# Supervisor User Guide

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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 Supervisors will have access to and how to do everything necessary to manage your employee's timesheets and leave requests. Supervisor is just one role inside of TeamKeeper so you might have it in addition to other roles like Employee or Scheduler.

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.

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#

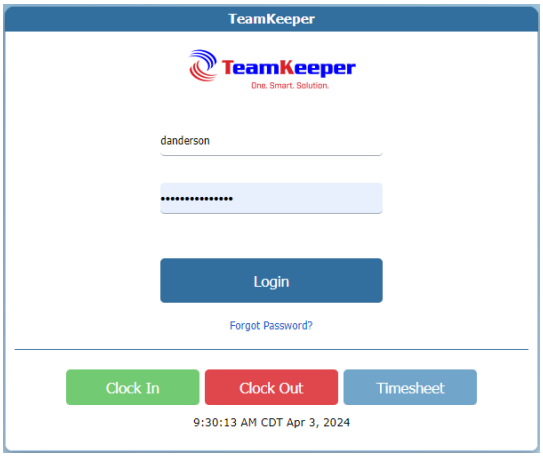
## Requirements

The following is required to access the electronic timesheet system:

- Current Internet Browser
  - Internet Explorer 7.0 or greater
  - Mozilla Firefox
  - Chrome
  - Safari
- Internet Access
- Valid Username and Password

For Supervisor access, you must login (using the web clock 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)




## Supervisor vs Timekeeper

The best way to assign the Supervisor role is by going to Group Management and assigning the user as an Active Manager over a group. A Timekeeper will also need to be assigned over a group; however, they will not be able to approve employee timesheets. Supervisors and Timekeepers will only receive notifications for the employees that are in their group. Besides timesheet approval, the roles are almost identical.

SUPERVSIOR MENU AND PERMISSIONS

| | Supervisor | Timekeeper |
|---|---|---|
| Review Timesheet | VIEW/EDIT/APPROVE | VIEW/EDIT |
| Mass In/Out Update | X | X |
| Leave Balance Report | X | X |
| Manage Leave Requests | VIEW/APPROVE | VIEW/APPROVE |
| Employee Management | X | X |
| Employee Authorized Charges | X | X |
| View Multiple Timesheets | X | X |
| Import Employee Schedules | X | X |
| Mass Timesheet Update | X | X |

User must be assigned to a group, not just given the role from Employee Management

## 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 is a news feed section 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 blue menu bars.

The role of supervisor has a great added tool so that you can quickly move to an employee's information or timesheet. 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.

## Supervisor Menu Items

Review Timesheet – Supervisors will use this link to view, edit and approve employee timesheets

Mass In/Out Update – Automatically place in or out punches for each employee by Group for specific days. Also allows for comments as to why the manual punch was needed in the first place

Leave Balance Report – Displays all types of assigned leave for all employees in the supervisors group

Manage Leave Requests – When employees submit a leave request, supervisors and timekeepers will be able to track and approve the form

Employee Management – View and edit the employee's profile as well as manage the codes allowed on their timesheet

Employee Authorized Charges – Besides viewing the employee's profile, you can assign or end authorized charges and tasks employees use on their timesheet

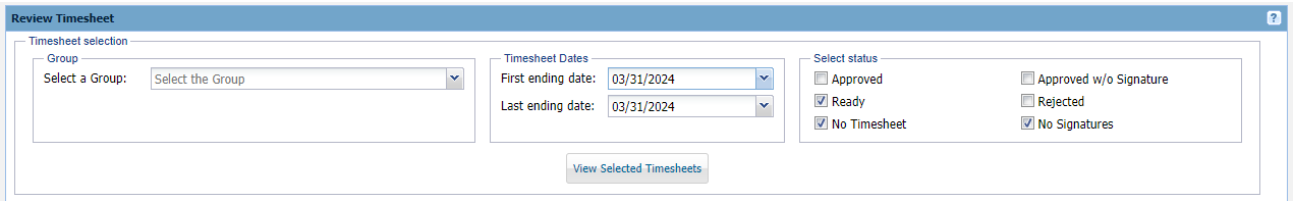
View Multiple Timesheets – Quick way to print timesheets for a large group of employees or for a large date range

Import Employee Schedules – Schedules can be imported daily, weekly, or by pay period for employees associated to the supervisors group.

Mass Timesheet Update – Similar to Mass In/Out Update but for hours or money pay types. This can be used for inclement weather, holidays or shift differential.

## Review Timesheet

Use Review Timesheet to manage (review, edit, create, approve or reject) an employee's timesheet. There are several options for filtering employee timesheet data.




The group selection dropdown will help you narrow down the employee timesheets that will display. Timesheet Dates will default to the current period but they can easily be changed to view historical data or even a wide range of timesheet end dates. Certain status options will be selected by default but more can be chosen.

## Status Options

Approved - Timesheet that has been signed by both an employee and a supervisor

Ready - Timesheet that has been signed by the employee ONLY (Ready for the supervisor to sign)

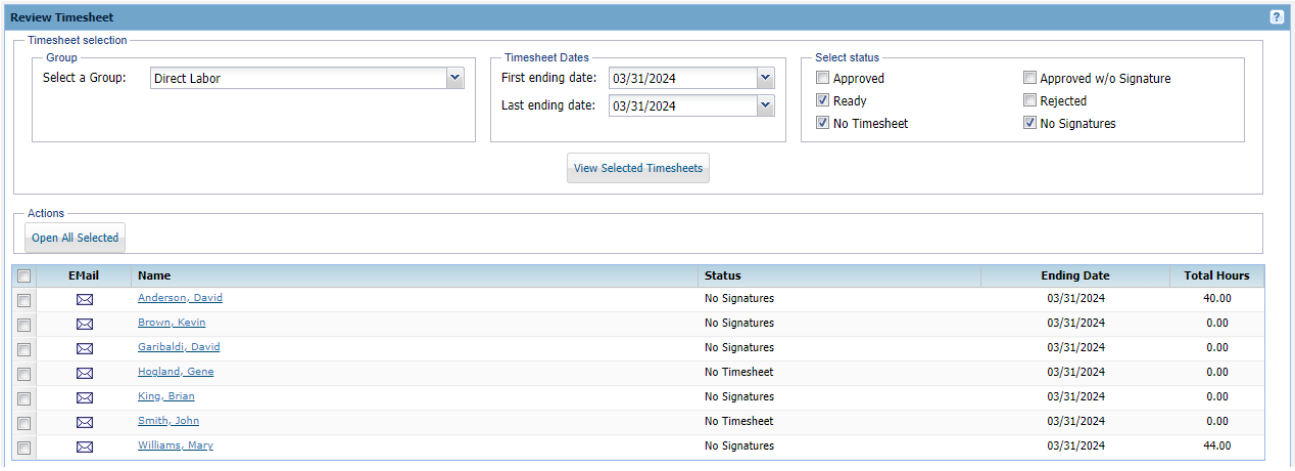
No Timesheet - no data exist for the given period for the selected employee. The employee has not yet opened or entered any data on the identified timesheet

Approved w/o Signature - Supervisor has approved the timesheet without the employee's signature

Rejected - Timesheet was originally signed by the employee but rejected by the supervisor

No Signature - Timesheet is active but does not contain either a supervisor's approval or an employee's submittal

After choosing the group, timesheet dates and status options, click “View Selected Timesheets”.

