEET END DATE*.
Recipient	Manger
Subject	Timesheet Correction Created
Email Body	A correction has been created for *FIRST NAME* *LAST NAME* timesheet. Timesheet ending date *TIMESHEET END DATE*.

Recipient	Backup Manager
Subject	Timesheet Correction Created
Email Body	A correction timesheet has been created for *FIRST NAME* *LAST NAME*. The ending date for the timesheet is *TIMESHEET END DATE*.

Recipient	Client
Subject	Timesheet Correction Created
Email Body	A correction has been created for *FIRST NAME* *LAST NAME* timesheet. Timesheet ending date *TIMESHEET END DATE*.

Timesheet Rejected

Notification trigger: supervisor rejects an employee's timesheet

Recipient	Employee
Subject	Timesheet Rejected
Email Body	Timesheet ending date *TIMESHEET END DATE* has been rejected.

Paystub Withdraw Consent

Notification trigger: employee clicks the link to withdraw consent

Recipient	Accountant
Subject	Pay Stub Consent Withdraw
Email Body	*FIRST NAME* *LAST NAME* employee NO.: *EMPLOYEE NUMBER*- has withdrawn his/her consent for online accessing of pay stub.

Recipient	Employee
Subject	Pay Stub Consent Withdraw

Email Body	*PAYSTUB WITHDRAW MESSAGE*-Your consent has been withdrawn to view your pay stub online. If you have any question please send an email to *CONTACT EMAIL*Thanks.
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Paystub Accept Consent

Notification trigger: employee clicks the link to consent to electronic viewing of pay stubs

Recipient	Accountant
Subject	Pay Stub Accept Consent
Email Body	*FIRST NAME* *LAST NAME* employee NO.: *EMPLOYEE NUMBER*-has consented to view pay stub electronically.

Recipient	Employee
Subject	Pay Stub Accept Consent
Email Body	If you wish to revoke your consent, click the Withdraw Consent link on your pay stub screen. If you have any questions, please send an email to *CONTACT EMAIL*

Employee Import Service Errored

Notification trigger: there is an error in the import file and not all records were imported

Recipient	Administrator
Subject	Employee Import Service Errored
Email Body	Some errors occurred during the employee import. Please check error log for details.

Employee Paystub Posted

Notification trigger: accountant has posted pay stubs and user has consented to see them online

Recipient	Employee
Subject	Your pay stub has been posted
Email Body	Your pay stub for the last pay period has been posted and it is ready for you to view.

Employee Password Changed

Notification trigger: employee clicks "Forgot Password" link on the login page

Recipient	Employee
Subject	Your New Password Setup
Email Body	Your temporary password is *TEMP PASSWORD*. Please change your password at first login.

Employee Personal Information Changed

Notification trigger: employee or other user has changed a field on the profile

Recipient	Employee
Subject	Personal Information Changed
Email Body	Your personal information has been changed in the database. The following field(s) were modified: *PROFILE FIELD(S)*.

Recipient	Manager
Subject	Employee Personal Information Changed
Email Body	Employee *FIRST NAME* *LAST NAME* personal information has been changed in the database. The following field(s) were modified: *PROFILE FIELD(S)*.

Recipient	Backup Manager
Subject	Employee Personal Information Changed
Email Body	Employee *FIRST NAME* *LAST NAME* personal information has been changed in the database. The following field(s) were modified: *PROFILE FIELD(S)*.

Recipient	Human Resources
Subject	Employee Personal Information Changed
Email Body	Employee *FIRST NAME* *LAST NAME* personal information has been changed in the database. The following field(s) were modified: *PROFILE FIELD(S)*.

Assign Role to Employee

Notification trigger: administrator gives additional access to a user

Recipient	Employee
Subject	New Role Assigned
Email Body	A new role: *ROLE* has been assign to you on *TODAY DATE*.

New Employee Added

Notification trigger: administrator has created a new profile

Recipient	Human Resources
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Subject	New Employee Added
Email Body	A new employee was added to the database on *TODAY DATE*. Employee Name: *FIRST NAME* *LAST NAME* and employee number: *EMPLOYEE NUMBER*.

W-2 Withdraw Consent

Notification trigger: employee clicks the link to withdraw consent

Recipient	Accountant
Subject	W-2 Consent Withdraw
Email Body	*FIRST NAME* *LAST NAME* employee NO.: *EMPLOYEE NUMBER*- has withdrawn his/her consent for online accessing of W-2 form(s).

Recipient	Employee
Subject	W-2 Consent Withdraw
Email Body	*W2 WITHDRAW MESSAGE*-Your consent has been withdrawn to access your W-2 form(s) online. You will now receive a paper W-2 Form in the mail. If you have any question please send an email to *CONTACT EMAIL*Thanks.

