Approval Hub (HR & Ops Suite)

Timesheet End-User & Configuration Guide

Version 2.0.3

1. Introduction to Approval Hub (HR & Ops Suite)..... 4
1.1. The Timesheet Module..... 4
2. End-User Guide: Step-by-Step..... 5
2.1. Dashboard Overview..... 5
2.1.1. Metric Widgets (At-a-Glance)..... 5
2.1.2. Request Management..... 5
2.1.3. Sidebar Features..... 6
2.2. Managing Timesheets..... 6
2.2.1. Interface Overview & Navigation..... 6
2.2.2. Tracking Time (Logging Entries)..... 7
2.2.3. Editing & Management..... 7
2.2.2 Submitting Timesheets..... 8
General Information..... 8
Timesheet Details..... 8
Request Details & Submission..... 9
2.3. Request Center (My Submissions)..... 9
2.3.1. Dashboard Summary..... 9
2.3.2. Managing and Filtering Requests..... 10
2.3.3. Request List View..... 10
2.4. My Reports..... 11
2.4.1. Timesheet Reports..... 11
2.5. My Projects (For the Project Manager)..... 12
2.5.1. All Projects..... 12
2.5.2. Project Details..... 13
3. Configurations..... 14
3.1. Timesheet Form Configurations..... 14
3.1.1 General Settings..... 14
3.1.2 Features..... 14
3.1.3 Limits..... 15
3.1.4 Submission Access..... 15
3.2. Customers (Customer Management)..... 15
3.2.1. Overview and Navigation..... 16
3.2.2. Managing Customer Records..... 16
3.2.3. Data Columns..... 16
3.3. Projects..... 16
3.3.1. Project Settings..... 17
3.3.2. Category Tasks..... 19

3.3.3. Project Members.....20
4. Additional Resources.....20

1. Introduction to Approval Hub (HR & Ops Suite)

The Approval Hub (HR & Ops Suite) is a comprehensive enterprise platform engineered to centralize and automate critical HR and operational workflows. By unifying disparate business processes into a single, intuitive interface, the Approval Hub ensures data consistency, improves compliance, and significantly accelerates approval turnaround times across the organization.

1.1. The Timesheet Module

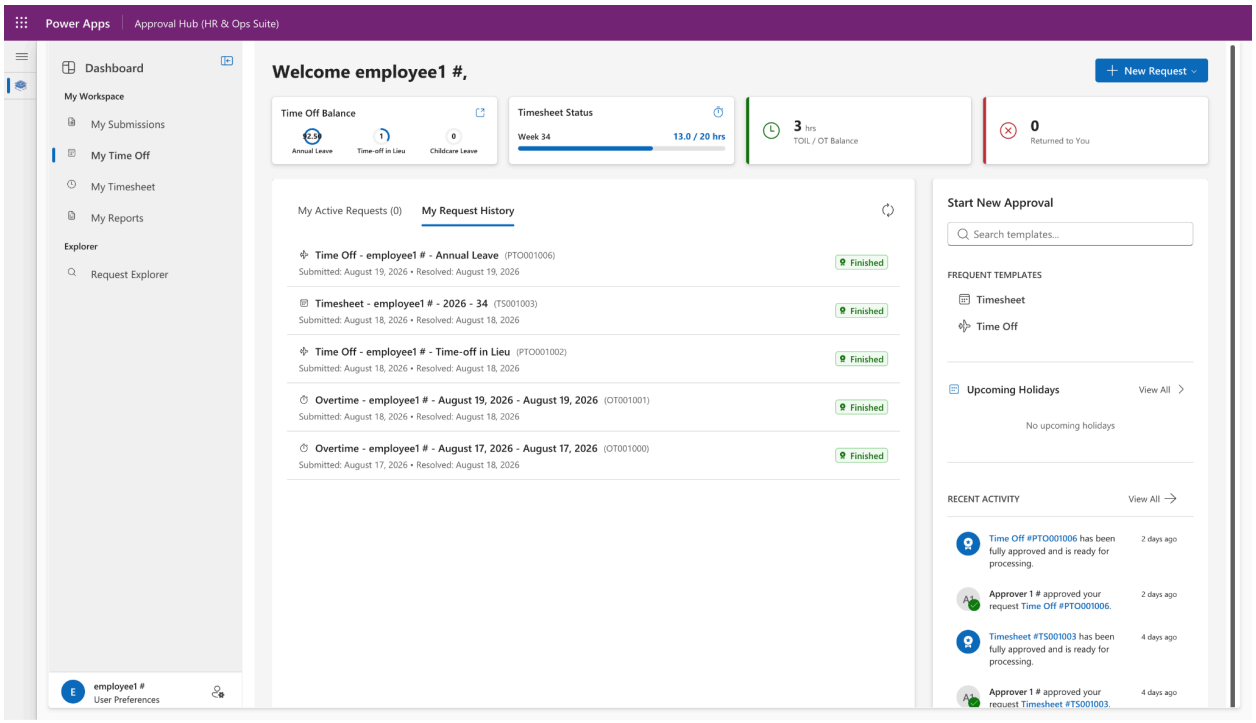
As a core component of the Approval Hub ecosystem, the Timesheet module is a specialized application designed to streamline labor management and productivity tracking. It provides a robust, end-to-end solution for logging work hours, associating time with specific projects, and managing complex approval hierarchies.

Key features of the Timesheet application include:

- **Unified Time Tracking:** A streamlined interface for employees to log project-specific hours, billable time, and overtime, ensuring accurate reporting.
- **Managerial Insights:** Real-time dashboards that allow project managers to oversee team contributions, monitor budget burn rates, and analyze resource allocation.
- **Configurable Workflows:** Built-in automation that routes timesheet submissions through predefined approval chains (e.g., Project Manager to Finance Manager), reducing administrative overhead.
- **System-Wide Integration:** Seamless interaction with other Hub modules to ensure leave records, project codes, and fiscal data are synchronized across the organization.

2. End-User Guide: Step-by-Step

2.1. Dashboard Overview



The Dashboard is your personalized command center, designed to provide real-time visibility into your requests, balances, and workload status. Upon logging in, you can manage your HR tasks and view recent activity at a glance.