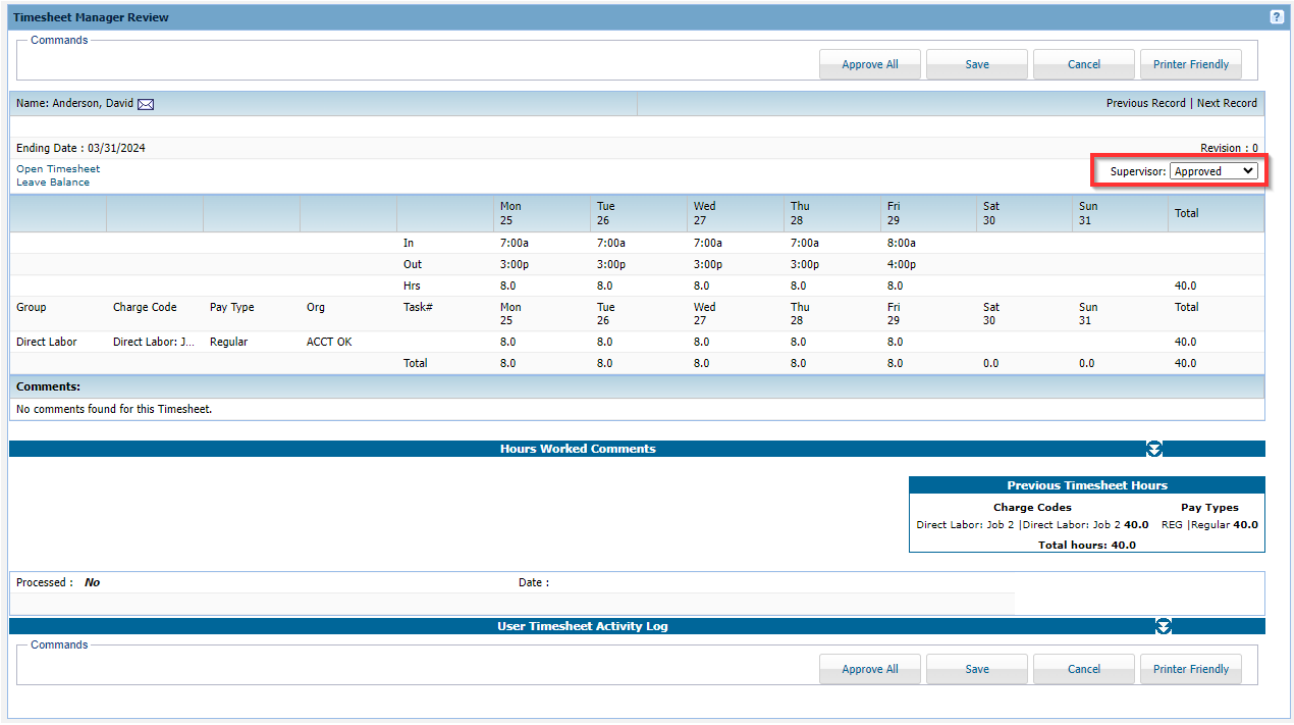


## Approving a Timesheet

Once the appropriate timesheets are displayed in the list, there are two ways to open the selected records:

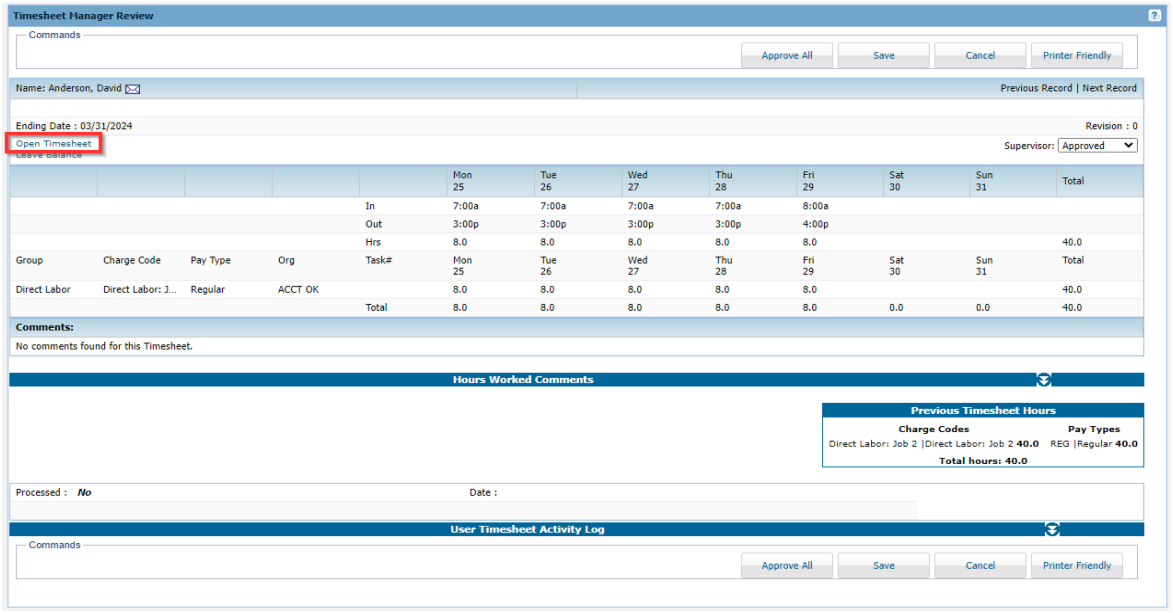
1. To open a single timesheet, click on the name of the employee and the selected timesheet will be displayed
2. If multiple timesheets need to be reviewed, then place a check in the appropriate boxes and click the “Open all Selected” button

If the timesheet has been signed by the employee, the Supervisor will have the ability to Approve, Unsubmit or Reject. If the timesheet has not been signed, the Supervisor can only Approve. Select the appropriate action in the Supervisor dropdown box (approve, un-submit or reject) then hit the Save button at the top. If multiple timesheets are selected, they can each have a different status and will save based on what is chosen.



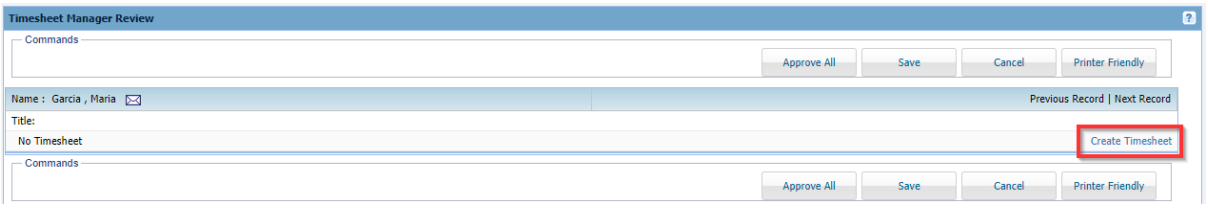

## Opening a Timesheet

If a timesheet needs closer review or to be edited, from the Timesheet Manager Review page, click the “Open Timesheet” link under the employee’s name.




## Creating a New Timesheet

From the Review Timesheet selection page, choose the employee with the status “No Timesheet”. Once you open the view, you are given the option to “Create Timesheet”. By clicking the link, the Supervisor starts the timesheet and can choose from all of the authorized charges that are assigned to the employee for that period. After creating the timesheet, the Supervisor can approve or just save the timesheet. All activity is recorded in the activity log with the Supervisors username and IP address.



