TIMES SOFTWARE

TIMES PRO Claim

User Guide for Administrators

Document Version: 1.0

Released Date: 1 January 2023

TABLE OF CONTENTS

RELATED GUIDES

Before proceeding this user guide, please read the following guides first.

TIMES PRO Introductory Guide.

DISCLAIMER

THE SPECIFICATIONS AND INFORMATION REGARDING THE PRODUCTS IN THIS USER GUIDE ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL STATEMENTS, INFORMATION, AND RECOMMENDATIONS IN THIS USER GUIDE ARE BELIEVED TO BE ACCURATE BUT ARE PRESENTED WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. USERS MUST TAKE FULL RESPONSIBILITY FOR THEIR APPLICATION OF ANY PRODUCTS.

INFORMATION PROVIDED IN THIS GUIDE IS PROVIDED "AS IS" WITH ALL FAULTS. TIMES SOFTWARE DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OR ARISING FROM A COURSE OF DEALING, USAGE OR TRADE PRACTICE.

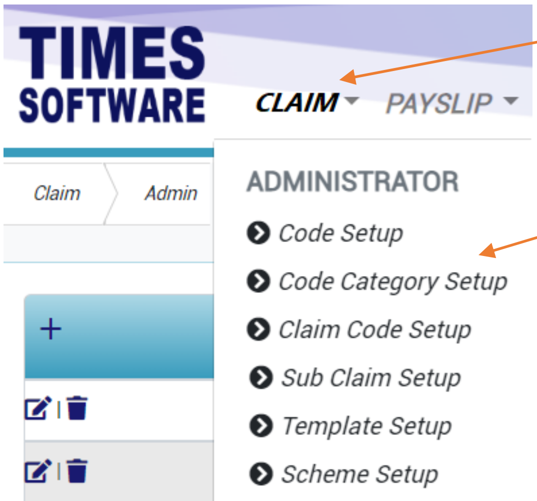
IN NO EVENT SHALL TIMES SOFTWARE OR ITS SUPPLIERS BE LIABLE FOR ANY DIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, INDIRECT OR PUNITIVE DAMAGES, OR ANY DAMAGES WHATSOEVER, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR LOSS OR DAMAGE TO DATA ARISING OUT OF THE USE OR INABILITY TO USE THIS USER GUIDE, OR ANY ERRORS OR OMISSIONS IN THE CONTENT THEREOF, EVEN IF TIMES SOFTWARE OR ITS SUPPLIERS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Unless otherwise noted, the example companies, organizations, products, domain names, email addresses, logos, people, places and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, email address, logo, person, place or event is intended or should be inferred. Any workflows, display output, diagrams and other figures included in this user guide are shown for illustrative purposes only.

The TIMES service and products identified in this user guide are trademarks or service marks of TIMES SOFTWARE. All other products or services referenced in this user guide may be the trademarks or service marks of their respective owners.

Code Setup

You can create and manage master codes in **Code Setup**. Codes defined here are used to populate drop-down lists in the TIMES PRO Claim system.



Click on the **CLAIM** menu to access the menu list.

Click on **Code Setup** to access the web page.

Figure 1 TIMES PRO Claim Administrator menu

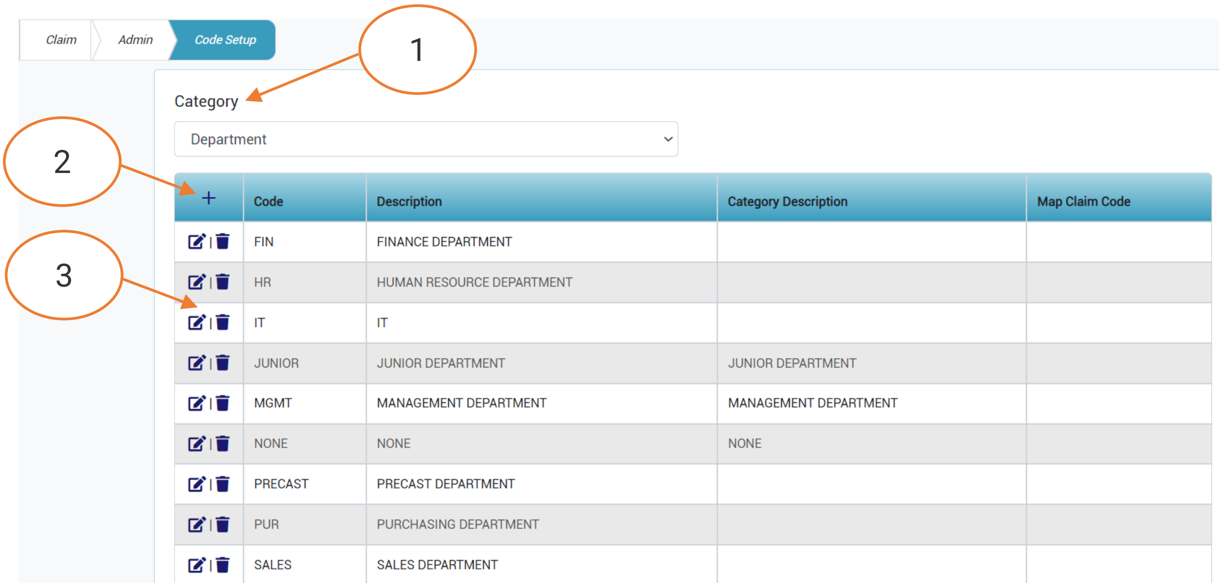
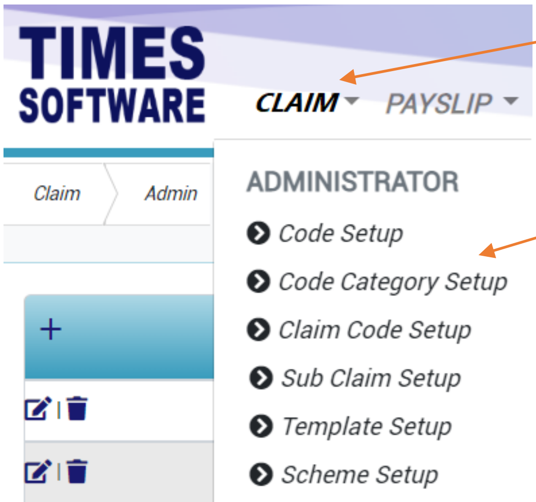


Figure 2 Code setup webpage sample

1	Choose a **Category** for the codes.
2	Click on the + **Add** button to create a new code.
3	If you want to edit an existing code, click on the **Edit** button. To delete a code, click on the **Delete** button.

Code Category Setup

You can create a new category of codes in **Code Category Setup.**



Click on the **CLAIM** menu to access the menu list.

Click on **Code Category Setup** to access the web page.

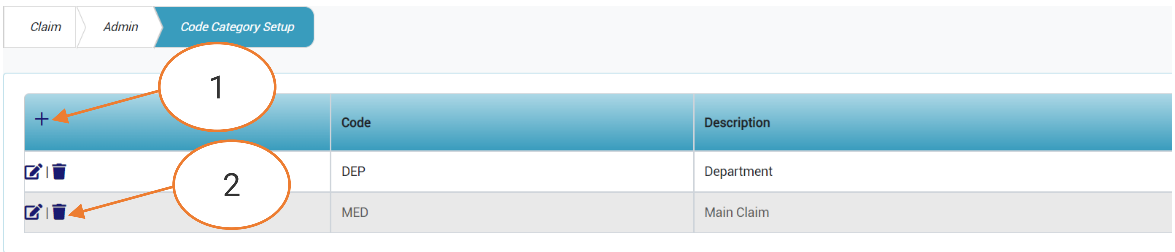
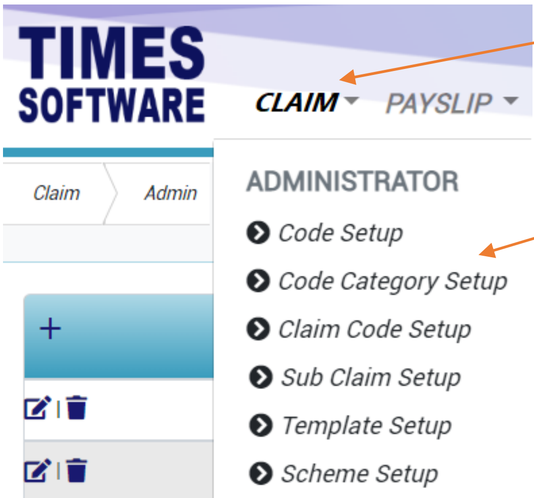


Figure 3 Code category setup webpage sample

1	Click on the **Add** button to create a new **Category Code** and **Description**. Click Save **Save** button to save the new category or Cancel **Cancel** button to cancel the transaction.
2	If you want to edit an existing code, click on the **Edit** button. To delete a code, click on the **Delete** button.

Claim Code Setup

You can create or manage claim codes in **Claim Code Setup** that can be applied by your organisation's employees in the system. You can setup different categories of claim types for each **Benefit Scheme**.



Click on the **CLAIM** menu to access the menu list.

Click on **Claim Code Setup** to access the web page.

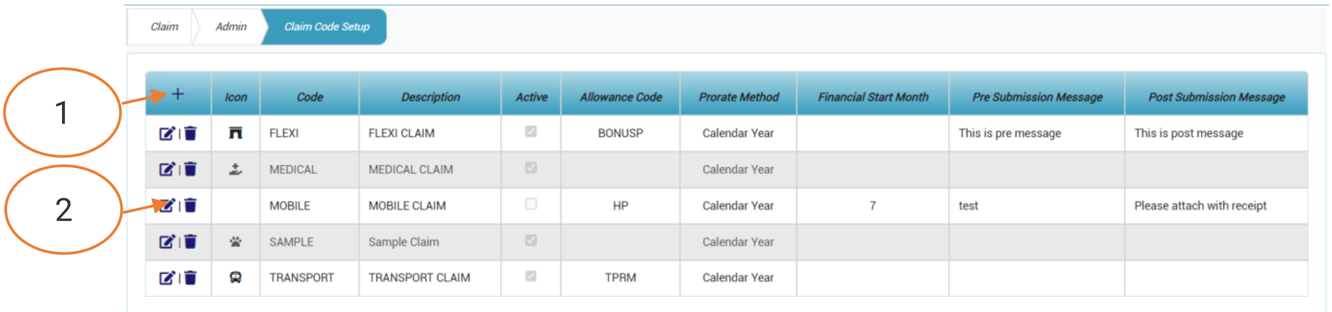


Figure 4 TIMES PRO Claim Code Setup web page sample

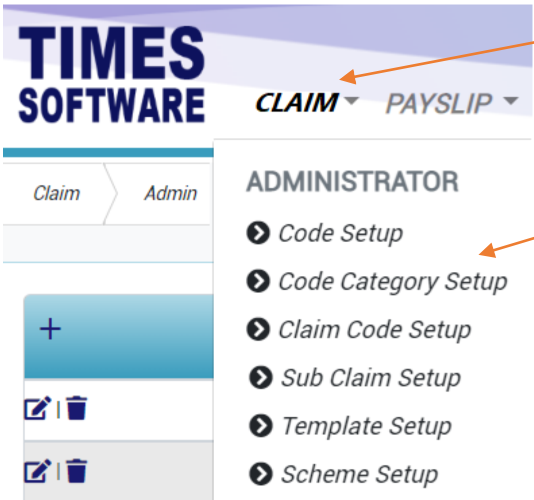
1	Click on the + **Add** button to create a new **Claim Code** and its other settings. Click Save **Save** button to save the new claim code or Cancel **Cancel** button to cancel the transaction. There are many settings to take note and they are explained in the chapter **Understanding the Claim Code Setup columns**
2	If you want to edit an existing code, click on the **Edit** button. To delete a code, click on the **Delete** button.