2.1.1. Metric Widgets (At-a-Glance)

The top row of the dashboard displays key metrics regarding your time and leave:

- **Time Off Balance:** Displays a breakdown of your current leave quotas, including 'Annual Leave', 'Time-off in Lieu', and 'Childcare Leave'. You can click the external link icon to navigate to your detailed leave balance view.
- **Timesheet Status:** Provides a visual progress bar indicating your hours logged versus your target hours for the current fiscal week.
- **TOIL / OT Balance:** Shows your accumulated 'Time Off in Lieu' or 'Overtime' hours.
- **Returned to You:** Highlights any requests that have been rejected or sent back for correction, requiring your immediate attention.

2.1.2. Request Management

The central area allows you to track the lifecycle of your submissions:

- **Tabs:** Toggle between **My Active Requests** (items currently in progress) and **My Request History** (a log of resolved or completed submissions).
- **Request List:** Each entry displays the request type, unique ID (e.g., PTO001006), and the submission/resolution dates. A status indicator (e.g., 'Finished') confirms the current state of the workflow.

2.1.3. Sidebar Features

The right-hand panel provides tools to accelerate your workflow:

- **New Request:** Click the blue button at the top right to initiate a new approval request globally.
- **Start New Approval:** Use the search bar to find specific request templates, or select from **Frequent Templates** like 'Timesheet' or 'Time Off' for one-click access.
- **Upcoming Holidays:** Keep track of company holidays to assist with your planning.
- **Recent Activity:** Stay informed with a chronological feed of updates, such as approvals or status changes, related to your submitted requests.

2.2. Managing Timesheets

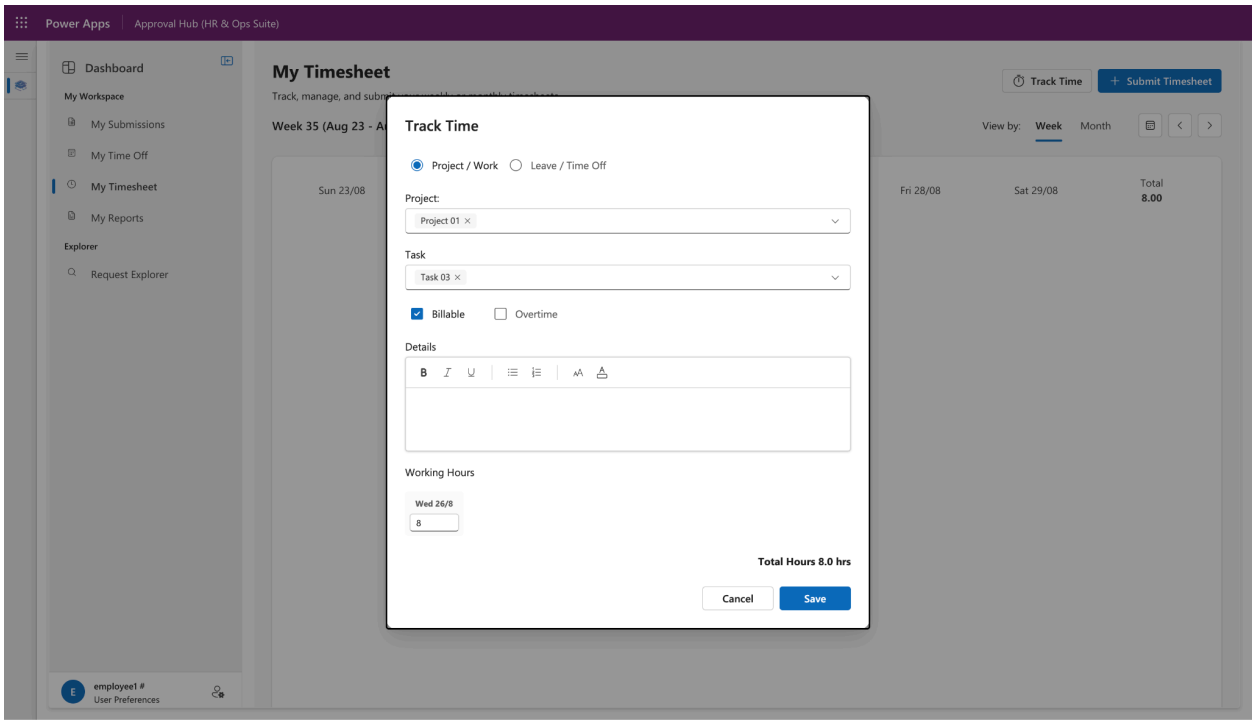
The 'My Timesheet' module is your centralized interface for recording, organizing, and submitting your work hours. Whether you are tracking daily tasks or managing your monthly schedule, this section provides the tools needed to keep your timesheets accurate and up-to-date.

2.2.1. Interface Overview & Navigation

To access your timesheet, select 'My Timesheet' from the left-hand navigation menu.

- **View Options:** Switch between 'Week' and 'Month' views using the toggle buttons at the top right to adjust your dashboard layout according to your reporting preference.
- **Date Navigation:** Use the date picker icon or the arrow keys ('<' and '>') to navigate through different fiscal weeks or months.
- **Quick Actions:**
    - **Track Time:** Opens the 'Track Time' modal to add new entries.
    - **Submit Timesheet:** Initiates the final submission process for the currently selected period.

2.2.2. Tracking Time (Logging Entries)



Follow these steps to log your daily activities:

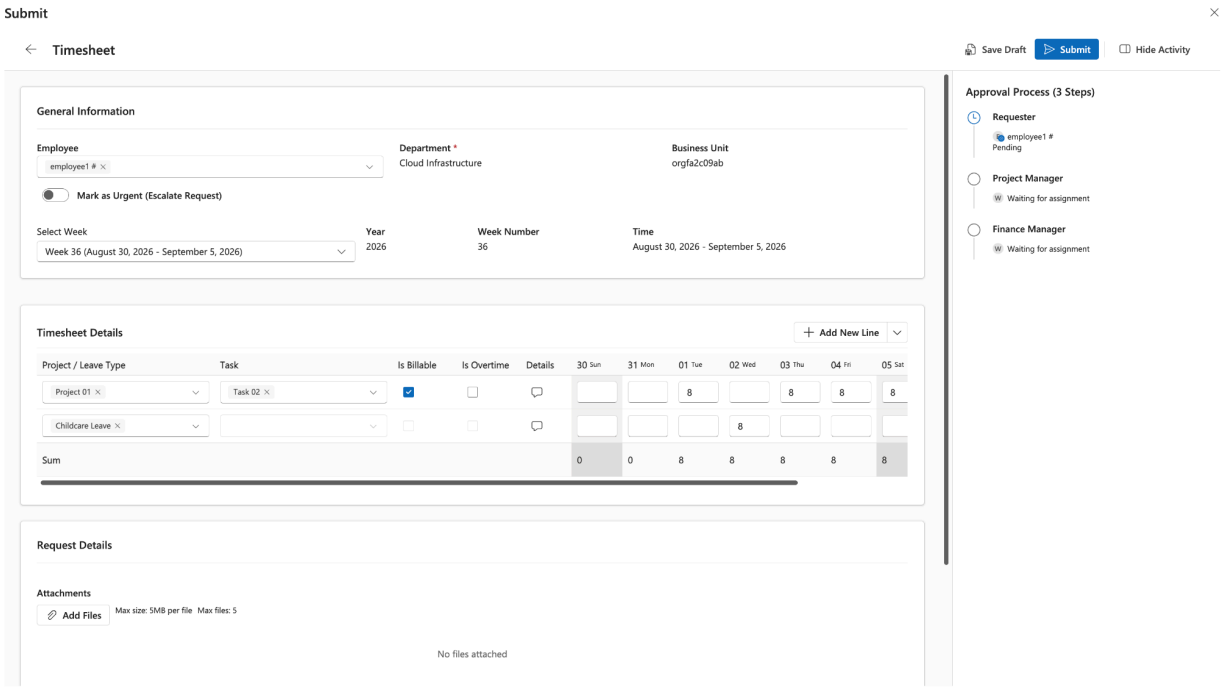
1. 1. Click the **'Track Time'** button to open the input dialog.
2. 2. **Select Activity Type:** Choose between **'Project / Work'** or **'Leave / Time Off'** to categorize your entry.
3. 3. **Define Project & Task:** Select the relevant **'Project'** and **'Task'** from the provided dropdown menus.
4. 4. **Set Attributes:** Toggle **'Billable'** or **'Overtime'** status if applicable to the work performed.
5. 5. **Add Details:** Utilize the rich text editor to provide context, descriptions, or project notes.
6. 6. **Enter Hours:** Input the number of hours worked for the specific date in the 'Working Hours' field.
7. 7. **Finalize:** Click **'Save'** to record your entry to the grid.

2.2.3. Editing & Management

- **Reviewing Entries:** Once saved, entries appear in the main grid, allowing you to see your distribution of hours across projects and days.
- **Total Hours:** The system automatically calculates the 'Total' column, providing an immediate snapshot of your daily or weekly labor distribution.

- **Updates:** If you need to correct an entry, click on the existing record in the grid to reopen the 'Track Time' modal, modify your details, and save the changes.

2.2.2 Submitting Timesheets



The 'Submit' interface is where you finalize your timesheet for review and approval. Once your hours are logged, follow these steps to submit your record.

General Information

1. **Employee Details:** Verify that the 'Employee', 'Department', and 'Business Unit' fields are auto-populated correctly based on your profile.
2. **Priority Toggle:** Use the 'Mark as Urgent (Escalate Request)' switch if your submission requires expedited approval.
3. **Submission Period:** Use the 'Select Week' dropdown to choose the specific fiscal week for which you are submitting your timesheet. The 'Year', 'Week Number', and date range will update automatically to reflect your selection.

Timesheet Details

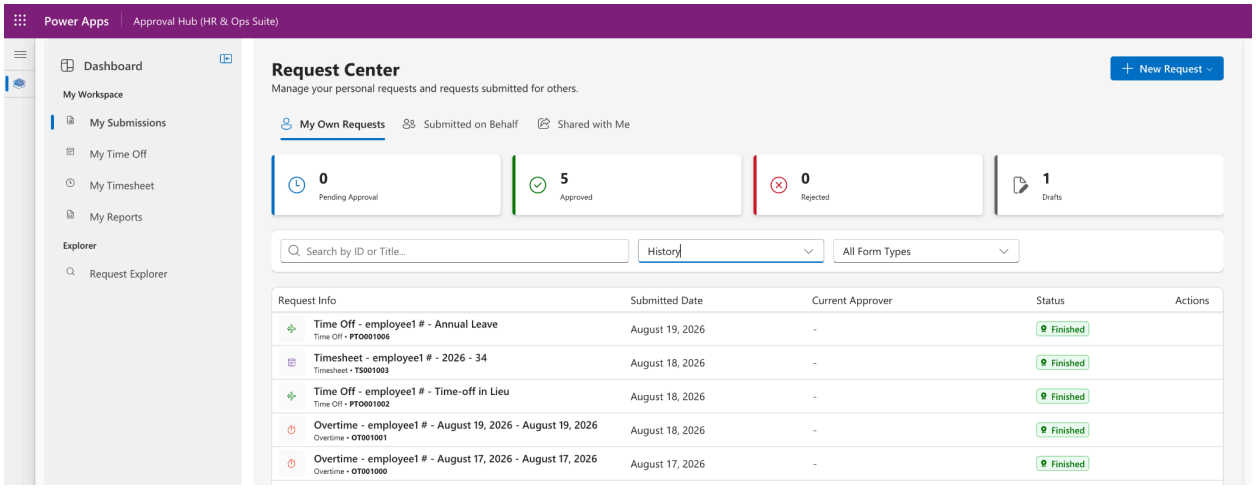
4. **Grid Review:** Inspect the table of logged entries. Each row displays the 'Project / Leave Type', 'Task', 'Is Billable'/'Is Overtime' status, and individual daily hours.
5. **Adding Entries:** Click 'Add New Line' to insert additional project or leave entries if not already populated.

6. **Notes:** Click the speech bubble icon in the 'Details' column to view or add notes for specific entries.
7. **Summation:** The bottom row automatically calculates the total hours logged for each day and in aggregate.