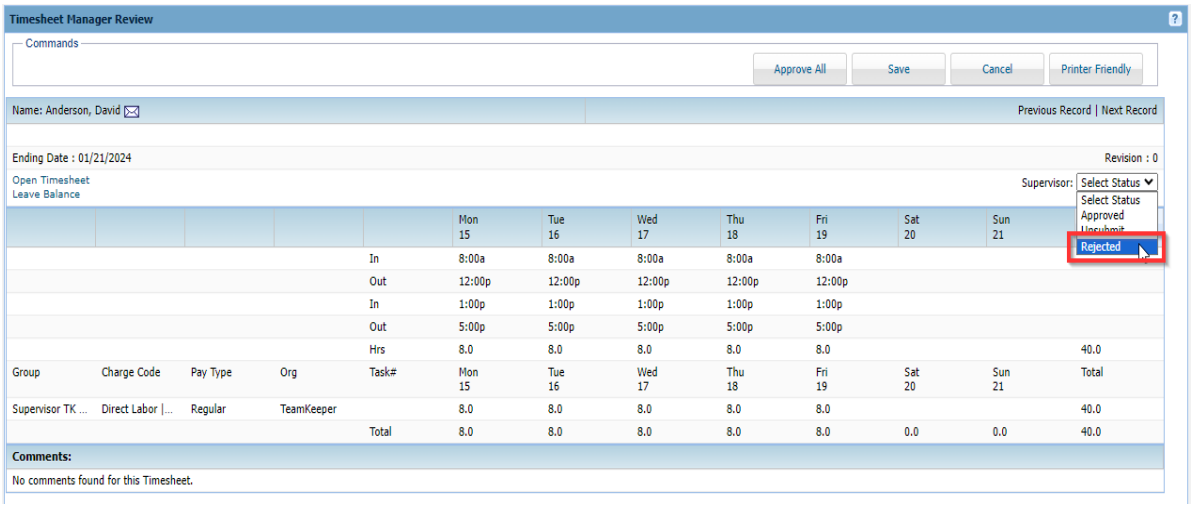

## Editing a Timesheet

If the timesheet has been signed by the employee, the Supervisor will have to Unsubmit. Once the signature is removed, the timesheet becomes editable again. After the Supervisor opens the timesheet and makes the changes, the Supervisor can Approve the timesheet before or after the employee resigns. Supervisors are also able to leave timesheet comments documenting the recent changes. All activity is recorded in the activity log with the Supervisors username and IP address.

## Rejecting a Timesheet

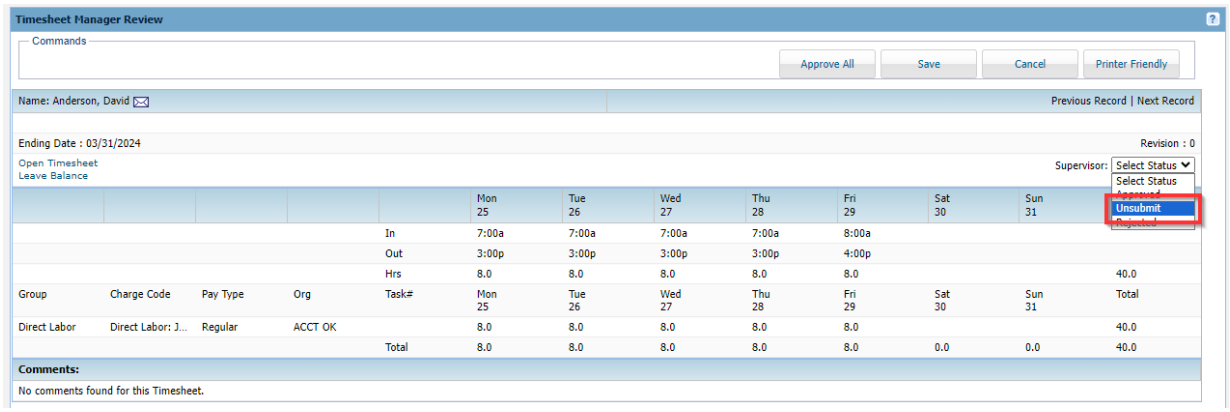
Supervisors will only have the option to reject a timesheet if it has been signed by the employee. The difference between Reject and Unsubmit is that there is a status filter on the Review Timesheet for Rejected as well as a different email notification that can separately be configured.

To reject, choose “Rejected” on the Supervisor status on the Timesheet Manager Review page.

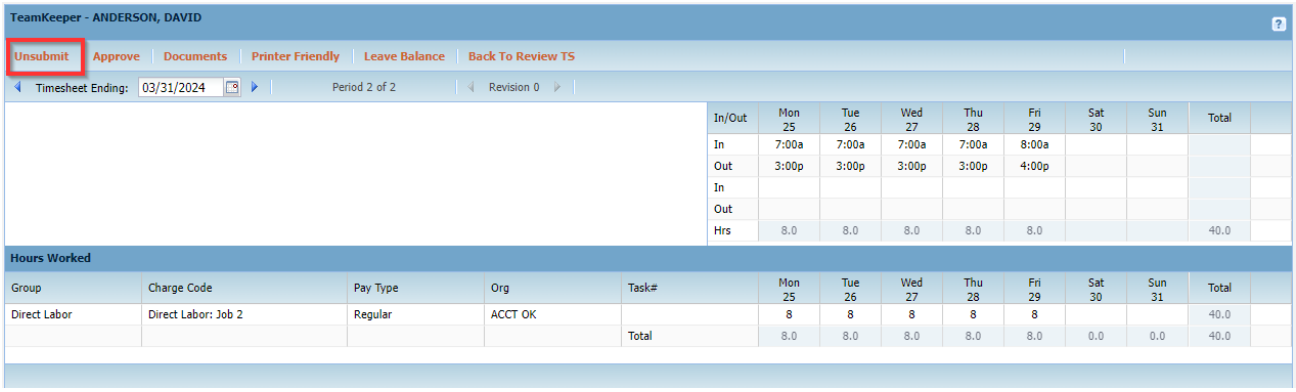



## Unsubmitting a Timesheet

Once the employee signs and the Supervisor approves, the employee is no longer able to unsubmit or make any changes. To reopen the timesheet, the Supervisor will have to remove their signature by Unsubmitting. To unsubmit, choose “Unsubmit” on the Supervisor status on the Timesheet Manager Review page.

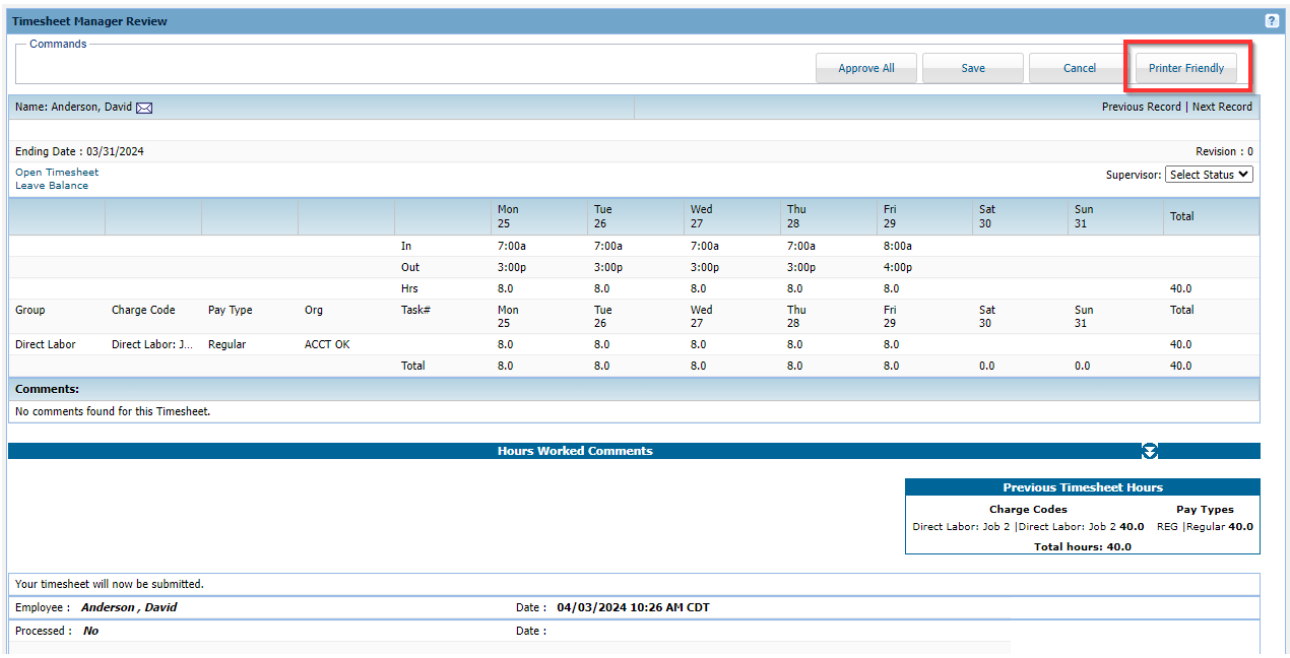



If the timesheet is opened, there will be an Unsubmit button at the top of the page.