Understanding the Claim Code Setup columns

Column Name	Description
Icon	The administrator can select an **Icon** to indicate the claim type as well as to reinforce the message with a visual explanation.
Code	The administrator can select the **Claim Type** that was created earlier and map with the **Allowance Code** and **Description**.
Description	The administrator can setup a **Description** for each claim type.
Allowance Code	The administrator can setup an **Allowance Code** for each claim type.
Active	When the administrator tick on the checkbox for '**Active**', the employee will be able to apply for the claim code with their entitlement. If the claim code is inactive ('Active' checkbox is not ticked), the employee will not be able to apply for the claim code.
Travel Request	Tick the checkbox if the claim application is a **Travel Request**.
Travel Expense	Tick the checkbox if the claim application is a **Travel Expense**.
Prorate Method	The administrator can choose the **Prorate Method** for the claim setting. **Calendar Year:** The employees' claim entitlement will be prorated according to their hired date (by calendar). **Financial Year:** The employees' claim entitlement will be prorated according to their service month and the cut off is in the last month of the company's financial period.
Financial Start Month	The administrator to setup the month of financial year starts.
Pre Submission Message	The administrator can setup the **Pre Submission Message** before claim submission.
Post Submission Message	The administrator can setup the **Post Submission Message** after claim submission.

Sub Claim Setup

This sub chapter explains the functions and purposes for each of the **Sub Claim Setup**'s standard columns.



Click on the **CLAIM** menu to access the menu list.

Click on **Sub Claim Setup** to access the web page.

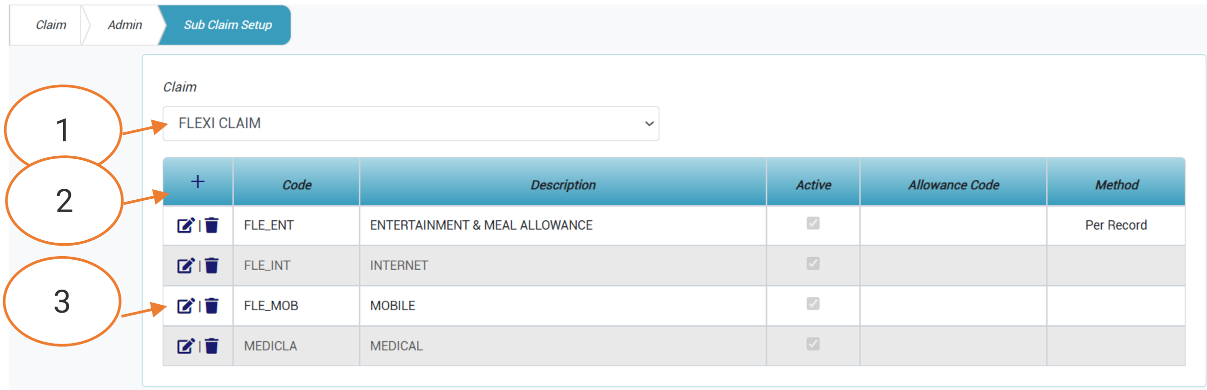


Figure 5 TIMES PRO Sub Claim Code Setup web page sample

1	Choose the **Claim** to view and edit the list of claim settings.
2	Click on the + **Add** button to create a new **Claim Code** and its other settings. Click Save **Save** button to save the new sub claim code or Cancel **Cancel** button to cancel the transaction. There are many settings to take note and they are explained in the chapter **Understanding the Sub Claim Code Setup** columns.
3	If you want to edit an existing code, click on the **Edit** button. To delete a code, click on the **Delete** button.

Understanding the Sub Claim Code Setup columns

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Code</td><td>This is the code of the Sub Claim Form. It is a unique identifier and can be any code.</td></tr>
<tr><td>Description</td><td>This is the name of the Sub Claim Form.</td></tr>
<tr><td>Active</td><td>When the administrator tick on the checkbox for ‘Active’, the employee will be able to apply for the sub claim code with their entitlement.

If the sub claim code is inactive (‘Active’ checkbox is not ticked), the employee will not be able to apply for the sub claim code.</td></tr>
<tr><td>Allowance Code</td><td>The administrator can setup an Allowance Code for each sub claim type.</td></tr>
<tr><td>Method</td><td>“Method” specifies how to cap the sub claim limit.
<table>
<tr><th>Method</th><th>Purpose</th></tr>
<tr><td>Per Record</td><td>Limit the amount that can be claimed per row of record in the Claim Form.</td></tr>
<tr><td>Per Transaction</td><td>Limit the amount that can be claimed per Claim Form.</td></tr>
<tr><td>Per Day</td><td>Limit the amount that can be claimed per day.</td></tr>
<tr><td>Per Month</td><td>Limit the amount that can be claimed per calendar month.</td></tr>
<tr><td>Once Per Month</td><td>Limit the amount that can be claimed per calendar month and only one Sub Claim Form can be submitted per calendar month.</td></tr>
<tr><td>Per Year</td><td>Limit the amount that can be claimed per calendar or financial year depending on the Claim Template’s, which the Sub Claim is based from, “Prorate Method” in Define Setting web page.</td></tr>
<tr><td>Once Per Year</td><td>Limit the amount that can be claimed per calendar or financial year depending on the Claim Template’s, which the Sub Claim is based on “Prorate Method” in Define Setting web page and only one</td></tr>
</table></td></tr>
</table>

Column Name	Description	
		Sub Claim Form can be submitted per calendar or financial year.
	Block Year	Limit the amount that can be claimed per blocks of years. Once this method is selected the "Block Year" column can be used.
	Once Block Year	Limit the amount that can be claimed per blocks of years depending on the Claim Template's, which the Sub Claim is based on "Prorate Method" in **Define Setting** web page and only one Sub Claim Form can be submitted per blocks of years.
Benefit Scheme	Either employees who have this claim benefit scheme can use this Sub Claim Form or the form can be opened to all employees.	

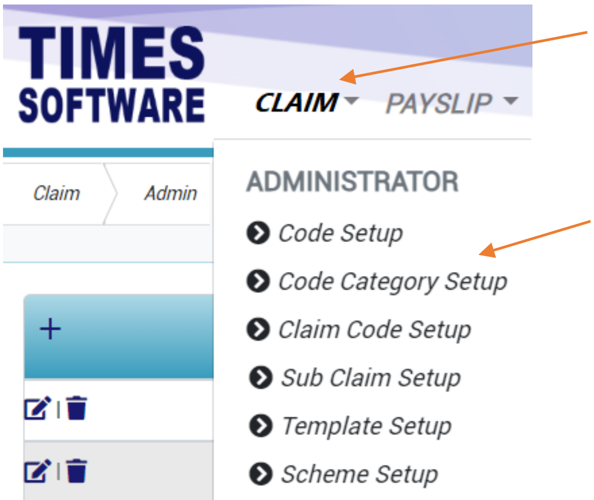
Template Setup

Alert: This chapter is technically complex.

In a standard implementation the system will be installed with preset templates that are tailored to your organisational needs. However, you can still create and customized your own templates.

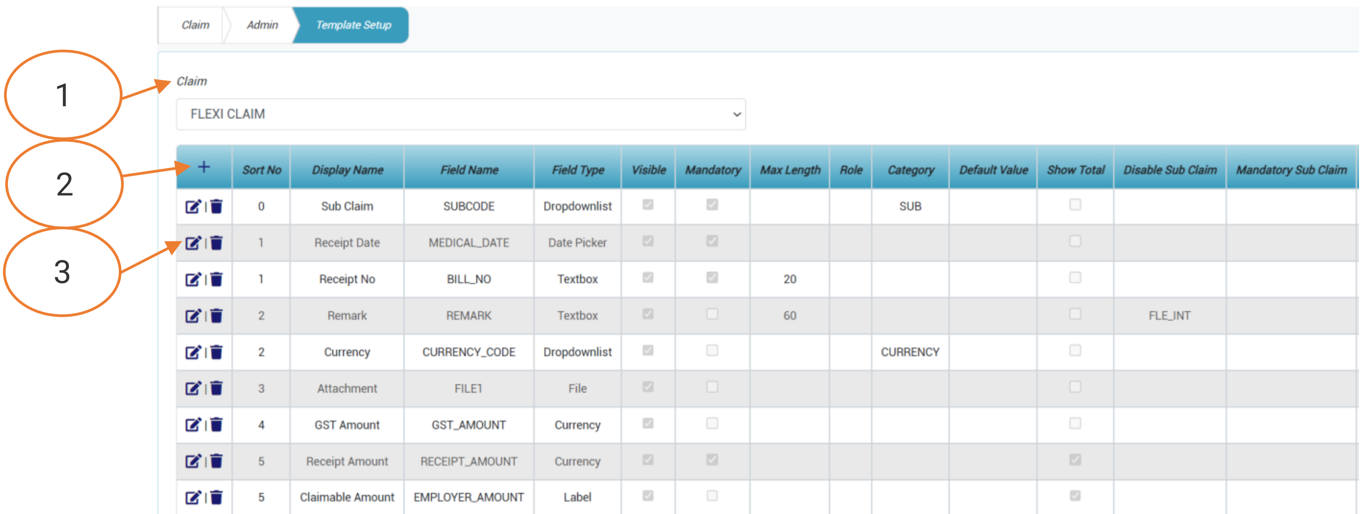
In the **Template Setup** web page, you can create and manage xml template files which will be used to create Claim Templates in the system. The xml template files contain configurations of database fields, field types, rulesets and formulas that shape the Claim Forms for employees to use.

Click on the **Template Setup** option in the Administrator menu to access the Template Setup web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Template Setup** to access the web page.



+	Sort No	Display Name	Field Name	Field Type	Visible	Mandatory	Max Length	Role	Category	Default Value	Show Total	Disable Sub Claim	Mandatory Sub Claim
	0	Sub Claim	SUBCODE	Dropdownlist					SUB				
	1	Receipt Date	MEDICAL_DATE	Date Picker									
	1	Receipt No	BILL_NO	Textbox			20						
	2	Remark	REMARK	Textbox			60					FLE_INT	
	2	Currency	CURRENCY_CODE	Dropdownlist					CURRENCY				
	3	Attachment	FILE1	File									
	4	GST Amount	GST_AMOUNT	Currency									
	5	Receipt Amount	RECEIPT_AMOUNT	Currency									
	5	Claimable Amount	EMPLOYER_AMOUNT	Label									

Figure 6 TIMES PRO Template Setup web page sample

1	Choose the **Claim** to view and edit the list of claim settings.
2	Click on the + **Add** button to create a new template feature for **Claim Code** and its other settings. Click Save **Save** button to save the new template or Cancel **Cancel** button to cancel the transaction. There are many settings to take note and they are explained in the **Understanding the Template Setup columns**.
3	If you want to edit an existing code, click on the **Edit** button. To delete a code, click on the **Delete** button.