Request Details & Submission

8. **Attachments:** Click 'Add Files' to upload supporting documentation. You can upload a maximum of 5 files, with each file limited to 5MB.
9. **Drafts:** Click 'Save Draft' at the top right to save your progress without submitting, allowing you to return and complete it later.
10. **Final Submission:** Once you are ready, click the 'Submit' button.
11. **Approval Workflow:** Once submitted, the 'Approval Process' panel on the right will activate, showing the status of each step (Requester, Project Manager, Finance Manager). You can toggle 'Hide Activity' to minimize this panel if desired.

2.3. Request Center (My Submissions)



The Request Center serves as your primary hub for overseeing, tracking, and managing all of your submission activities. Whether you are monitoring the status of your own requests, reviewing items submitted on behalf of others, or accessing requests shared with you, this interface provides complete visibility into your request lifecycle.

2.3.1. Dashboard Summary

At the top of the Request Center, four status cards provide an immediate snapshot of your current submission pipeline:

- **Pending Approval:** Shows the number of requests currently awaiting action.

- **Approved:** Displays the total count of successfully approved requests.
- **Rejected:** Indicates the number of requests that were denied or returned for revision.
- **Drafts:** Represents the number of saved, in-progress submissions that have not yet been formally submitted.

2.3.2. Managing and Filtering Requests

You can utilize several tools to organize and refine your request view:

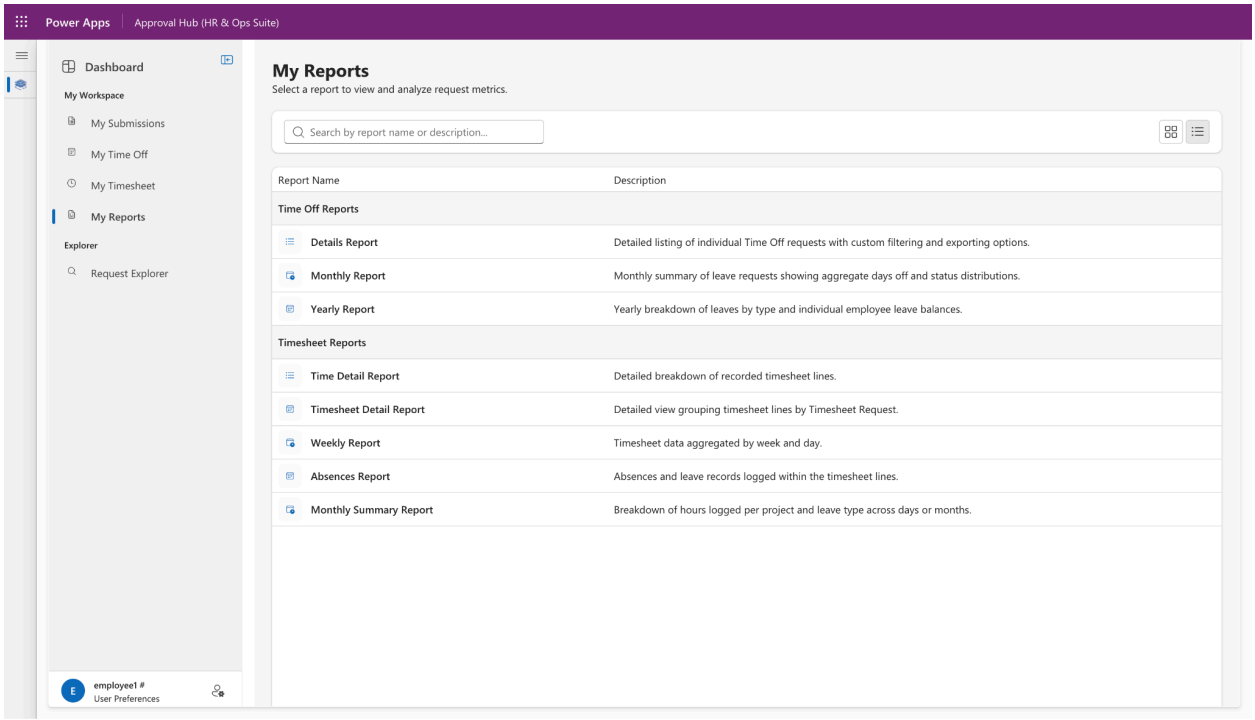
- **Request Tabs:** Click the "My Own Requests," "Submitted on Behalf," or "Shared with Me" tabs to switch between different categories of submissions.
- **Global Search:** Enter keywords, request IDs, or titles into the search bar to quickly locate specific records.
- **Dynamic Filters:**
    - **Status Toggle:** Use the dropdown filter (labeled "History" or "Active") to switch your view between active workflows and completed historical records.
    - **Form Type Filter:** Narrow your results by selecting specific categories (e.g., Time Off, Timesheet, Overtime) from the "All Form Types" dropdown.

2.3.3. Request List View

The central data grid provides a detailed breakdown for each request, featuring the following columns:

- **Request Info:** Identifies the request type and provides the unique ID number.
- **Submitted Date:** Displays the exact date the request was initiated.
- **Current Approver:** Shows the name or role of the individual currently responsible for the next action in the workflow.
- **Status:** Displays the current stage of the request (e.g., Finished, Pending, In Progress).
- **Actions:** Provides access to contextual buttons or links to perform specific operations on the request.

2.4. My Reports



The 'My Reports' section provides advanced analytical tools for monitoring and evaluating your time management and project activities. You can search for specific reports by name using the search bar at the top of the interface.