W-2 Accept Consent

Notification trigger: employee clicks the link to consent to electronic viewing of W-2 forms

Recipient	Accountant
Subject	W-2 Accept Consent
Email Body	*FIRST NAME* *LAST NAME* employee NO.: *EMPLOYEE NUMBER*-has consented to receive W-2 form electronically.

Recipient	Employee
Subject	W-2 Accept Consent
Email Body	*W2 ACCEPT MESSAGE*-Your consent was given to receive your W-2 Form electronically. You will no longer receive a paper copy of your W-2. To view your form login to the website and select W-2 Form from the Employee menu. If you wish to revoke your consent, click the Withdraw Consent link on your W-2 year list screen. If you have any questions, please send an email to *CONTACT EMAIL*.

New Org Added

Notification trigger: accountant adds a new Organization

Recipient	Accountant
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Subject	New Organization Added
Email Body	A new organization: *ORGANIZATION* - added to the database on *TODAY DATE*.

New Group Added

Notification trigger: accountant or administrator adds a new group

Recipient	Accountant
Subject	New Group Added
Email Body	A new group: *GROUP DESCRIPTION* - added to the database on *TODAY DATE*.

New Charge Code Added

Notification trigger: accountant adds a new charge code

Recipient	Accountant
Subject	New Charge Code Added
Email Body	A new charge code: *CHARGE CODE* - added to the database on *TODAY DATE*.

Employee Leave Request Update

Notification trigger: supervisor or timekeeper approves or rejects a leave request

Recipient	Employee
Subject	Your Leave Request Updates
Email Body	Your leave request for *NUMBER* hours of *LEAVE TYPE* leave *START DATE* and ending on *END DATE* has been *STATUS*

Employee Submit Request for Leave

Notification trigger: employee fills out and submits the request leave form

Recipient	Manager
Subject	Employee Request for Leave
Email Body	Employee *EMPLOYEE NAME* has submitted a request for *NUMBER* hours of *LEAVE TYPE* leave *START DATE* and ending on *END DATE*

Recipient	Backup Manager
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Subject	Employee Request for Leave
Email Body	Employee *EMPLOYEE NAME* has submitted a request for *NUMBER* hours of *LEAVE TYPE* leave *START DATE* and ending on *END DATE*

Recipient	Schedule Manager
Subject	Employee Request for Leave
Email Body	Employee *EMPLOYEE NAME* has submitted a request for *NUMBER* hours of *LEAVE TYPE* leave *START DATE* and ending on *END DATE*

Leave Service Failed

Notification trigger: leave accruals are not posted correctly

Recipient	Administrator
Subject	Leave Service Failed
Email Body	Leave Service Failed - *LEAVE SERVICE FAILURE MESSAGE*

Leave Service Success

Notification trigger: leave accruals are posted correctly

Recipient	Administrator
Subject	Leave Service Success
Email Body	Leave Service Ran Successfully - *LEAVE SERVICE SUCCESS MESSAGE*

Leave Accrual Maximum Reached

Notification trigger: employee's leave balance has met the maximum amount and will not be able to accrue until some hours are taken

Recipient	Employee
Subject	Reached The Maximum Accrual Amount
Email Body	You have reached the maximum accrual amount for leave *LEAVE NAME*.

Recipient	Manager
Subject	Employee Reached The Maximum Accrual Amount
Email Body	Employee *EMPLOYEE NAME* has reached the maximum accrual amount for leave *LEAVE NAME*.
Recipient	Backup Manager
Subject	Employee Reached The Maximum Accrual Amount
Email Body	Employee *EMPLOYEE NAME* has reached the maximum accrual amount for leave *LEAVE NAME*.

Employee Schedule Missing

Notification trigger: employee does not have a schedule posted

Recipient	Manager
Subject	Employee Schedule Missing
Email Body	Employee *EMPLOYEE NAME* scheduling is missing on *TODAY DATE*.

Recipient	Backup Manager
Subject	Employee Schedule Missing
Email Body	Employee *EMPLOYEE NAME* scheduling is missing on *TODAY DATE*.

Company Documents – Document Category

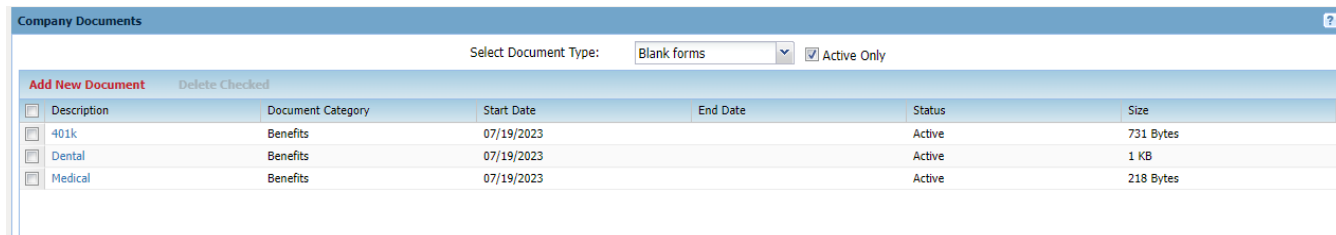
Site administrators have the ability to add files to a document repository for all users to access. These documents will be viewed or downloaded from the General menu tab which is available to any user. Before files can be uploaded, the document category has to be created. Think of this as a way to organize and file your documents.