Understanding the Template Setup columns

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Sort No</td><td>The fields will be displayed in the Claim Form from left to right according to the ordering defined here. Order 1 indicates the first field to be displayed, followed by order 2 field and so on.</td></tr>
<tr><td>Display Name</td><td>This is the title / name of the field to be displayed in the Claim Form.</td></tr>
<tr><td>Field Name</td><td>This is a list of all available database fields that you can use to store and display information in the Claim Form. It is important to note that some of these database fields are reserved for a specific use only. They will be bolded in the list.
<table>
<tr><th>Field Name</th><th>Purpose</th></tr>
<tr><td>ACCOUNT_CODE</td><td>For Account Code only.</td></tr>
<tr><td>BILL_NO</td><td>Receipt Number only.</td></tr>
<tr><td>BOOLEAN1</td><td>For answering Yes or No, or True or False. Must use “Field Type” Checkbox.</td></tr>
<tr><td>BOOLEAN2</td><td>For answering Yes or No, or True or False. Must use “Field Type” Checkbox.</td></tr>
<tr><td>BOOLEAN3</td><td>For answering Yes or No, or True or False. Must use “Field Type” Checkbox.</td></tr>
<tr><td>CO_PAYMENT</td><td>To indicate whether there is co-payment only. Must use “Field Type” Checkbox.</td></tr>
<tr><td>COMPANY</td><td>For Company Code only.</td></tr>
<tr><td>COST_CENTRE</td><td>For Cost Centre only.</td></tr>
<tr><td>COUNTRY_CODE</td><td>For Country Code only.</td></tr>
<tr><td>CURRENCY_CODE</td><td>For Currency Code only.</td></tr>
<tr><td>CURRENCY1</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY2</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY3</td><td>For Distance / Mileage used in Transport Claim only. For other types of claims this field can be used for any number values (support decimals).</td></tr>
<tr><td>CURRENCY4</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY5</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY6</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY7</td><td>Any number values (support decimals).</td></tr>
<tr><td>CURRENCY8</td><td>Any number values (support decimals).</td></tr>
</table></td></tr>
</table>

Column Name	Description	
	CURRENCY9	Any number values (support decimals).
	CURRENCY10	Any number values (support decimals).
	DATE1	Any date.
	DATE2	Any date.
	DATE3	Any date.
	DAYFREQ	Any number values (support decimals).
	DEPARTURE	For departure location.
	DEPENDANT	For dependant’s name.
	DESTINATION	For destination location.
	DIAGNOSIS	For medical diagnosis results.
	DOCTOR_NAME	For doctor’s name.
	EE_DEP	**For employee’s dependant’s identification number only.**
	EMPLOYER_AMOUNT	**For Receipt Net Claimable Amount only.**
	END_DATE	Any date however can be used in conjunction with “START_DATE” to calculate the period.
	END_TIME	Any time however can be used in conjunction with “START_TIME” to calculate the duration.
	EXCHANGE_RATE	**For Currency Exchange Rate only.**
	FILE1	**For attachments only. Use “Field Type” *FileUpload*.**
	FILE2	**For attachments only. Use “Field Type” *FileUpload*.**
	FILE3	**For attachments only. Use “Field Type” *FileUpload*.**
	FOREIGN_CURRENCY	For Foreign Currency Code.
	GST_AMOUNT	**For GST amount only.**
	HOSP_CLINIC	**For Hospital or Clinic Name only.**
	HRFREQ	Any number values (support decimals).
	HRFREQ1	Any number values (support decimals).
	INSURANCE_NO	For insurance number.
	JOB_CODE	For Job Code.
	MC_DAYS	For number of days of medical leave.

Column Name	Description	
	MC_GRANTED	For answering Yes or No for granting medical leave.
	MEDICAL_DATE	**Receipt Date only.**
	MESSAGE	For message.
	MILEAGE_AMOUNT	**The Mileage Amount for Transport Claim only.**
	NOTE	**The purpose or description of the claim only.**
	OTHOUR	For number of overtime hours.
	OTTYPE	For overtime rate.
	OTTYPE1	For overtime rate.
	PATIENT_TYPE	For indicating type of patient, accepts single character.
	PREILLNESS	**For Health Diagnosis and Illness only.**
	PRJ_CODE	**For Project Code only.**
	RECEIPT_AMOUNT	**For Gross Total of Receipt only.**
	REFER_TO_PANEL	For answering Yes or No to refer to panel doctor.
	REMARK	**User's remarks only.**
	SECTOR_CODE	For Sector Code.
	START_DATE	Any date however can be used in conjunction with "END_DATE" to calculate the period.
	START_TIME	Any time however can be used in conjunction with "END_TIME" to calculate the duration.
	STRING1	**The Mode of Transport for Transport Claim only. For other types of claims this field can be used for any text information.**
	STRING2	Any text information.
	STRING3	Any text information.
	STRING4	Any text information.
	STRING5	Any text information.
	STRING6	Any text information.
	STRING7	Any text information.
	STRING8	Any text information.

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><td>STRING9</td><td>Any text information.</td></tr>
<tr><td>STRING10</td><td>Any text information.</td></tr>
<tr><td>SUBCODE</td><td>Use only if the Claim Template will have sub claim forms. Must define “Field Type” Dropdownlist, “Visible” Yes, “Editable” Yes, “Required” Yes and “Category” SUB.</td></tr>
<tr><td>TIMESTAMP1</td><td>For time. Use “Field Type” Time.</td></tr>
<tr><td>TIMESTAMP2</td><td>For time. Use “Field Type” Time.</td></tr>
<tr><td>TIMESTAMP3</td><td>For time. Use “Field Type” Time.</td></tr>
<tr><td>VISIT_DATE</td><td>For date of visit.</td></tr>
</table>
</td></tr>
<tr><td>Field Type</td><td>This is a list of available field types that will determine the behaviour of the fields in the Claim Form.
<table>
<tr><th>Field Type</th><th>Purpose</th></tr>
<tr><td>AutoComplete</td><td>A wild card search. User types in a word or two into the search and the search produces a list of results that contains those words. User can then choose one of the results.

Must define a category code in “Category” to link the field to a list of codes.</td></tr>
<tr><td>AutoRunningNumber</td><td>A sequential number that starts at 1 and increments by 1 for each line of transactional record.</td></tr>
<tr><td>CheckBox</td><td>A checkbox where the user can click on it to tick or untick it.</td></tr>
<tr><td>Currency</td><td>Allows entry of numbers with decimals.</td></tr>
<tr><td>Datepicker</td><td>A field that provides a Calendar Picker, which is an interactive calendar in a small overlay, for the user to choose a date.</td></tr>
<tr><td>Dropdownlist</td><td>Clicking on the field produces a list of items and the user chooses one item from the list.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>Must define a category code in “Category” to link the field to a list of codes.</td></tr>
<tr><td>Expense</td><td>A special field reserved for the TIMES Travel system’s Expenses Sub Claim Form.</td></tr>
<tr><td>FileUpload</td><td>User can choose a file to upload into the system.

This “Field Type” is used exclusively in FILE1, FILE2 and FILE3 fields.</td></tr>
<tr><td>Numeric</td><td>Allows entry of whole numbers without decimals.

However, this does not apply to EXCHANGE_RATE field which allows 7 decimal points even if it uses this field type.</td></tr>
<tr><td>ReadOnly</td><td>Displays information and do not allow data entry. Mainly used for showing automatically calculated values by the system.</td></tr>
<tr><td>Textbox</td><td>A box for the user to key in any text information.</td></tr>
<tr><td>Time</td><td>Allows entry of time value in the format HH:MM.</td></tr>
</table>
</td></tr>
<tr><td>Visible</td><td>To show or hide the field in the Claim Form. Tick on “Visible” if you want to view this field and untick for the other way around.</td></tr>
<tr><td>Mandatory</td><td>To indicate if this field is a mandatory field that the user must select or fill in. Tick on “Mandatory” if you want to view this field and untick for the other way around.</td></tr>
<tr><td>Max Length</td><td>Specify the length of the field in pixels.</td></tr>
<tr><td>Role</td><td>When specific role is selected, the selected role will be able to view the claim details during apply or edit the claim form.

Please take note that without selecting any role, the column will be accessible for all roles. (i.e if you select only the Employee role,</td></tr>
</table>

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td></td><td>which means the Supervisor and HR role will not be able to input the value)</td></tr>
<tr><td>Category</td><td>Map the defined category code to “Category” in order to link the field to a list of codes.</td></tr>
<tr><td>Default Value</td><td>Specify manually on the Default Value for the claim form.

Please take note that do not specify this value if the “Expression” is used.

Common Global Category Codes

Here is a list of commonly used Global Category Codes that you can use in the Template Setup’s “Category” column. Do note that this list is not exhaustive and is subjected to change.

<table>
<tr><th>Category Code</th><th>Purpose</th></tr>
<tr><td>ADV</td><td>Advertisements.</td></tr>
<tr><td>AST</td><td>Company assets.</td></tr>
<tr><td>AWD</td><td>Company awards.</td></tr>
<tr><td>BEF</td><td>Employee benefits.</td></tr>
<tr><td>BEN</td><td>TIMES Claim Benefit Schemes.</td></tr>
<tr><td>BIC</td><td>Banks.</td></tr>
<tr><td>BRH</td><td>Company branches.</td></tr>
<tr><td>CAT</td><td>Employee categories.</td></tr>
<tr><td>CAU</td><td>Cause of injuries.</td></tr>
<tr><td>CLS</td><td>Employee classifications.</td></tr>
<tr><td>COM</td><td>Companies.</td></tr>
<tr><td>COU</td><td>Educational institutions.</td></tr>
<tr><td>CST</td><td>Cost centre.</td></tr>
<tr><td>CTY</td><td>Countries.</td></tr>
<tr><td>CUR</td><td>Currencies.</td></tr>
<tr><td>DEG</td><td>Education certificates.</td></tr>
<tr><td>DEP</td><td>Company departments.</td></tr>
<tr><td>DIA</td><td>Illness diagnosis.</td></tr>
<tr><td>DIV</td><td>Company divisions.</td></tr>
<tr><td>EDU</td><td>Education.</td></tr>
<tr><td>HOS</td><td>Hospitals and health institutions.</td></tr>
<tr><td>INS</td><td>Insurances.</td></tr>
<tr><td>JOB</td><td>Employee job grades.</td></tr>
<tr><td>LEA</td><td>Types of leaves.</td></tr>
<tr><td>LOC</td><td>Locations.</td></tr>
</table>
</td></tr>
</table>

Column Name	Description

LSC	TIMES Leave Leave Schemes.
LVL	Employee job levels.
MAJ	Academic majors.
MED	Types of claims.
NAT	Nationalities.
OCU	Employee occupations.
ORG	Organisations.
OVL	Employee appraisal grades.
PRJ	Projects.
PRO	Employee career progressions.
RAC	Races.
RE	Relationships.
REL	Religions.
SEC	Employee sections.
SEX	Genders.
SUB	Sub Claim.
SVS	Employee service grades.
TEN	Employee tenure of service.
TER	Employee resignation reasons.
TPT	Modes of transportation.

Common Expressions

Here is a list of EMPLOYEE table fields that are commonly used in the Template Setup's "Expression" column. Do note that this list is not exhaustive and is subjected to change.

Specific "Expression" can be used for specific global category code.