2.4.1. Timesheet Reports

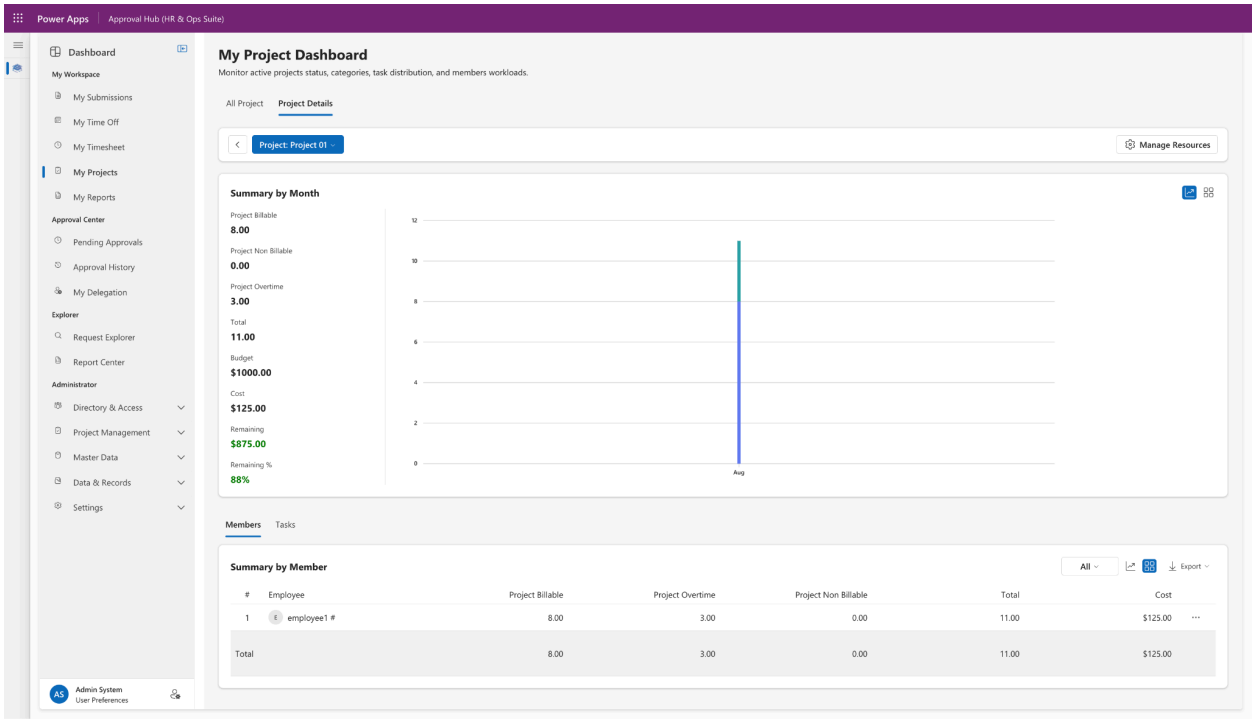
This section provides granular data analysis for your timesheet submissions:

- **Time Detail Report:** Provides a comprehensive, itemized breakdown of all individual timesheet lines recorded.
- **Timesheet Detail Report:** Offers a structured view that groups timesheet lines by their parent Timesheet Request, allowing you to review submissions as a whole.
- **Weekly Report:** Aggregates your timesheet data by week and specific day, ideal for weekly productivity reviews.
- **Absences Report:** Tracks all absences and leave records that have been captured within your timesheet entries.
- **Monthly Summary Report:** Delivers a high-level breakdown of total hours logged, categorized by project and leave type, analyzed across daily or monthly intervals.

2.5. My Projects (For the Project Manager)

The 'My Projects' module provides Project Managers with a centralized dashboard to oversee project health, budgets, and resource allocation.

2.5.1. All Projects



This view offers a high-level summary of your active projects.

- **Search:** Use the search bar to locate specific projects by name or code.
- **Export:** Click the 'Export' button to download your project portfolio report for external analysis.
- **Project Table:**
    - **Project Code & Name:** Identifies the project uniquely.
    - **Customer:** Displays the associated client.
    - **Budget:** Shows the total allocated budget for the project.
    - **Spent %:** Visual indicator of current spending progress relative to the total budget.
    - **Remaining:** Displays the current balance of the project budget.
    - **Actions:** Use the action icon to navigate to the detailed view of a specific project.

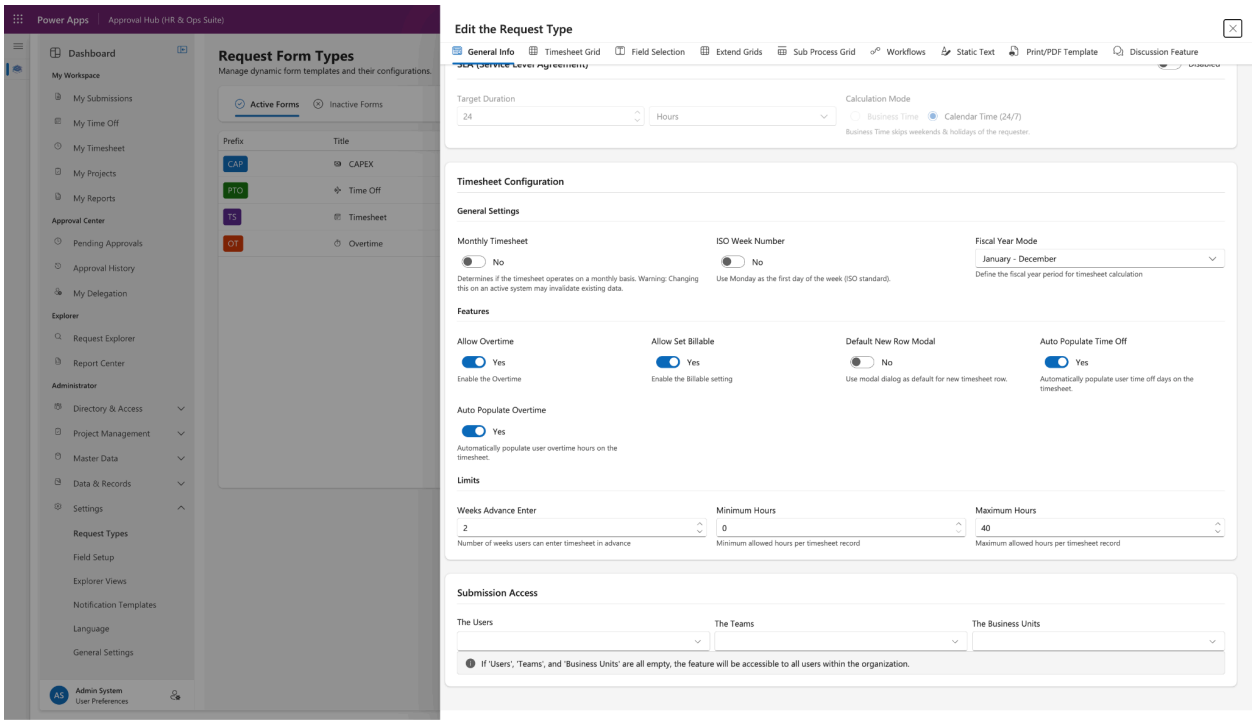
2.5.2. Project Details

This view provides a deep-dive analysis of a selected project.