## Printing Timesheets

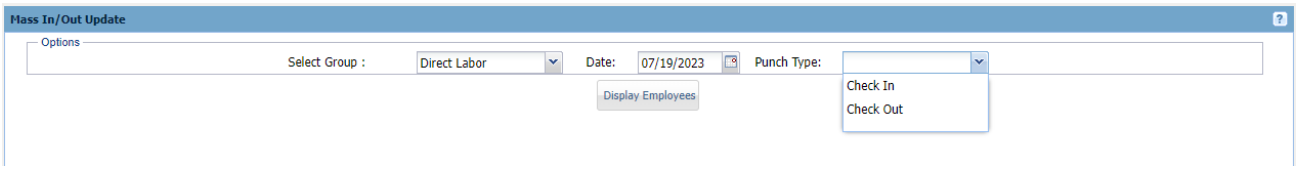
Once the timesheet(s) are chosen from the Review Timesheet selection page, they will display in a limited view. At the top of the page, click “Printer Friendly” for a PDF view of in/outs (if applicable), hours worked rows, comments including hours worked and timesheet, signatures, and activity log.



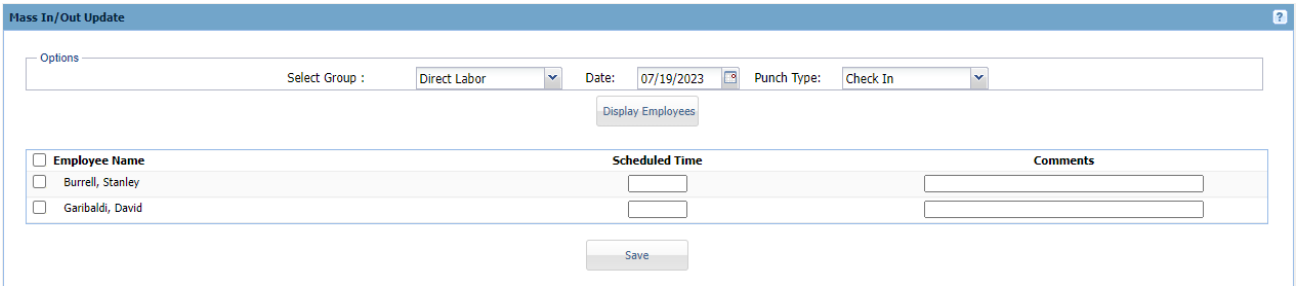

## Mass In/Out Update

The Mass In/Out update option allows a supervisor to post in and/or out times to multiple timesheets from one page. Use the dropdown options to choose your group, date, and punch

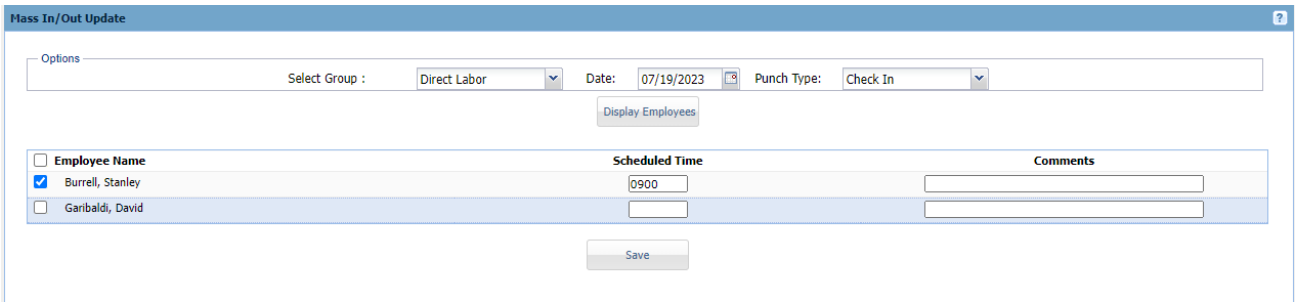
type. Timesheet must be unsigned and not approved for an in or out time to be posted to the timesheet.



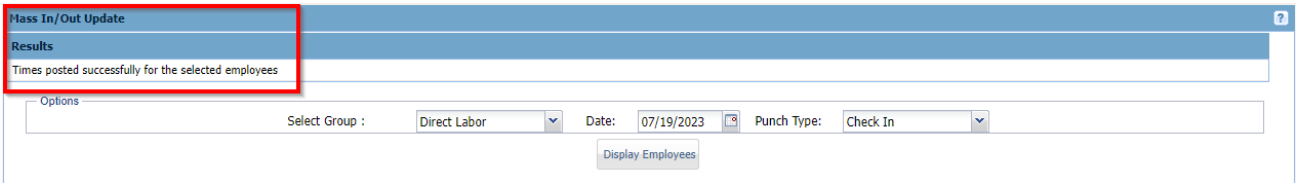

If the employee has a schedule, their scheduled in or out time will be posted. You can remove the time and enter the new in or out time. Comments are optional.




Make sure to select the checkbox beside at least one employee and enter the hours in either standard or military time.

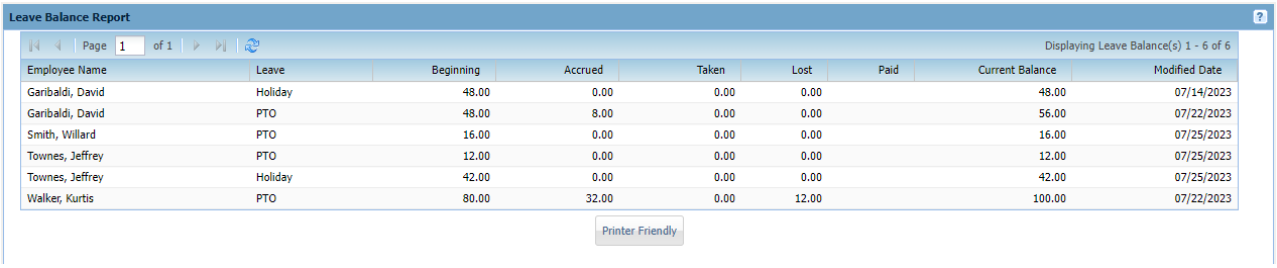



When you click “Save” a confirmation message will appear.

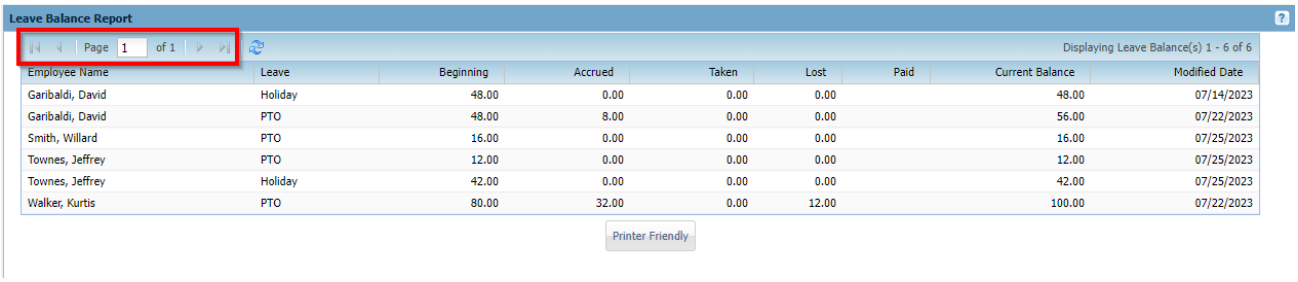



## Leave Balance Report

One way a supervisor can review the leave balances for all employees in their group is the Leave Balance Report. You can choose just one group or “View All




You can use the page navigation at the top of the screen to view additional employees.