EMPLOYEE Table Field defined in "Expression"	Purpose	Used in conjunction with Global Category Code
EMPLOYEE.SEX	Employee's gender.	SEX
EMPLOYEE.RACE_CODE	Employee's race.	RAC
EMPLOYEE.NATIONAL_CODE	Employee's nationality.	NAT
EMPLOYEE.RELIGION_CODE	Employee's religion.	REL

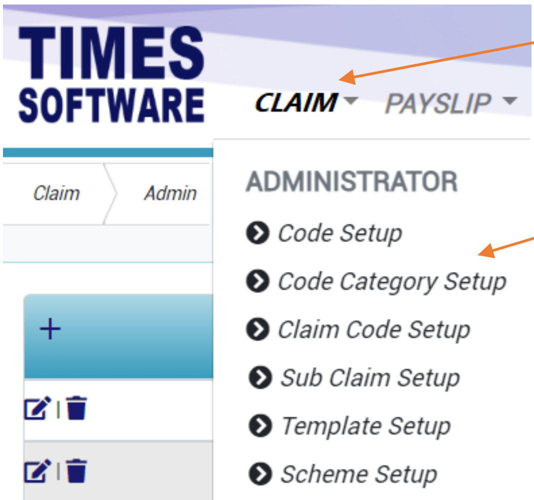
<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><td>EMPLOYEE.LOCATION_CODE</td><td>Employee's location.</td><td>LOC</td></tr>
<tr><td>EMPLOYEE.BRANCH_CODE</td><td>Employee's branch.</td><td>BRH</td></tr>
<tr><td>EMPLOYEE.DIVISION_CODE</td><td>Employee's division.</td><td>DIV</td></tr>
<tr><td>EMPLOYEE.DEPARTMENT_CODE</td><td>Employee's department.</td><td>DEP</td></tr>
<tr><td>EMPLOYEE.CATEGORY_CODE</td><td>Employee's category.</td><td>CAT</td></tr>
<tr><td>EMPLOYEE.COST_CENTRE_CODE</td><td>Employee's cost centre.</td><td>CST</td></tr>
<tr><td>EMPLOYEE.SECTION_CODE</td><td>Employee's section.</td><td>SEC</td></tr>
<tr><td>EMPLOYEE.CLASSIFICATION_CODE</td><td>Employee's classification.</td><td>CLS</td></tr>
<tr><td>EMPLOYEE.OCCUPATION_CODE</td><td>Employee's occupation.</td><td>OCU</td></tr>
<tr><td>EMPLOYEE.EDUCATION_C0DE</td><td>Employee's education.</td><td>EDU</td></tr>
<tr><td>EMPLOYEE.JOB_GRADE_CODE</td><td>Employee's job grade.</td><td>JOB</td></tr>
<tr><td>EMPLOYEE.DOBCTRY</td><td>Employee's country of birth.</td><td>CTY</td></tr>
<tr><td>EMPLOYEE.LEAVE_SCHEME</td><td>Employee's leave scheme.</td><td>LSC</td></tr>
<tr><td>EMPLOYEE.BENEFIT_SCHEME</td><td>Employee's benefit scheme.</td><td>BEN</td></tr>
<tr><td>EMPLOYEE.COMPANY_CODE</td><td>Employee's company.</td><td>COM</td></tr>
</table>
</td></tr>
<tr><td>Show Total</td><td>To show the total amount of the field for the entire Claim Form into a grand total.</td></tr>
<tr><td>Disable Sub Claim</td><td>When a Sub Claim is selected, the column will be disabled from the claim form, user will not be able to edit the selected column during apply or edit the claim form. Without selecting any sub claim, the column will enable for all the sub claims.

Please take notes:</td></tr>
</table>

Column Name	Description
	i. if the 'Default Value' for the column is set, when the selected sub claim for the column is disabled, the default value will not be shown. ii. the column will only disable after the user selected the sub claim during apply or edit in the claim form.
Mandatory Sub Claim	When **Sub Claim** is selected, the column will be mandatory for the selected sub claim.
Mail Visible	Tick on the checkbox to setup which column will be shown in the email for Mail Template Setup.
Receipt Visible	Tick on the checkbox to setup which column will be shown in the claim form receipt for Receipt Template Setup.

Scheme Setup

To setup reimburse limit and other criteria for different category of benefit schemes.



Click on the **CLAIM** menu to access the menu list.

Click on **Scheme Setup** to access the web page.

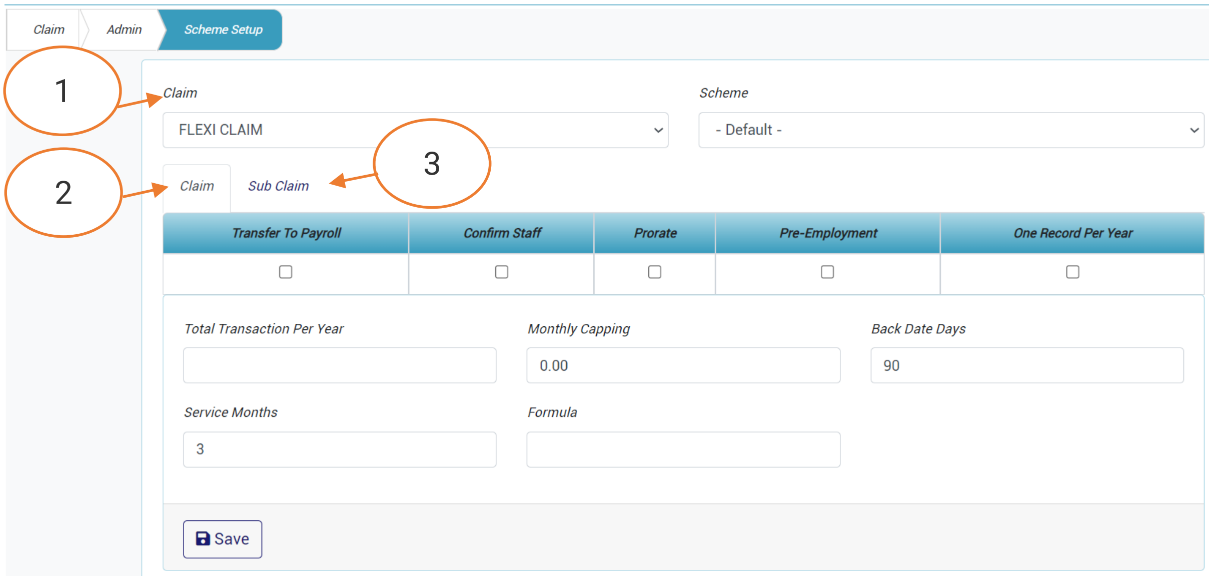


Figure 7 TIMES PRO Scheme Setup web page sample

1	Select **Claim** and **Scheme** in order to proceed with the Scheme Setup.
2	There are many scheme setting in Claim to take note and they are explained in the chapter **Understanding the Scheme Setup for Claim**
3	There are many scheme setting in Sub Claim to take note and they are explained in the chapter **Understanding the Scheme Setup for Sub Claim**

Understanding the Scheme Setup for Claim

Column Name	Description
Transfer To Payroll	Tick the checkbox to allow net claimable amount for this claim to transfer to payroll.
Confirm Staff	Tick the checkbox to allow confirmed employees only to be able to submit this claim.
Prorate	Tick the checkbox to allow employees to prorate claim for incomplete year of service.
Pre-Employment	Pre-Employment is referring to the employee that can submit a claim with a receipt date is before the employee join the company. If the administrator tick on the checkbox, the employee who under this benefit scheme will be able to submit their claim with a receipt date that is before his/her hired date.

Column Name	Description
One Record Per Year	Tick the checkbox to restrict employees to submit a single claim only per year.
Total Transaction Per Year	Limit the number of claim submissions per year. 0 indicates unlimited.
Monthly Capping	Limit the amount of claim that can be submitted per month not exceeding the employee's claim entitlement. 0 indicates no capping but the amount must not exceed the entitlement.
Back Date Days	Indicate the number of calendar days that a claim submission can back-date to. 0 indicates no restriction.
Service Months	Indicate the Service Months that the employee needs to fulfill in order to qualify for this claim entitlement.
Formula	**Configuring Claim with Computation Formula** This method is technically complex. You can specify special computation here for single Claim Form if this claim template does not have Sub Claims. The formula accepts simple equations between fields defined in the template's xml file. Here are some examples: *RECEIPT_AMOUNT = EMPLOYER_AMOUNT* (The amount in EMPLOYER_AMOUNT will be based on RECEIPT_AMOUNT) *RECEIPT_AMOUNT * 8% = GST_AMOUNT* (Amount in GST_AMOUNT is calculated based on the gross claim amount in RECEIPT_AMOUNT multiplying with 8 percent) *(RECEIPT_AMOUNT * 10%) + RECEIPT_AMOUNT = EMPLOYER_AMOUNT* (Calculate the 10% tax amount from the pre-tax gross claim amount in RECEIPT_AMOUNT. Then add the tax amount to the

Column Name	Description
	gross claim amount in RECEIPT_AMOUNT to calculate the net claimable amount in EMPLOYER_AMOUNT) **Configuring Transport Claim with Mileage Computation Formula** This method is technically complex. This sub chapter explains the method to setup the formula to automatically calculate the claimable amount based on distance travelled and type of vehicle used. Before you begin to design the **Mileage Computation Formula** into the transport claim template there are a few tasks that you need to complete first. They are: If the transport claim template has **Sub Claims**, you must define the formula at the “Formula” column for the specific **Sub Claim Form** in **Sub Claim Setup** web page. (For more information on setting up the Sub Claim Forms, refer to **Error! Reference source not found.**Sub Claim Setup.) Do not define the formula at the Configuration web page’s “Process Method Calculation” setting. The format for the **Mileage Computation Formula** is: *<Vehicle Code>:<Distance Range>?<Claimable Amount per 1 unit of distance travelled)* Ex: *CAR:0-100?0.65* Employee who travels in a car, from **0-100** KM/Miles, the claimable rate is at **$0.65** per KM/Mile travelled. If the employee has travelled **80** KM/Miles, then the claimable amount is 80 * $0.65 = **$52.00**.

Column Name	Description
	Multiple vehicles and multiple distance ranges per vehicle can be set with this example: *<First Vehicle Code>:<First Distance Range>?<First Claimable Amount per 1 unit of distance travelled),<First Vehicle Code>:<Second Distance Range>?<Second Claimable Amount per 1 unit of distance travelled), <First Vehicle Code>:<Third Distance Range>?<Third Claimable Amount per 1 unit of distance travelled), <Second Vehicle Code>:<First Distance Range>?<First Claimable Amount per 1 unit of distance travelled),<Second Vehicle Code>:<Second Distance Range>?<Second Claimable Amount per 1 unit of distance travelled), <Second Vehicle Code>:<Third Distance Range>?<Third Claimable Amount per 1 unit of distance travelled)* Ex: *CAR:0-100?0.65,CAR:101-300?0.85,CAR:301-99999?0.99,MOTOR:0-200?0.30,MOTOR:201-400?0.60,MOTOR:401-99999?0.80* For employees travelling in a car, the claimable rate is at **$0.65** per KM/Mile travelled for the first **100** KM/Miles, subsequent claimable rate is at **$0.85** per KM/Mile travelled from **101 – 300** KM/Miles and lastly the claimable rate is at **$0.99** per KM/Mile travelled from **301** KM/Miles onwards. If the employee has travelled **350** KM/Miles in a car, the claimable amount is (100 * $0.65) + (199 * $0.85) + (49 * $0.99) = $65.00 + $169.15 + $48.51 = **$282.66**. For employees travelling in a motorcycle, the claimable rate is at **$0.30** per KM/Mile travelled for the first **200** KM/Miles, subsequent claimable rate is at **$0.60** per KM/Mile travelled from **201 – 400** KM/Miles and lastly the claimable rate is at **$0.80** per KM/Mile travelled from **401** KM/Miles onwards.

Column Name	Description
	If the employee has travelled **450** KM/Miles in a motorcycle, the claimable amount is (200 * $0.30) + (199 * $0.60) + (49 * $0.80) = $60.00 + $119.40 + $39.20 = **$218.60**.

Understanding the Scheme Setup for Sub Claim

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Limit</td><td>Specify the claim amount limit or capping for the Sub Claim Form.</td></tr>
<tr><td>Block Year</td><td>Specify the number of years in blocks that the claim amount limit will be in effect. The system will use the employee’s hired date to determine when to start enforcing the block year claim amount limit.