- **Project Selector:** Use the dropdown menu at the top to toggle between different active projects.
- **Manage Resources:** Click the 'Manage Resources' button to directly access team allocation and configuration settings.
- **Financial Summary:**
    - Provides a breakdown of hours logged: Project Billable, Project Non-Billable, Project Overtime, and Total hours.
    - Tracks project health through financial metrics: Total Budget, Actual Cost, Remaining Balance, and Remaining Percentage.
- **Activity Visualization:** Review the chart showing monthly performance trends.
- **Data Tabs:**
    - **Members Tab:** View individual team member contributions, including a breakdown of their hours (Billable, Overtime, Non-Billable) and individual project costs.
    - **Tasks Tab:** Provides insights into task-level distribution and progress.
- **Export:** Click the export icon to extract the project's detailed metrics.

3. Configurations

3.1. Timesheet Form Configurations



The Timesheet Form Configurations allow administrators to customize the timesheet interface, data validation logic, and access permissions.

3.1.1 General Settings

- **Monthly Timesheet:** Toggles the timesheet frequency between daily/weekly and monthly modes. Warning: Altering this setting on an active system may invalidate existing data.
- **ISO Week Number:** Enable this to enforce ISO standards, setting Monday as the start of the work week.
- **Fiscal Year Mode:** Define the fiscal year cycle (e.g., January–December) to align system reporting with your organization's financial calendar.

3.1.2 Features

- **Allow Overtime:** Enable or disable the ability for users to log overtime hours.
- **Allow Set Billable:** Grants users the option to mark specific line items as "Billable" for client project accounting.
- **Default New Row Modal:** When enabled, the system defaults to opening a modal dialog window for inputting new timesheet entries.

- **Auto Populate Time Off:** Automatically inserts approved time-off or leave records directly into the user's timesheet.
- **Auto Populate Overtime:** Automatically calculates and inserts overtime hours into the timesheet for the user.

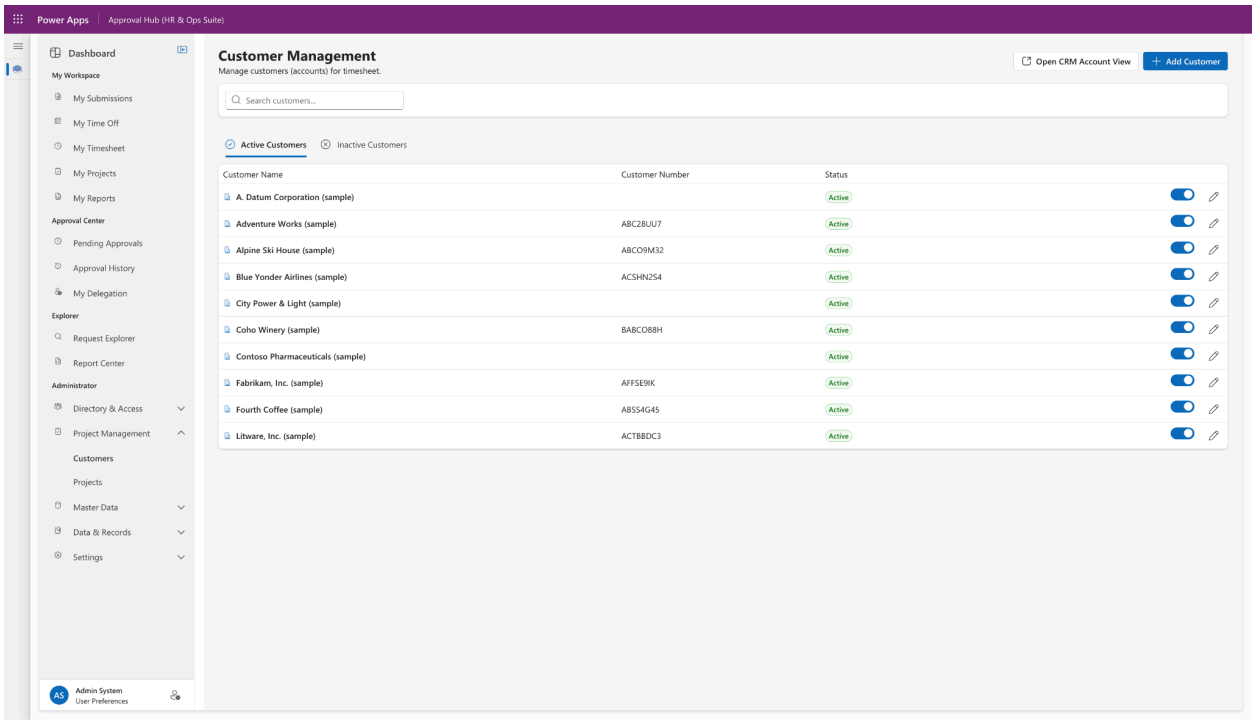
3.1.3 Limits

- **Weeks Advance Enter:** Sets the maximum number of weeks into the future that users are allowed to log hours.
- **Minimum/Maximum Hours:** Establishes the permissible range of hours that can be logged per timesheet record to ensure data integrity and prevent input errors.

3.1.4 Submission Access

- **Targeting:** Use the 'Users', 'Teams', and 'Business Units' fields to restrict timesheet submission access. If all these fields are left empty, the timesheet feature remains accessible to all users within the organization by default.

3.2. Customers (Customer Management)



The Customer Management interface allows administrators to maintain the master list of client accounts, which serve as the foundation for project association and timesheet tracking within the system.

3.2.1. Overview and Navigation

- **Access:** Navigate to **Administrator > Project Management > Customers** to view the customer dashboard.
- **Search:** Use the top search bar to quickly locate customers by name or other identifiers.
- **CRM Integration:** Click **Open CRM Account View** to synchronize or view account details directly from your integrated CRM system.