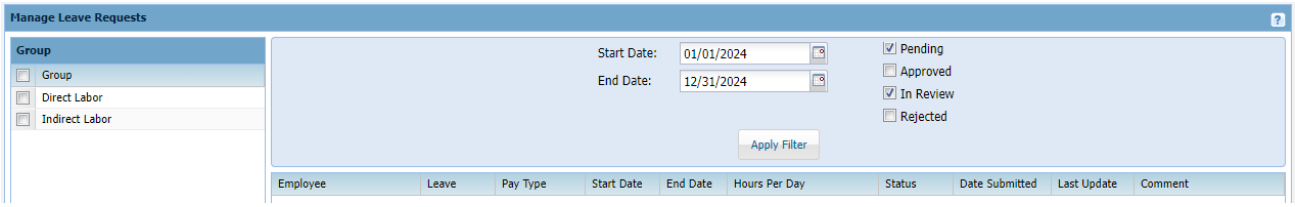



To export this report, click the “Printer Friendly” button at the bottom. The data can easily be copied into an Excel spreadsheet and sorted or edited as needed.

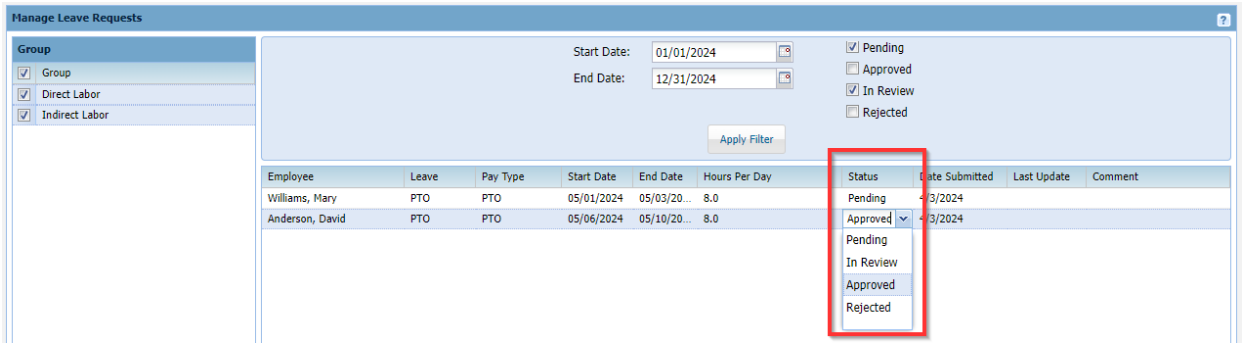
## Manage Leave Requests

An important piece of managing employees is to manage their time off. After an employee submits an electronic leave request form, the supervisor will get notified (if Administrators have turned on email notifications) that there is a pending request.

When you first select the link, you will have many filter settings including group, date range and status. For employees to appear, start by selecting at least one group. The view will default to the current year but can be changed by clicking the calendar button beside the date and changing it. You can also change the types of requests you wish to view by selecting the boxes beside the status.

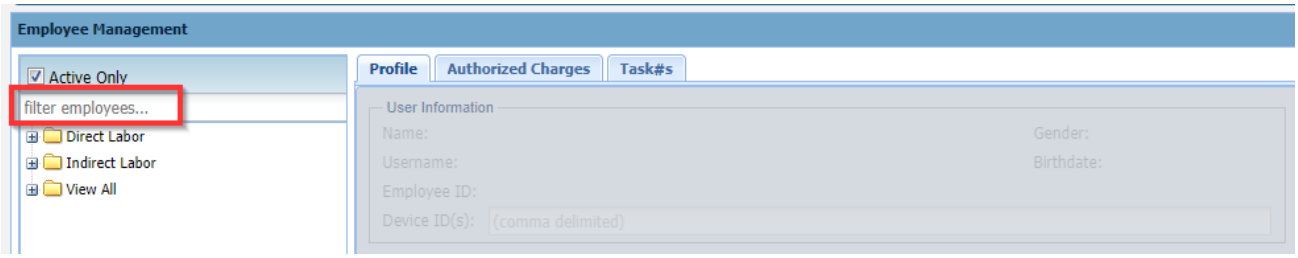


To change the status of an employee's leave request, click the status field on the row for the request. Your options are Pending, In Review, Approved and Rejected. Once the status is changed, the employee will receive an email notification (if Administrators have turned on email notifications). If you are using schedules, the employee will be able to see the leave posted on those dates and leave will appear on the schedule report as well.

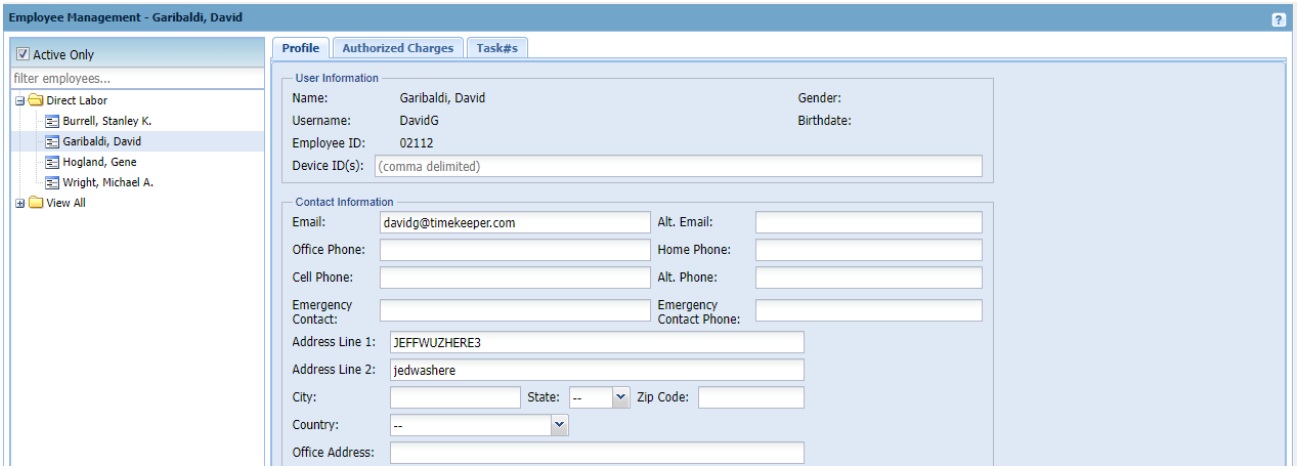



## Employee Management

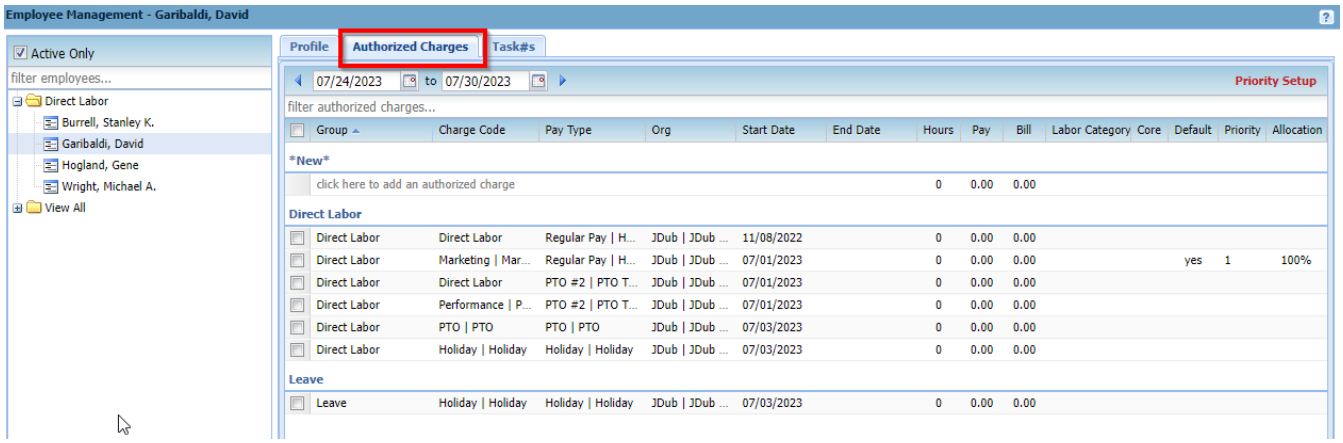
Supervisors are able to view their employee's profile as well as assigned charges and tasks from this menu item. You can use the filter box to start typing an employee name or expand the group they are in and select their name from there.