Here is an example:

Sub Claim Form Description: Winter Clothing

Limit: $400.00

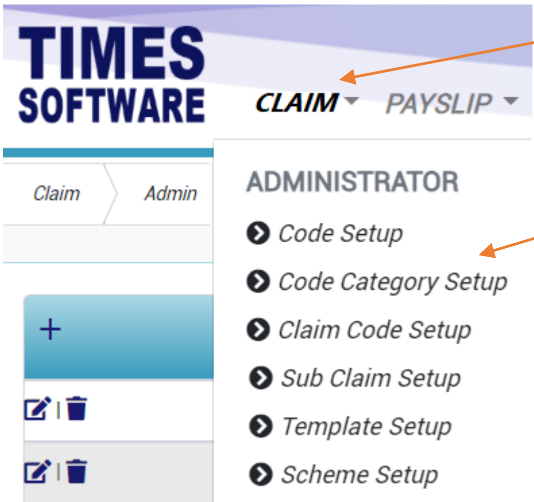
Block Year: 2

Employee Hired Date: 21st June, 2016

Employee can claim winter clothing expenses not exceeding $400.00 in total from 21st June, 2016 to 20th June, 2018. On 21st June, 2018 the employee can submit winter clothing expenses claims again not exceeding the total of $400.00 till 20th June, 2020.</td></tr>
<tr><td>Block Year Method</td><td>Select the computation of block year method, either by Anniversary or Calendar Year for sub-claim submission.<table><tr><th>Field Name</th><th>Purpose</th></tr><tr><td>Anniversary</td><td>The employees’ block year claim entitlement will be computed according to their date of join. For example, the employee joined on 1st July 2021,</td></tr></table></td></tr>
</table>

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>his/her anniversary will be from 1^{st} July 2021 to 30^{th} June 2022.</td></tr>
<tr><td>Calendar Year</td><td>The employees' block year claim entitlement will be computed according to the calendar year. A calendar year is a period of time that starts on 1^{st} January and ends on 31^{st} December of the same year. For example, the calendar year of 2022 starts from 1^{st} January 2022 to 31^{st} December 2022.</td></tr>
</table>
</td></tr>
<tr><td>Block Year Start Date</td><td>Specify the block year start date of the claim submission.
<table>
<tr><th>Field Name</th><th>Purpose</th></tr>
<tr><td>Hired Date</td><td>The block year claim submission is based on the joined date of the employee.</td></tr>
<tr><td>Receipt Date</td><td>The block year claim submission is based on the receipt date of the claim submission.</td></tr>
</table>
</td></tr>
<tr><td>Formula Type</td><td>Specify the formula type for claim computation.
<table>
<tr><th>Field Name</th><th>Purpose</th></tr>
<tr><td>Mathematic</td><td>The formula to compute the claimable amount based on mathematical formulae as per defined.</td></tr>
<tr><td>Mileage</td><td>The formula to compute the claimable amount based on distance travelled and type of vehicle used.</td></tr>
</table>
</td></tr>
<tr><td>Formula</td><td>Define the Formula to calculate the claimable amount.</td></tr>
<tr><td>Default Amount</td><td>Specify the default amount for claim.</td></tr>
</table>

Entitlement Setup



Click on the **CLAIM** menu to access the menu list.

Click on **Entitlement Setup** to access the web page.

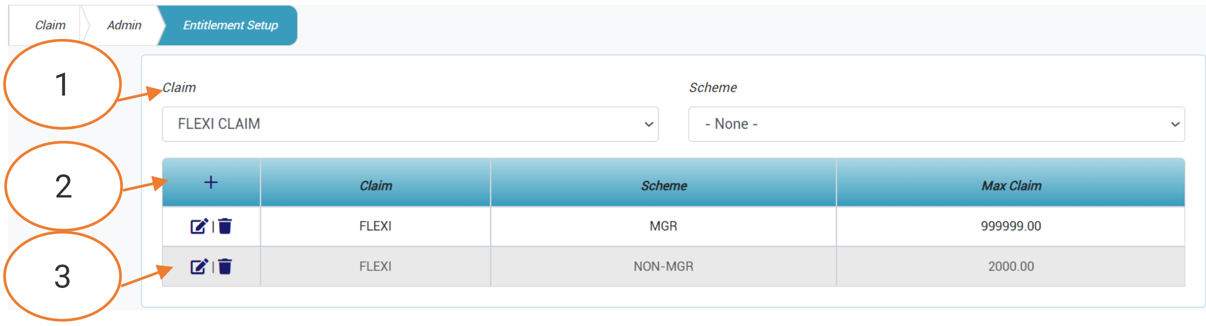
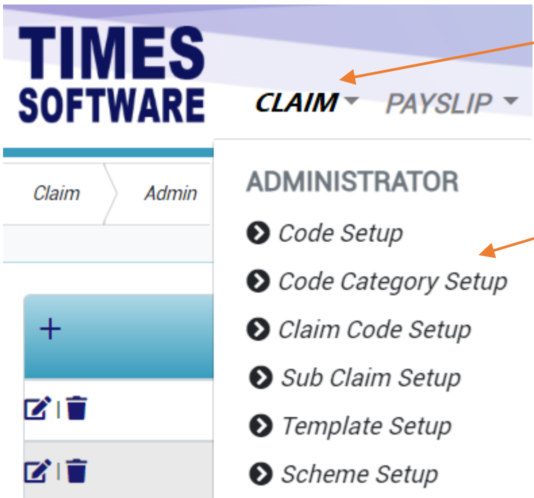


Figure 8 TIMES PRO Entitlement Setup web page sample

1	Select **Claim** and **Scheme** in order to proceed with the Entitlement Setup.
2	Click on the + **Add** button to create a new Claim Entitlement. Click Save **Save** button to save the new entitlement or Cancel **Cancel** button to cancel the transaction. Key in the maximum claim amount on ‘Entitlement’ textbox. Set as 99999999 for no limit.
3	If you want to edit an existing entitlement setting, click on the **Edit** button. To delete a code, click on the **Delete** button.

Adjust Entitlement

If the administrators need to make bulk updates to the database, using an Excel upload can be more efficient than updating the database record by record.



Click on the **CLAIM** menu to access the menu list.

Click on **Adjust Entitlement** to access the web page.

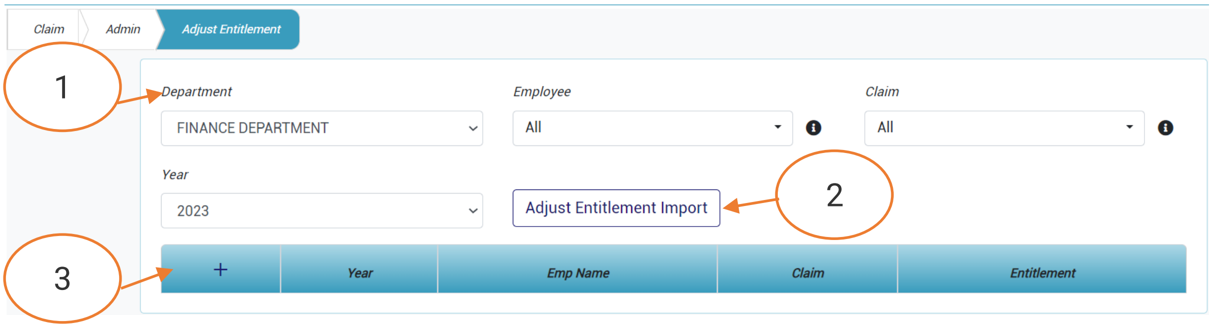


Figure 9 TIMES PRO Adjust Entitlement web page sample

<table>
<tr><td>1</td><td>Select Department, Employee, Claim and Year in order to proceed with the Adjust Entitlement.</td></tr>
<tr><td>2</td><td>Click on the Add button to create a new Claim Entitlement.
Click Save button to save the new adjust entitlement or Cancel button to cancel the transaction.
There are four steps to import the adjust entitlement.
<table>
<tr><th>Field Name</th><th>Purpose</th></tr>
<tr><td>Step 1:
Download Template</td><td>Download the Adjust Entitlement template in .xls format. Next, open the</td></tr>
</table>
</td></tr>
</table>

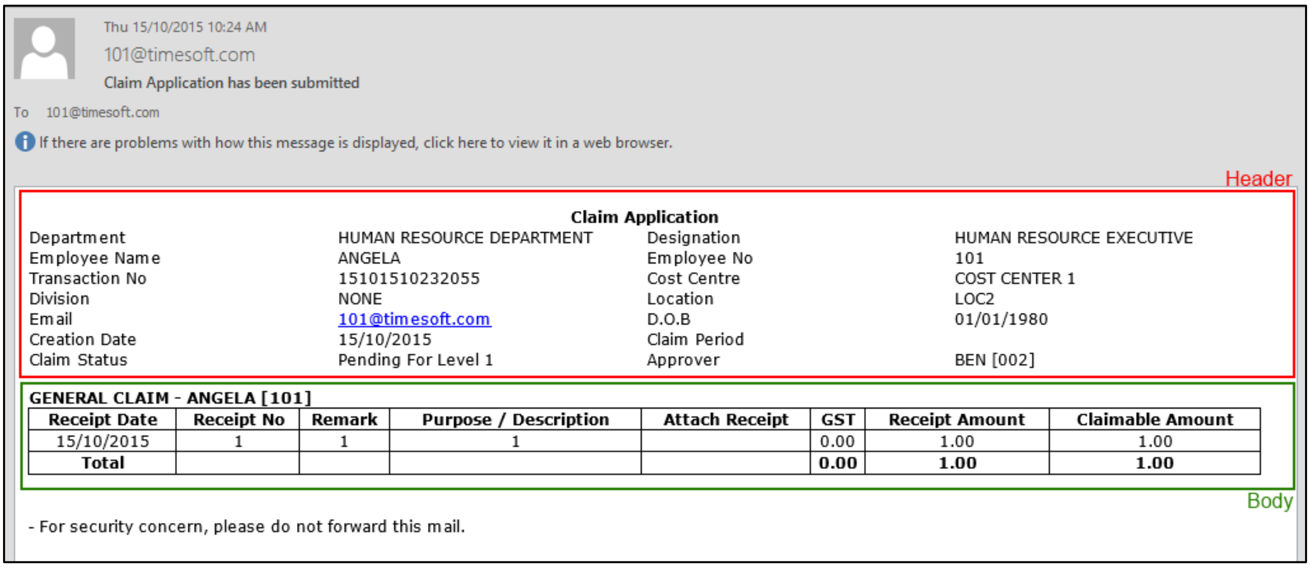
		excel document and enter the required fields.
	Step 2: Browse File	Click on the **File** icon to browse excel document from your PC.
	Step 3: Upload File	Once done, proceed to Step 3 and click on Upload **Upload** icon to upload the completed excel document.
	Step 4: Import	A message of "Successfully uploaded" will be prompted if Step 4 is completed.
3	If you want to edit an existing entitlement setting, click on the **Edit** button. To delete a code, click on the **Delete** button.	

Header Setup

With the Claim Templates, Sub Claim Forms (if applicable), Claim Rules, Claim Entitlements and Approval Flows setup completed, before employees can access their Claim Forms the system's automated emails need to be setup for each Claim Template.

The administrators need to first setup the header format for the email, followed by the email's body contents and lastly the email routing flow.

Here's a sample email format that illustrate the header and body portions of the email:



Thu 15/10/2015 10:24 AM
101@timesoft.com
Claim Application has been submitted
To 101@timesoft.com
If there are problems with how this message is displayed, click here to view it in a web browser.