3.2.2. Managing Customer Records

- **Add Customer:** Use the **Add Customer** button to create a new client account entry in the system.
- **Edit Details:** Locate the customer in the list and click the **pencil icon** to modify customer information, such as the Customer Name or Customer Number.
- **Status Management:**
    - Use the **toggle switch** in the 'Status' column to instantly set a customer as 'Active' or 'Inactive'.
    - Inactive customers can be viewed by clicking the **Inactive Customers** tab, while current clients remain visible under the **Active Customers** tab.

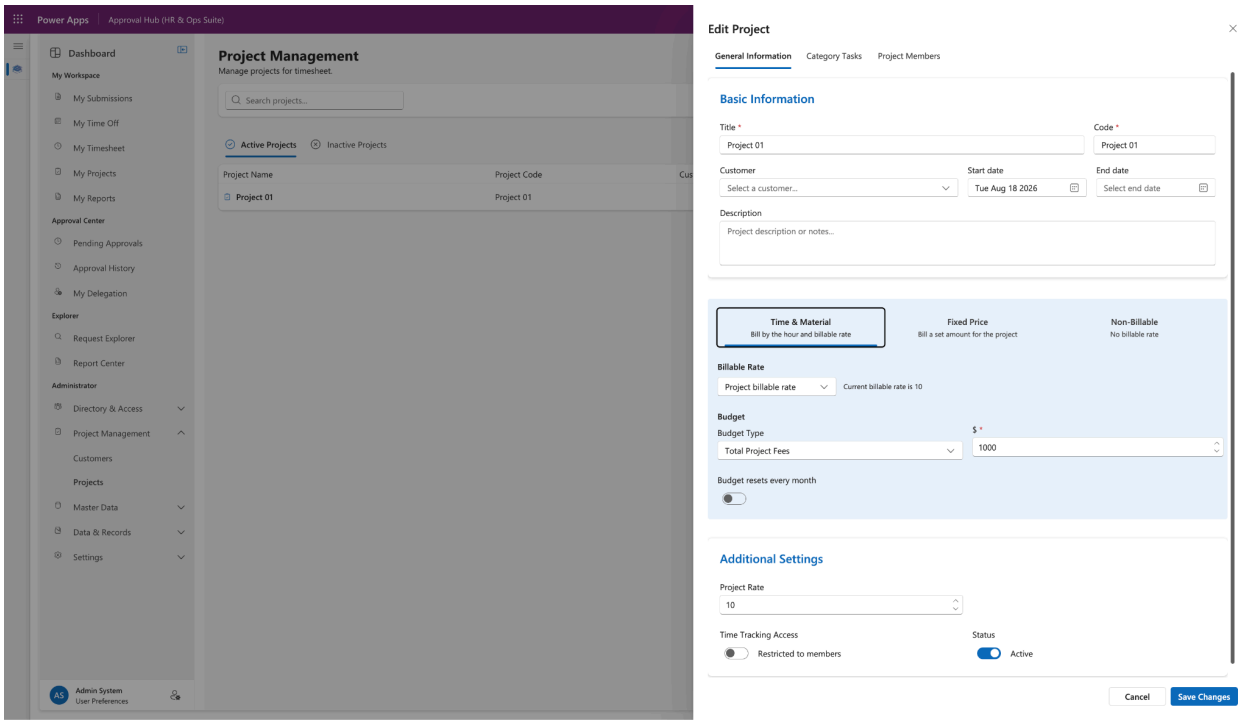
3.2.3. Data Columns

- **Customer Name:** Displays the official name of the account.
- **Customer Number:** Shows the unique identification code assigned to the customer for accounting and tracking purposes.
- **Status:** Indicates whether the customer record is currently active for project assignment.

3.3. Projects

The Projects section allows administrators to define and manage project parameters, assign team members, and configure billing and task tracking.

3.3.1. Project Settings

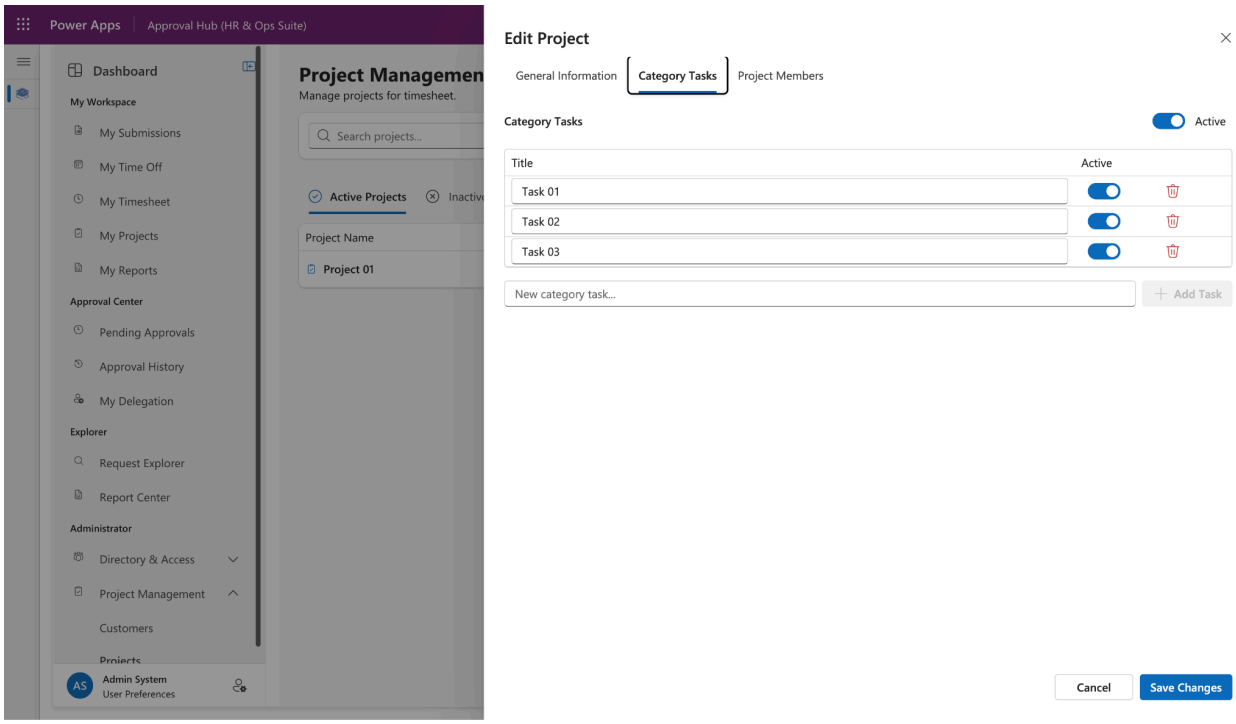


Navigate to **Administrator > Project Management > Projects** to view the project list. Select an existing project or click "Add Project" to open the configuration panel.