From the Administrator drop down menu, hover over Company Documents and click the link “Documents Category”. At the top of the page, click “Add New Category”.



Category Description	Document Type
<input type="checkbox"/> Benefits	Blank forms

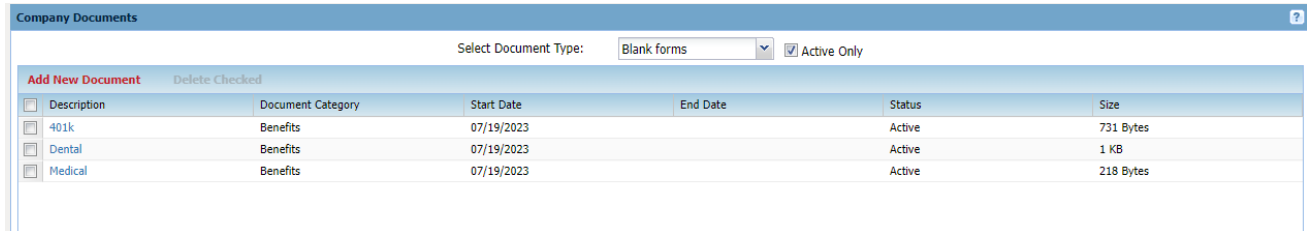
Enter the name of the new category and choose the type from the drop down list. After filling in the required fields, click “Update”.



Description	Document Category	Start Date	End Date	Status	Size
<input type="checkbox"/> 401k	Benefits	07/19/2023		Active	731 Bytes
<input type="checkbox"/> Dental	Benefits	07/19/2023		Active	1 KB
<input type="checkbox"/> Medical	Benefits	07/19/2023		Active	218 Bytes

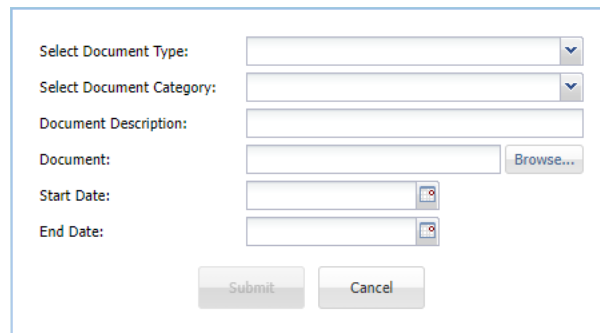
Company Documents – Document List

Once your categories are created, navigate to the link from Company Documents and click “Document List”. You will see all documents available, their category, size and status. To add a new document, click the link at the top of the header “Add New Document”.



Company Documents						
		Select Document Type: Blank forms		<input checked="" type="checkbox"/> Active Only		
Add New Document Delete Checked						
Description	Document Category	Start Date	End Date	Status	Start Date	Size
<input type="checkbox"/> 401k	Benefits	07/19/2023		Active		731 Bytes
<input type="checkbox"/> Dental	Benefits	07/19/2023		Active		1 KB
<input type="checkbox"/> Medical	Benefits	07/19/2023		Active		218 Bytes

After filling in the required fields, browse for the document and click “Submit”. The document will then be posted for all users to access.



Select Document Type: ▼
 Select Document Category: ▼
 Document Description:
 Document:
 Start Date:
 End Date:

General Menu Items

The General tab is given to all users and the links included might reflect the level of permissions you have been assigned.

Employee Roster

This link will allow you to search for an employee or choose to View All in the group drop down. You must have the employee roll to see this link. After submitting the form, the results will show contact information for all active employees. From the results page, you can select Printer Friendly for better formatting.

Blank Forms and Newsletters

Administrators have the option to upload any form employees might need to access. Please note that you are able to view, download and print these forms but you will not have the ability to upload any forms from the General tab. One option would be to print/save to PDF and attach to your timesheet. Unlike Blank Forms, there is no category to choose from for Newsletter.

Help Desk

Users with additional permissions, like Administrator, will be able to view the Help Desk option under the General menu. Technical support is available via phone, email or live chat. A support representative will ask you the name of the company as well as your name. If you are not an authorized contact for your account, you will be asked to get in touch with one of them so you can be given permission to make changes to the configuration or data.