Header

Claim Application

Department	HUMAN RESOURCE DEPARTMENT	Designation	HUMAN RESOURCE EXECUTIVE
Employee Name	ANGELA	Employee No	101
Transaction No	15101510232055	Cost Centre	COST CENTER 1
Division	NONE	Location	LOC2
Email	101@timesoft.com	D.O.B	01/01/1980
Creation Date	15/10/2015	Claim Period	
Claim Status	Pending For Level 1	Approver	BEN [002]

GENERAL CLAIM - ANGELA [101]

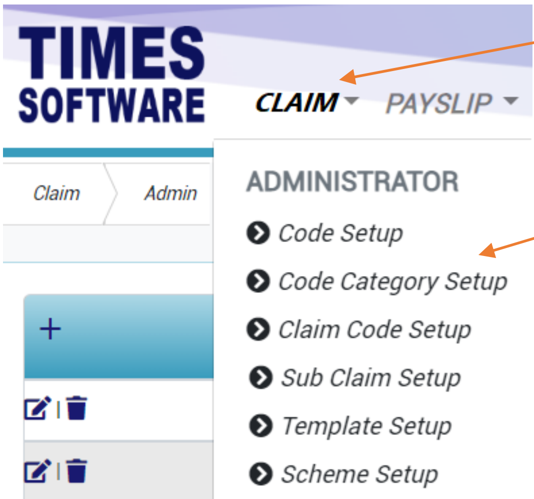
Receipt Date	Receipt No	Remark	Purpose / Description	Attach Receipt	GST	Receipt Amount	Claimable Amount
15/10/2015	1	1	1		0.00	1.00	1.00
Total					0.00	1.00	1.00

Body

- For security concern, please do not forward this mail.

Setting up Email Header

To start off we first create the email's header format.



Click on the **CLAIM** menu to access the menu list.

Click on **Header Setup** to access the web page.

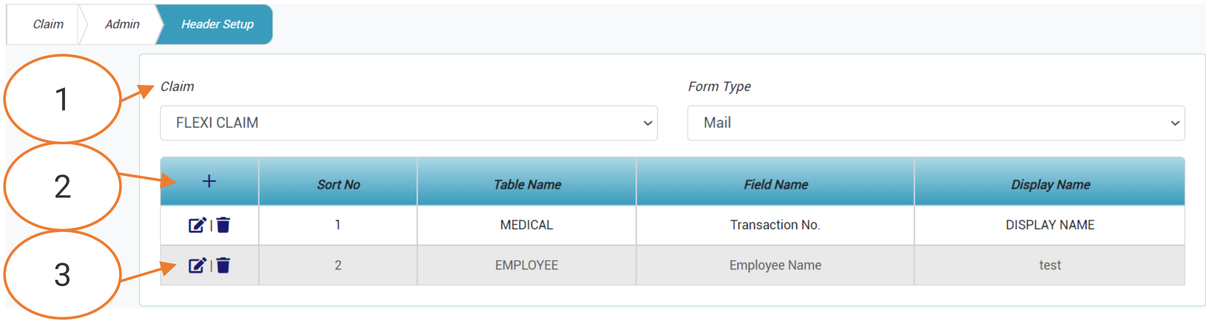


Figure 10 TIMES PRO Header Setup web page sample

1	Select **Claim** and **Form Type** in order to proceed with the Header Setup.
2	Click on the **Add** button to create a new claim header. Click Save **Save** button to save the new header setup or Cancel **Cancel** button to cancel the transaction. You can setup the header by Sort No, Table Name, Field Name and Display Name.
3	If you want to edit an existing header setting, click on the **Edit** button. To delete a code, click on the **Delete** button.

Click on the **Header Setup** option in the Administrator menu to access the Mail Header Setup web page.

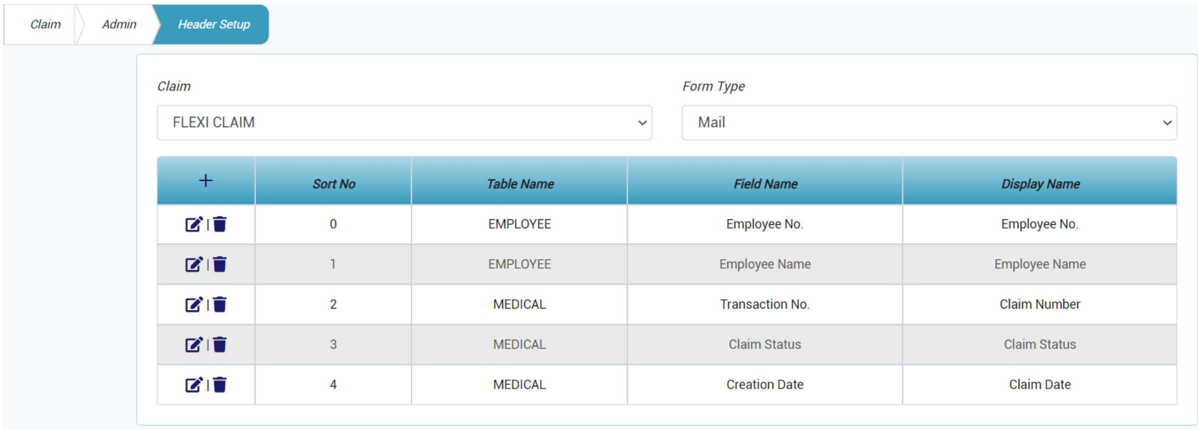


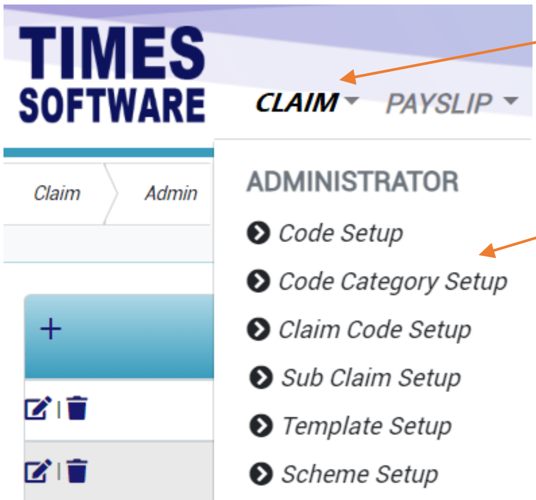
Figure 11 TIMES PRO Header Setup web page sample

With the new header created, click on the button to create new contents record for the header.

Choose the “**Table Name**” and “**Field Name**” for the location where the system will read from and name the content in “**Display Name**”. Then arrange the “**Field Name**” by the sequence of the “**Sort No**”.

Mail Route Setup

Once the email format setup completed, you can then begin to design the email routing at **Mail Route Setup** web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Mail Route Setup** to access the web page.

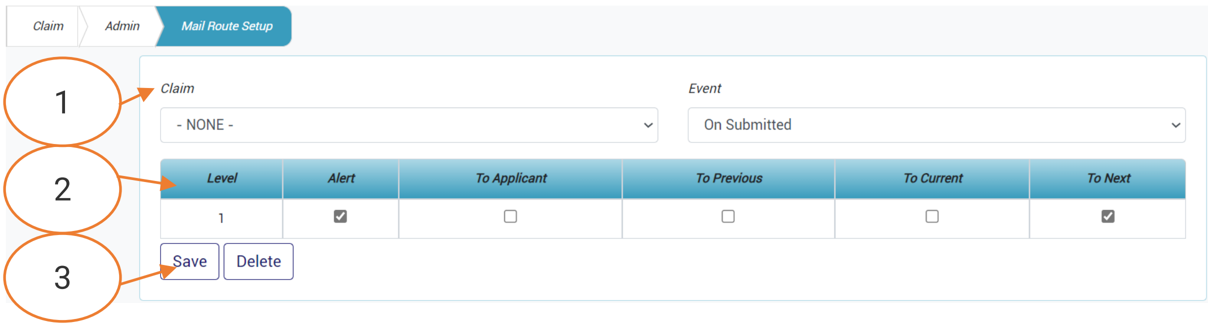


Figure 12 TIMES PRO Mail Route Setup web page sample

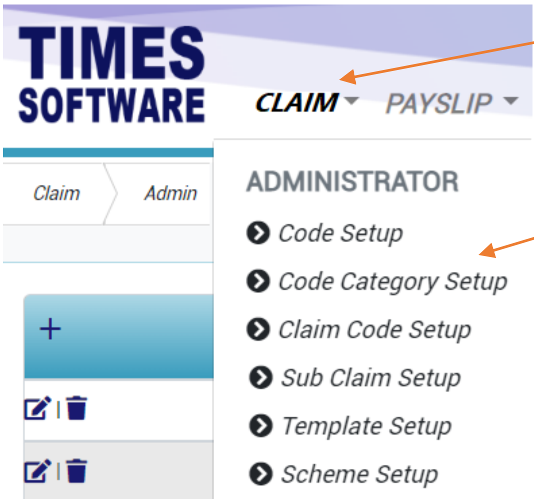
1	Select **Claim** and **Event** in order to proceed with the Mail Route Setup. Please note that you must create an email routing rule for every event.
2	You can setup the route by customizing the **Alert**, **To Applicant**, **To Previous**, **To Current** and **To Next**. There are many settings to take note and they are explained in the chapter **Understanding the Mail Route Setup columns**
3	Click Save **Save** button to save the new mail route or Delete **Delete** button to delete the transaction.

Understanding the Mail Route Setup columns

Column Name	Description
Alert	Tick on the checkbox to activate the email route record.
To Applicant	Tick on the checkbox to route the mail to applicant.
To Previous	Tick on the checkbox to route the mail to previous approver.
To Current	Tick on the checkbox to route the mail to current approver.
To Next	Tick on the checkbox to route the mail to next approver.

Supervisor Access

You can assign the rights for approvers to make changes to their reporting employees' submitted claim applications at **Supervisor Access** web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Supervisor Access** to access the web page.

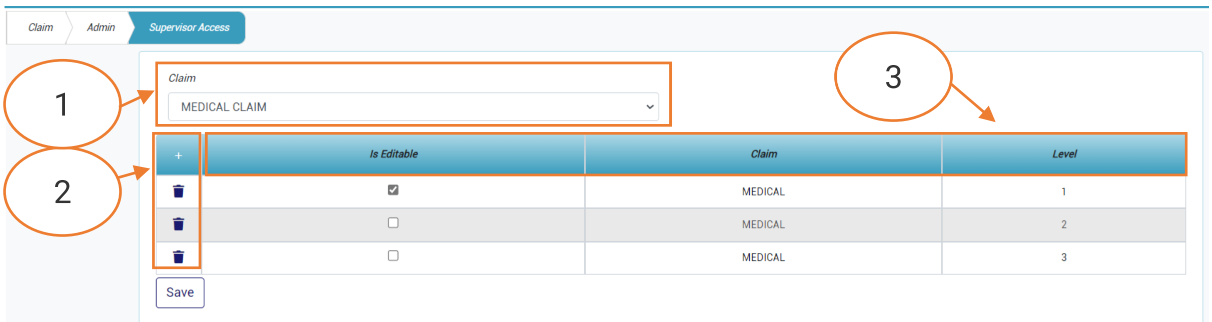


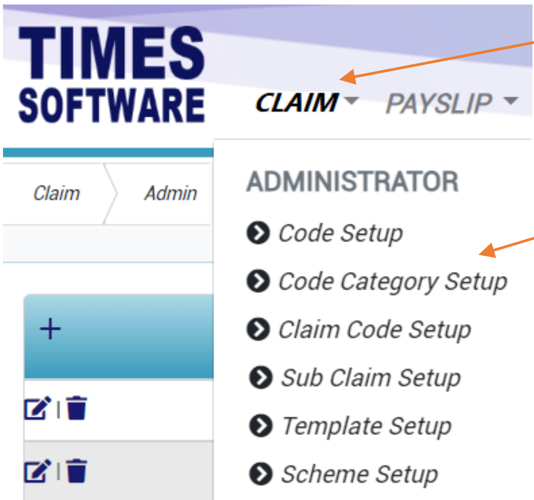
Figure 13 TIMES PRO Supervisor Access Setup web page sample

1	Select **Claim** to proceed with the Supervisor Access Setup.
2	Click **Add** button to allow the system to automatically create rows of record for the new templates. Click button to delete the record.
3	To allow an approver at a specific approval flow level to make changes to submitted claim applications, click checkbox under the column "Is Editable" to tick it. Then Save button to save the changes.