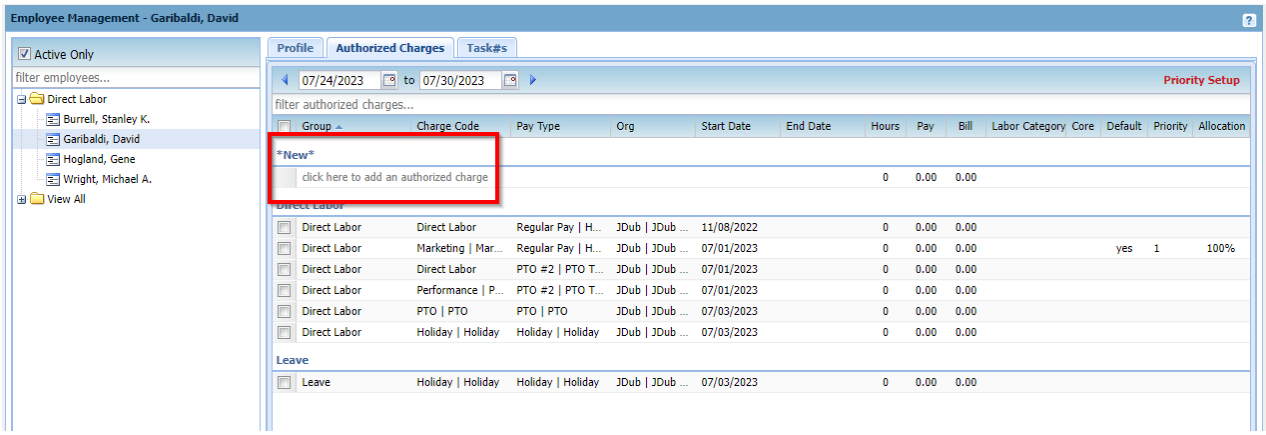

After selecting the employee's name, their profile information will appear, and you can change certain fields.



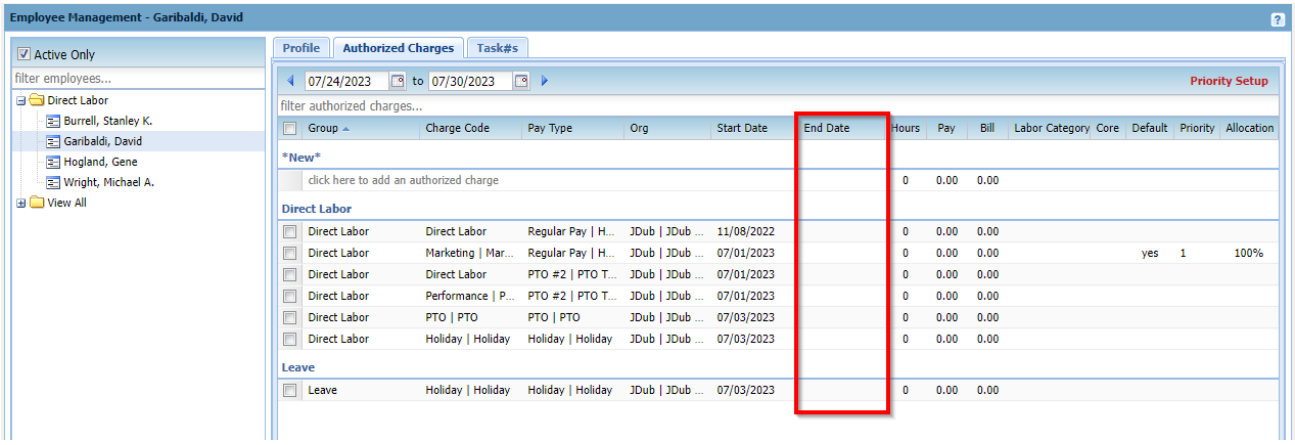

From the Authorized Charges tab, supervisors can review an employee's current job assignment as well as make any necessary changes including ending or adding new codes.



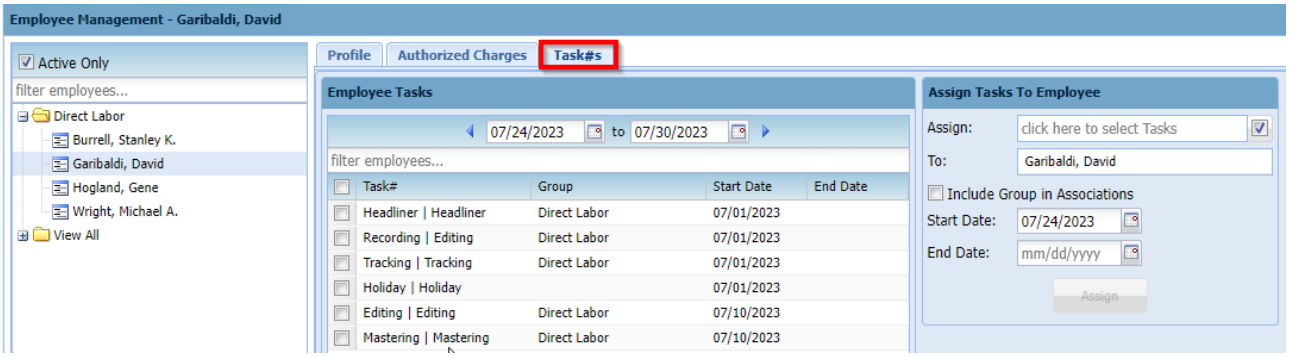

Supervisors can add a new Authorized Charge for an employee by selecting the link "click here to add an authorized charge" under "New" and above the rows of current charges.




To end an Authorized Charge, put a date in the end date column. You can delete an Authorized Charge by selecting the checkbox to the left of the row and "Delete" at the bottom. However, if a charge is used on a timesheet, you will not be able to delete an assigned code and you must add an end date.

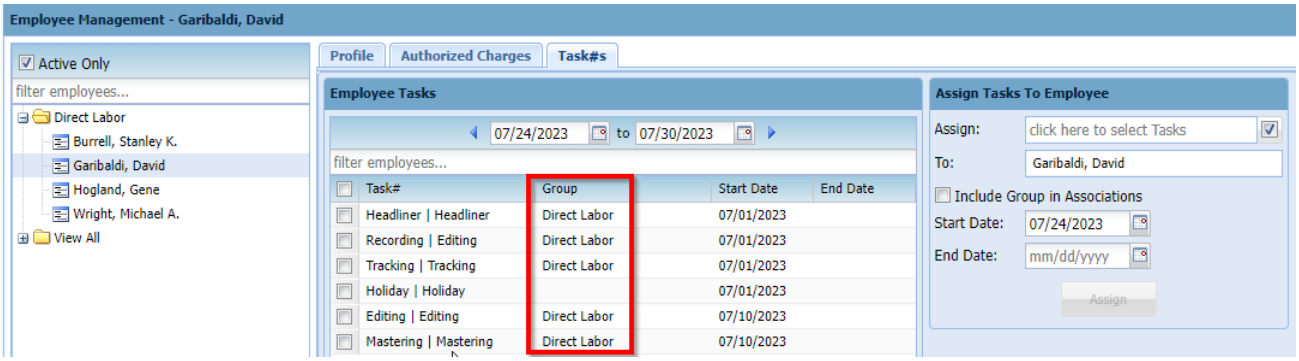



By clicking on the task tab, you can manage an employee's task assignment including assigning new and ending current associations. On the right-hand side "Assign Tasks to Employees" choose all the tasks applicable.