- **Basic Information:**
    - **Title & Code:** Define the project name and unique identifier code.
    - **Customer:** Associate the project with a specific customer from the dropdown menu.
    - **Dates:** Set the project's start and end dates.
    - **Description:** Add relevant notes or project summaries.
- **Billing & Budget:**
    - **Billing Model:** Select the foundational billing method:
        - **Time & Material:** Bills clients based on hours worked multiplied by the billable rate.
        - **Fixed Price:** Assigns a flat, predetermined amount for the entire project.
        - **Non-Billable:** Tracks internal project work with no billable financial implications.
    - **Billable Rate:** When using "Time & Material," select how the rate is calculated:

        - **Project billable rate:** Applies a single rate across the entire project.
        - **Person billable rate:** Applies different rates depending on the specific team member.
        - **Task billable rate:** Applies rates specific to the task being performed.
        - **No bill:** Disables billing for this project.
    - **Budget:** Define how project constraints are monitored:
        - **Budget Type:** Choose the metric for budget tracking:
            - *Hours-based:* Total Project Hours, Hours Per Task, or Hours Per Person.
            - *Fees-based:* Total Project Fees, Fees Per Task, or Fees Per Person.
            - *No budget:* Disables budget tracking.
        - **Amount:** Enter the numerical limit for your chosen budget type.
        - **Budget resets every month:** Enable this toggle if the budget allowance refreshes at the start of each month.
- **Additional Settings:**
    - **Project Rate:** Set the default base rate for the project.
    - **Time Tracking Access:** Enable "Restricted to members" to limit time-logging access strictly to assigned project members.
    - **Status:** Toggle the switch to set the project as **Active** or **Inactive**.

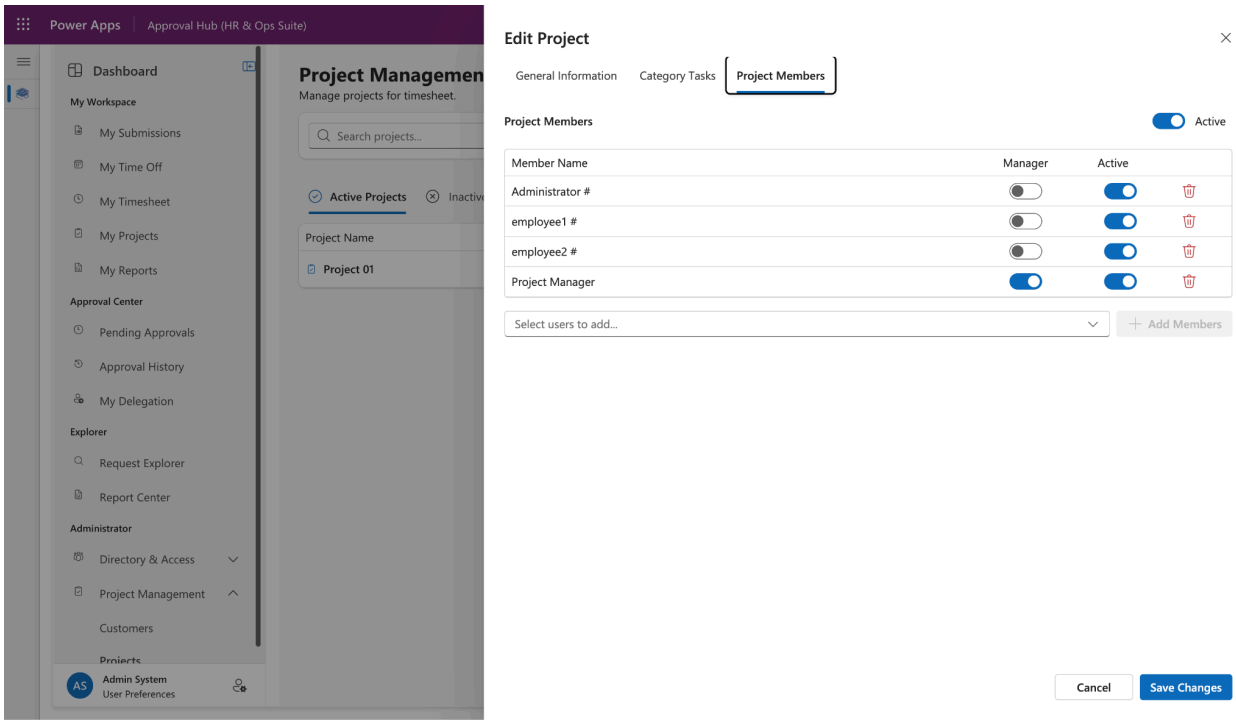
3.3.2. Category Tasks



This tab defines the specific tasks available for users to select when logging time against this project.

- **Define Tasks:** Add task names (e.g., "Development," "Testing") in the task entry field and click "Add Task."
- **Task Control:**
    - **Active Toggle:** Use the toggle next to each task to enable or disable it for selection in the timesheet.
    - **Deletion:** Click the trash icon to remove a task from the project.

3.3.3. Project Members



Manage user access and roles for the project.

- **Add Members:** Select users from the dropdown menu to add them to the project team.
- **Manage Roles:**
    - **Manager Toggle:** Enable the "Manager" toggle to grant a user project management permissions (e.g., viewing dashboards or approving requests).
    - **Active Toggle:** Use the toggle to temporarily deactivate a member's access to the project without removing them from the list.
- **Deletion:** Click the trash icon to remove a member permanently from the project team.

Click **Save Changes** to apply all updates to the project configuration.

4. Additional Resources

For advanced administrative configurations not covered in this guide—such as setting up global delegations, configuring notification templates, managing system languages, or customizing request explorer views—please consult the comprehensive system documentation provided below:

- Administrator Guide
- End-User & Approver Manual