If you want to recover the deleted records, you need to first delete all records for the Claim Template and then click on the **Add** button to re-generate the records.

Currency Setup

For multi-currencies claims, you can setup and maintain the currency exchange rate table in Currency Setup web page for the system to refer to when the system performs a currency conversion.



Click on the **CLAIM** menu to access the menu list.

Click on **Currency Setup** to access the web page.

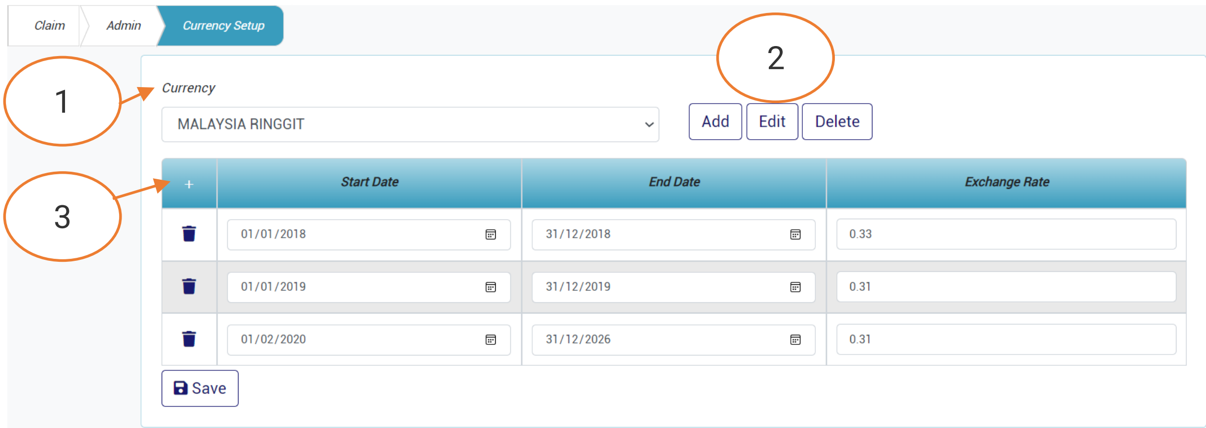


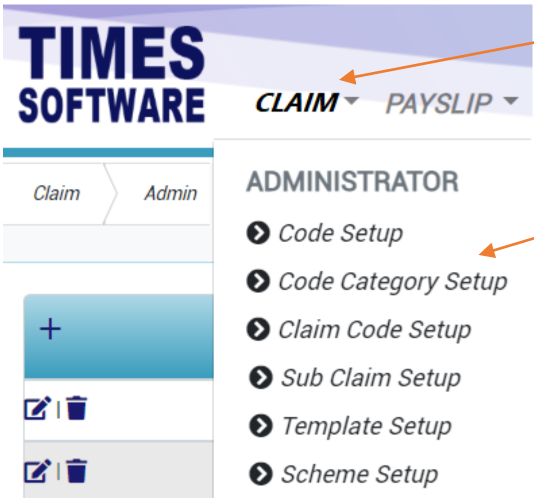
Figure 14 TIMES PRO Currency Setup web page sample

1	Select **Currency** in order to proceed with the Currency Setup. Please note that all exchange rate for each foreign currency defined here is based on the exchange rate of 1 unit of local currency to the foreign currency or the foreign currency's selling rate.
2	Click Add **Add** button to add the new currency. Click Edit **Edit** button to edit the **Description** of the existing currency. Click Delete **Delete** button to delete the existing currency. Click ← Cancel **Cancel** button to cancel the existing transaction.
3	You can setup the currency by customizing the **Start Date**, **End Date**, **Exchange Rate**. Enter the date range and the exchange rate. Click + **Add** button to add the new exchange rate details.

	Click Save **Save** button to save the changes. Click button to delete the record.

Per Diem Setup

Per diem allowance refers to the daily allowance given to employees on overseas trips (i.e. out of Singapore) for business purposes. They include trips made by the employees sent to attend overseas training and conferences.



Click on the **CLAIM** menu to access the menu list.

Click on **Per Diem Setup** to access the web page.

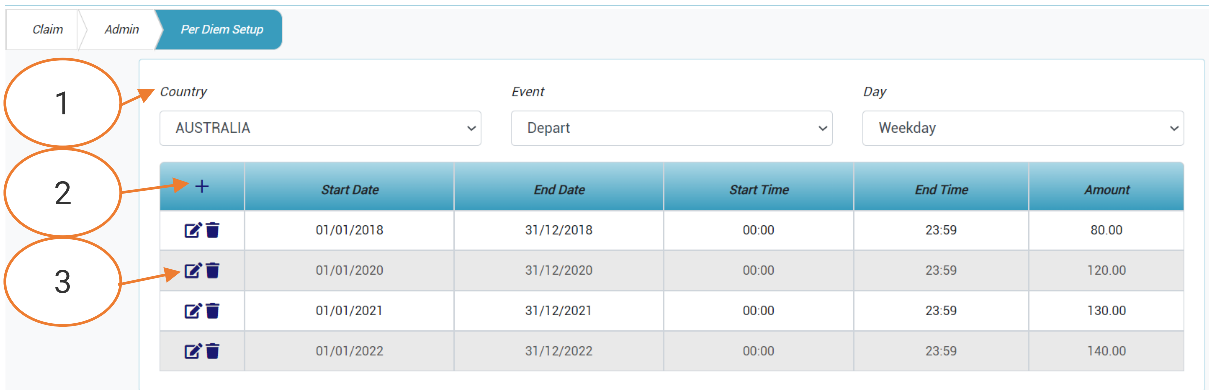


Figure 15 TIMES PRO Per Diem Setup web page sample

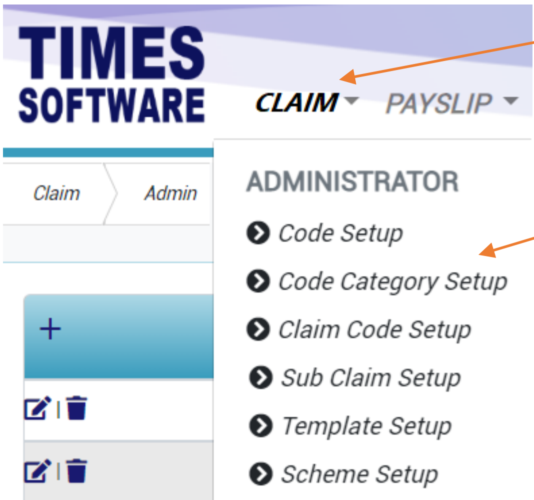
1	Select **Country, Event** and **Day** in order to proceed with the Per Diem Setup. Please take notes that Each type of "Day" must have 3 settings. One setting to define the "Departure Time" range for the departure day. Another setting to define

	the "Return Time" range for the return day. The last setting is to define the whole day setting without any "Departure Time" or "Return Time".
2	You can setup the Per Diem by customizing the **Start Date**, **End Date**, **Start Time**, **End Time** and **Amount**. Click **Add** button to new time frames for Per Diem claims. Click Save **Save** button to save the transaction or Cancel **Cancel** button to cancel it.
3	If you want to edit an existing Per Diem, click on the **Edit** button. To delete the existing Per Diem, click on the **Delete** button.

Once the **Per Diem Setup** is done, when employees access their **Per Diem Claim Form**, the allowance amount that they can claim will be automatically calculated based on the **Per Diem Setup** table.

Policy Setup

You can write-up your organisation's claim policies and publish them at the Policy Setup web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Policy Setup** to access the web page.

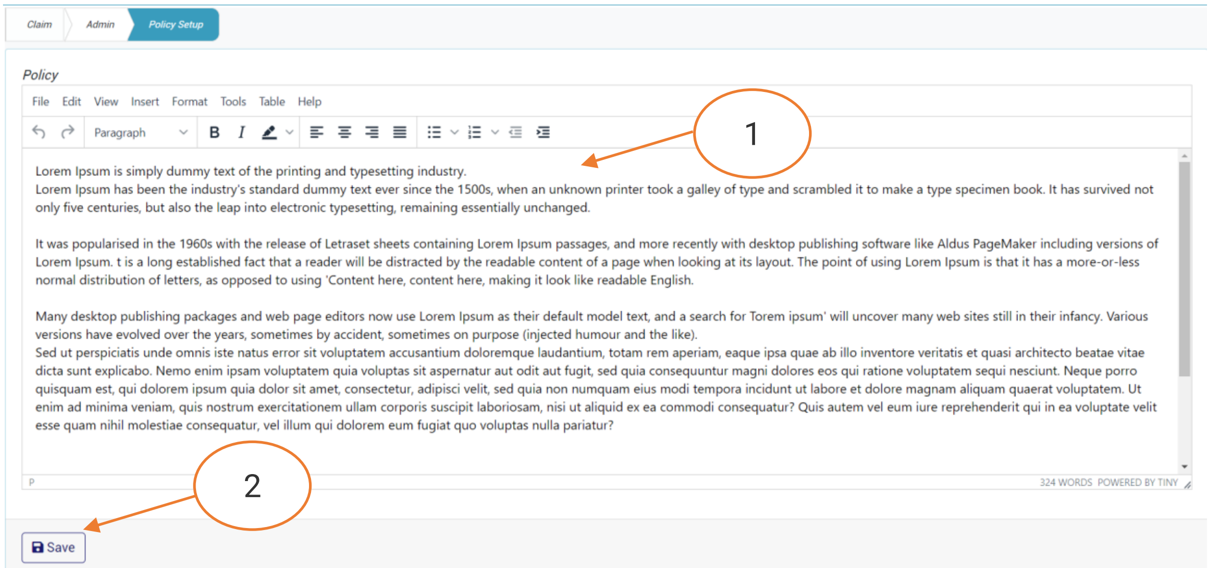


Figure 16 TIMES PRO Policy Setup web page sample

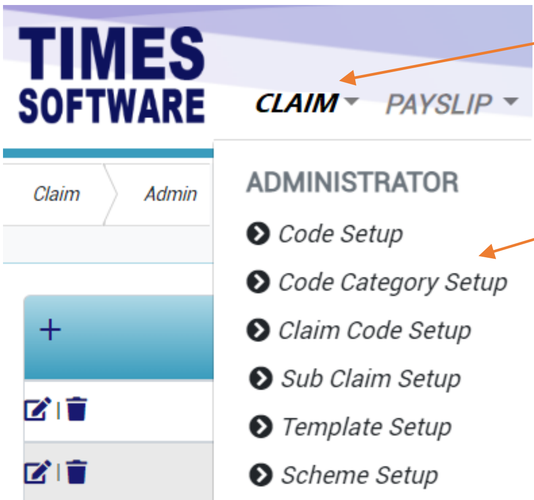
1	Enter the claim policy details in the word editor.
2	Click Save **Save** button to save the claim policy and publish it for all users to see in their **Policy** web page.

Approval Setup

The **Approval Setup** function allows the Administrator to setup the approval flow for each employee by indicating each employee's reporting supervisors as the employee's TIMES PRO Claim approvers.

These approvers will be responsible in reviewing, approving and rejecting their reporting employees' claim applications.

Additionally, you can designate the roles of Administrator and Entry Officer to specific employees in this function. Do note that Administrators have access to both HR and Administrator menus.



Click on the **CLAIM** menu to access the menu list.

Click on **Approval Setup** to access the web page.