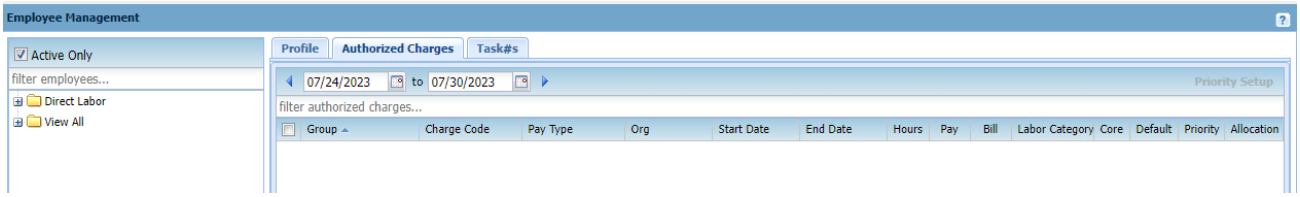
If these tasks are dependent on the group association, you must choose the employee from that group (not View All) on the left side of the page. Choose the tasks then check the box “Include Groups in Associations”. This will limit how the employee sees that task. If the employee does not need to put the task on the timesheet, enter an end date for the row. You can use the calendars above the task listing to view historical data (previously assigned and ended tasks).

For this example, the employee can choose the task Development Meeting and Junior Developer only in the DIRECT LABOR group. However, Bid & Proposal can be chosen from any group on the timesheet.

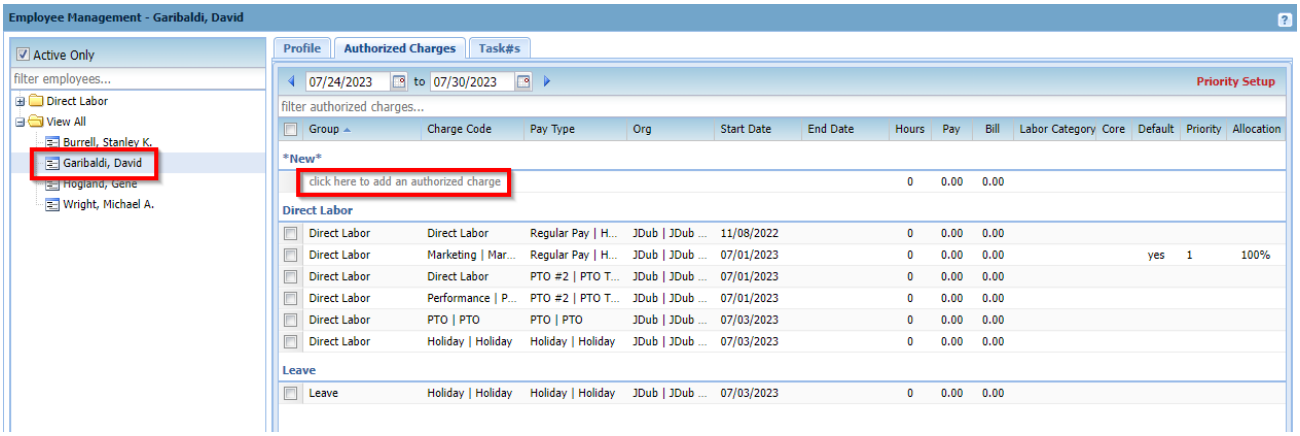



## Employee Authorized Charges

This link provides the same information as Employee Management, however, it will open directly to the Authorized Charges tab. Once an employee is selected, their information will display.




Once you select an employee, their information will be displayed.

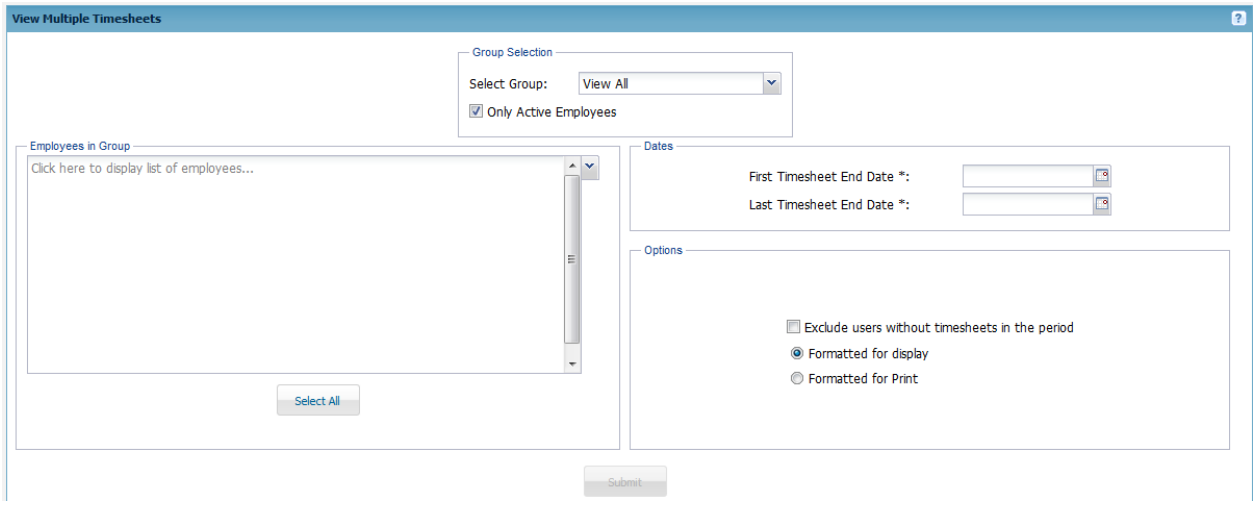



Supervisors can add a new Authorized Charge for an employee by selecting the link “click here to add an authorized charge” under “New” and above the rows of current charges. To end an Authorized Charge, put a date in the end date column. You can delete an Authorized Charge by selecting the checkbox to the left of the row and “Delete” at the bottom. However, if a charge is used on a timesheet, you will not be able to delete an assigned code and you must add an end date.

Supervisor is also able to view and edit the employee’s profile and task association just like with the Employee Management link.

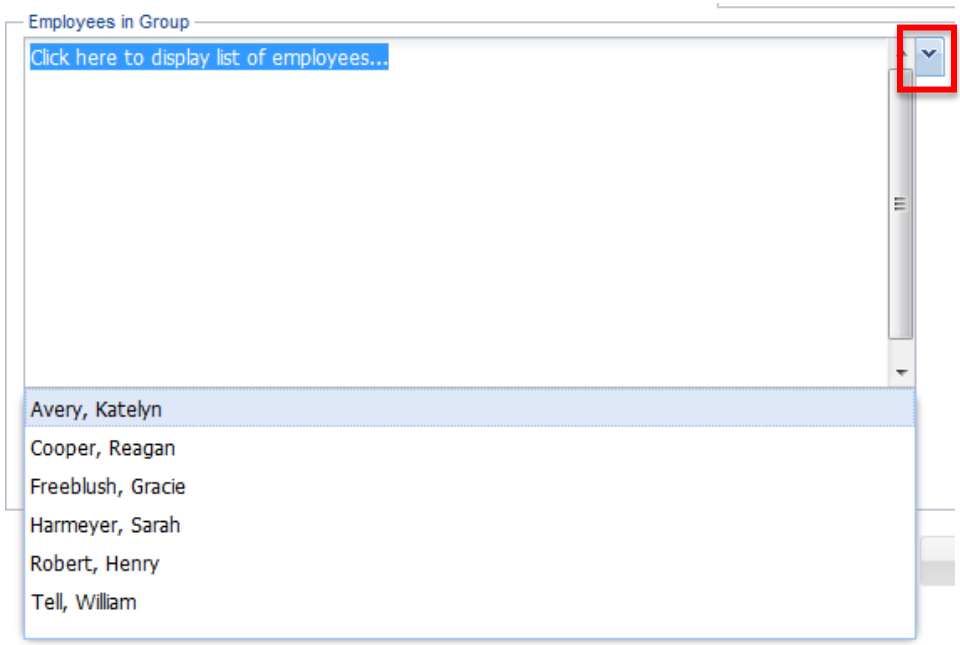
## View Multiple Timesheets

This link allows Supervisors to view or download a range of timesheets for multiple employees, multiple timesheet end dates or both. After choosing the group or “View All”, more filter options will appear.




Group Selection: Supervisor will see all groups they are assigned over and the option to View All

Employees in Group: User can choose to view all employees listed in the group or just a select few by using the selection panel on the left. The dropdown arrow will allow you to choose individuals or there is a “Select All” button at the bottom.



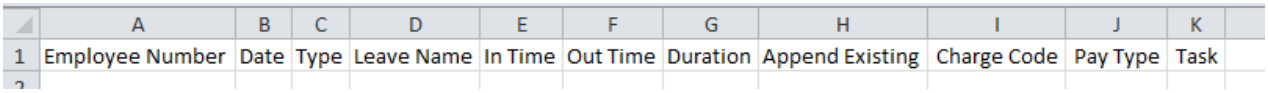

Dates: First Timesheet End Date can be the same as Last Timesheet End Date or if you need a range, it can be different. They must be Timesheet End Dates or no data will display.

Options: How you would like the file to be formatted and whether or not to include employees that do not have a timesheet.

## Import Employee Schedules

Supervisors have the ability to import employee schedules; however, they must also have the Scheduler role to be able to manage an individual day or run reports associated with schedules. Employees will be able to view schedules from Employee > My Schedule.

The import file must be saved as .CSV before importing. Headers must include:



| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Employee Number | Date | Type | Leave Name | In Time | Out Time | Duration | Append Existing | Charge Code | Pay Type | Task |

Employee Number
Date
Type
Leave Name
In Time
Out Time
Duration
Append Existing
Charge Code
Pay Type
Task

## Notes for the Schedule Import

What are the definitions of the .csv template headers?

emp_number = employee number
date = date [MUST be in m/d/yyyy format]
type = In/Out or Leave
leave name = can be left blank if using in/outs
in_time = MUST be in 8:00a or 5:00p format or it will fail (military time and AM or PM will fail)
out_time = same as above
duration = left blank if in/outs, fill in for leave
append_existing = do you want it to overwrite what is already on the schedule? must answer y or n

Is the format based on a seven-day week?

The format is one date at a time, doesn't matter the timesheet period or length. Each row on the import is for one day, one employee.

How many pay periods can we upload at a time?

You can do a few months at a time however if you are doing a bunch of employees I would limit it to about a month at a time. If the schedule will not change (employee always works 8a-5p) then you can import one pay period, go to Schedule Management and "Set as Default". Make sure that days employee does not work (like Saturday and Sunday) are not

populated. If they are and the schedule is copied or set as default, those days off will still be included.

Will employees be able to see more than one pay period when planning leave time?

The employee is able to see future schedules one period at a time. They go to Employee > My Schedule and can use the arrows to move between timesheet periods.

Will the schedule update with leave request approvals?

Leave will be posted on the schedule after it's approved even if the employee already has hours on their schedule. However, if you run an import, put Yes for append_existing it will overwrite what is there for that day.

Is there a "public" type schedule calendar that all can see?

There is a schedule report schedule administrators can run. Scheduling > Schedule Report. If needed, it can be saved to PDF and uploaded under Blank Forms.

Can these schedules be updated line by line or will the entire schedule have to be uploaded when shifts or schedules change?

You can rerun an import, just mark append_existing to y and it will overwrite. Or you can go to Schedule Management and change employee schedule from there.

Do I upload each employee individually or can I create one spreadsheet for all employees?

Either way works fine. I just tested the one employee but all imports work with multiple ones.

Example for In/Out Import

emp_number = employee number
date = date [MUST be in m/d/yyyy format]
type = In/Out
leave name = blank
in_time = MUST be in 8:00a or 5:00p format or it will fail (military time and AM or PM will fail)
out_time = same as above
duration = blank
append_existing = do you want it to overwrite what is already on the schedule? must answer y or n

| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Employee Number | Date | Type | Leave Name | In Time | Out Time | Duration | Append Existing | Charge Code | Pay Type | Task |
| 2 | 1001 | 6/5/2018 | In/Out | | 8:00a | 5:00p | | y | | | |

Example for Leave Import

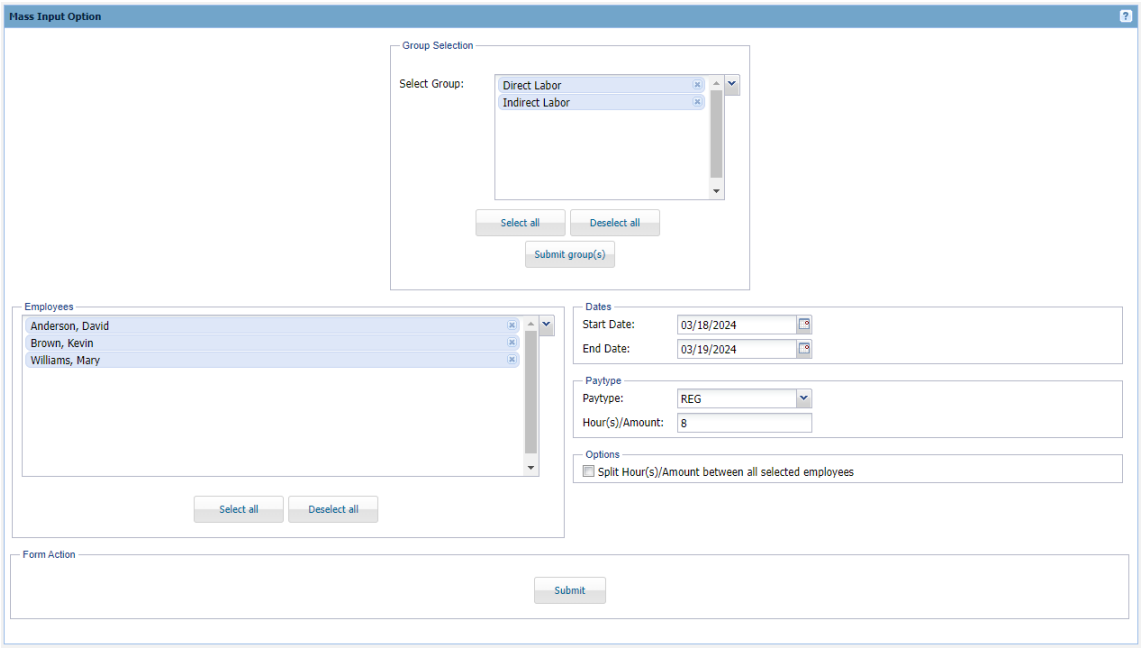
emp_number = employee number

date = date [MUST be in m/d/yyyy format]
type = Leave
leave name = leave name
in_time = blank
out_time = blank
duration = total hours of leave for that day
append_existing = do you want it to overwrite what is already on the schedule? must answer y or n

| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Employee Number | Date | Type | Leave Name | In Time | Out Time | Duration | Append Existing | Charge Code | Pay Type | Task |
| 2 | 1001 | 6/6/2018 | Leave | Vacation | | | 8 | y | | | |
| 3 | | | | | | | | | | | |

## Mass Timesheet Update

Similar to Mass In/Out update, this page will allow you to edit multiple timesheets at one time. Instead of adding In/Out times, this will add total hours to certain employees' days. After choosing the group or "View All", more filter options will appear.




Group Selection: Supervisor will see all groups they are assigned over and the option to View All

Employees: User can choose to view all employees listed in the group or just a select few by using the selection panel on the left. The dropdown arrow will allow you to choose individuals or there is a "Select All" and "Deselect All" button at the bottom.

Dates: Choose the date the entry needs to appear. If it is just one day, the start date and end date will be the same.

Pay Type: The dropdown box allows the Supervisor to choose from a list of all active Pay Types. Enter the total hours to be assigned to each timesheet or the total hours the selected employees will split.

Options: If multiple employees are chosen, user has the option to split the total hours in the above field with them.

Note: Employee timesheet cannot be submitted or approved. If the employee is selected, you will get an error message when you click “Submit”.