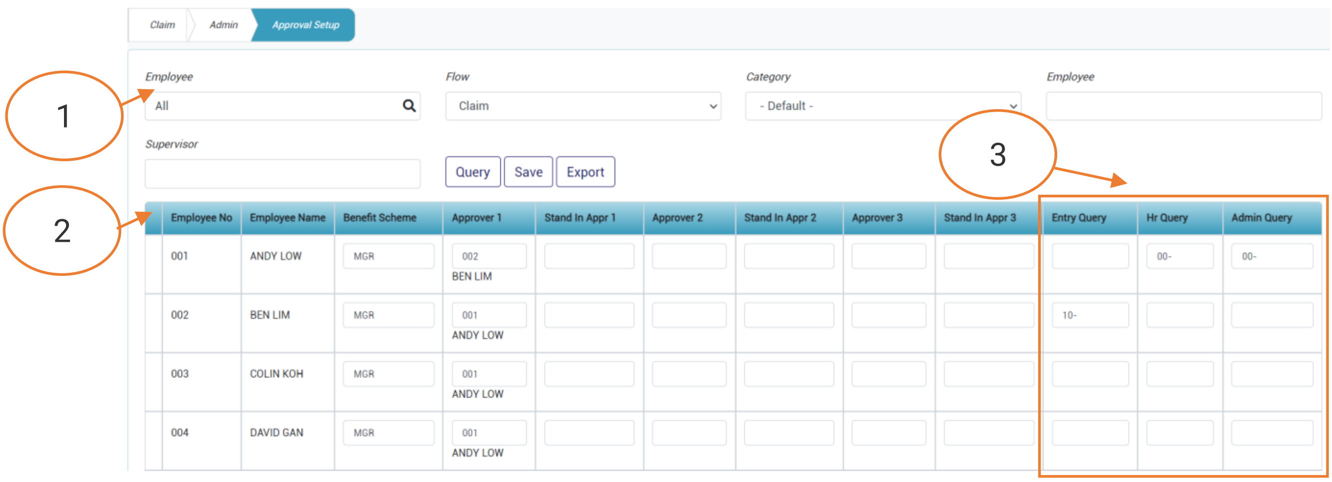


Figure 17 TIMES PRO Approval Setup web page sample

<table>
<tr><td>1</td><td>Choose “Department” and a list of employees who are assigned to the selected department(s) will be shown on the web page.
If you want to make multiple selections, you can click on the ☐ checkboxes to select your targeted employees.

Please take note and ensure that the “Flow” is Claim.

Choose either – Default – or a specific Claim Code from “Category”.
Approval flow for – Default – claim code applies to all Claim Templates that do not have any approval flow defined specifically for them.

Alternatively, you can use the advanced “Employee” or “Supervisor” search to retrieve a list of employees based on the text that you enter in it.
This search will find the nearest matching employee number or employee name.
After you had entered the text in it, click Query to see the results.

Click Save Save button to save the approval flow created.
Click Export Export to download the system’s approval flow into an excel document.</td></tr>
<tr><td>2</td><td>Enter or change the “Benefit Scheme” and click Save Save button to save the changes.

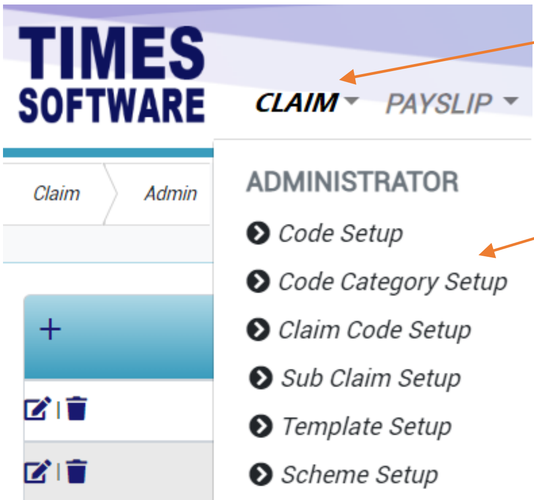
To setup the approval flow, you need to key in the approver’s employee number for each employee under the approver columns (they are called “Approver 1”, “Approver 2” and “Approver 3”).

You can also designate the stand-in approvers for each of the main approvers (they are called “Stand In Appr 1”, “Stand In Appr 2” and “Stand In Appr 3”).

Click Save Save button to save the approval flow created.</td></tr>
<tr><td>3</td><td>Assign the Employees’ Roles using Query.
<table>
<tr><th>Field Name</th><th>Purpose</th></tr>
<tr><td>Entry Query</td><td>Before you can designate an employee as an Entry Officer, you must have a Query created from TIMES PRO Payroll application. The Query will determine the list of employees that the Entry Officer can have access to in order to manage their duty rosters and time sheets.</td></tr>
</table></td></tr>
</table>

		To designate an employee as Entry Officer, enter the Query Name (case sensitive) at the "Entry Query". Then click the Save button to save the entry. To remove the Entry Officers' role from an employee, simply delete the Query Name at the "Entry Query" and click the Save button.
	Hr Query	Before you can designate an employee as an **HR**, you must have a **Query** created from TIMES PRO Payroll application. The Query will determine the list of employees that this HR can have access to in order to manage their information. To designate an employee as HR, enter the Query Name (case sensitive) at the "Hr Query". Then click the Save button to save the entry. To remove the HR role from an employee, simply delete the Query Name at the "Hr Query" and click the Save button.
	Admin Query	Before you can designate an employee as **Administrator**, you must have a **Query** created from TIMES PRO Payroll application. The Query will determine the list of employees that this Administrator can have access to in order to manage their information. To designate an employee as Administrator, enter the Query Name (case sensitive) at the "Admin Query". Then click the Save button to save the entry. To remove the Administrator role from an employee, simply delete the Query Name at the "Admin Query" and click the Save button.

Mail Log



Click on the **CLAIM** menu to access the menu list.

Click on **Mail Log** to access the web page.

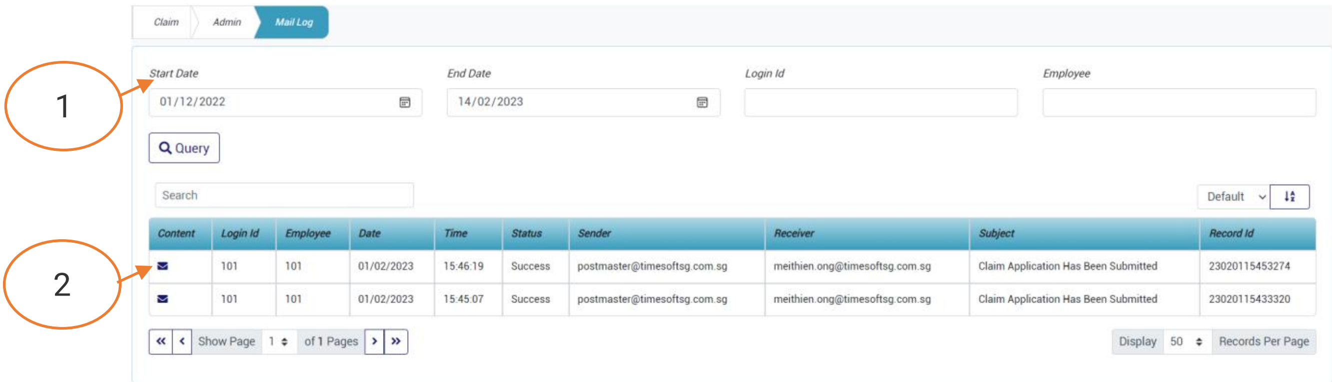
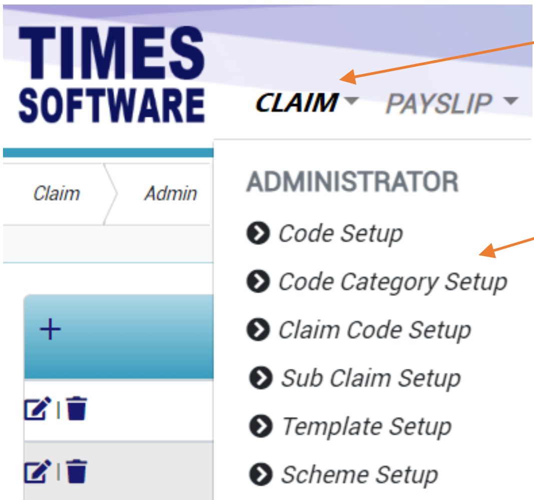


Figure 18 TIMES PRO Mail Log web page sample

1	You can use the **Data Filters** to filter the log information. Click the **Query** button to retrieve the information based on your filter criteria.
2	Click on the **Mail** button to view the contents of the email.

Audit Log

You can track transactions made by administrators at the **Audit Log** web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Audit Log** to access the web page.

1

2

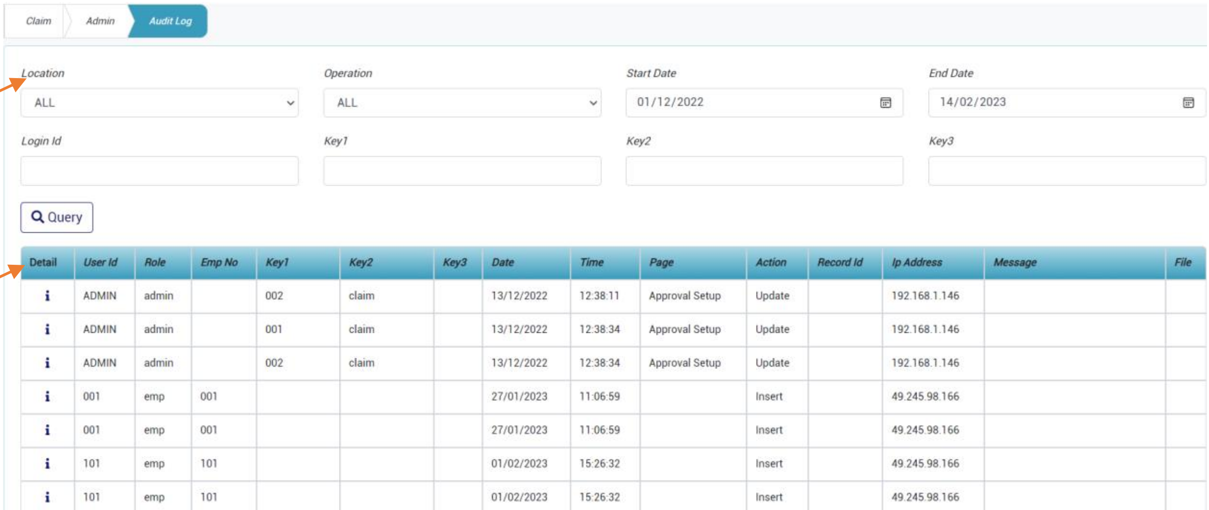
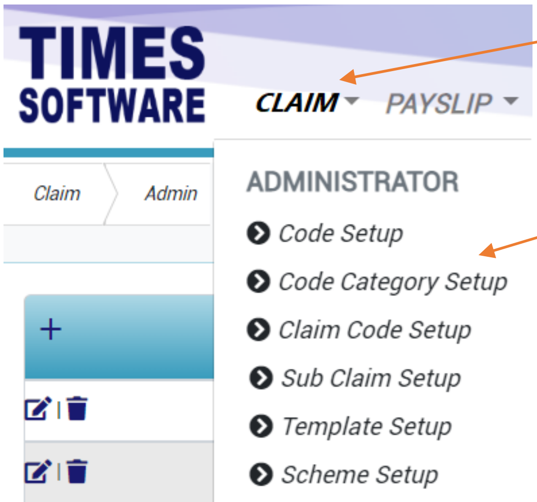


Figure 19 TIMES PRO Audit Log web page sample

1	Enter your search criteria and click Query **Query** button to retrieve the audit log.
2	Click i **Detail** button to see the details of the record.

Action Log

You can track transactions made by users at the **Action Log** web page.



Click on the **CLAIM** menu to access the menu list.

Click on **Action Log** to access the web page.

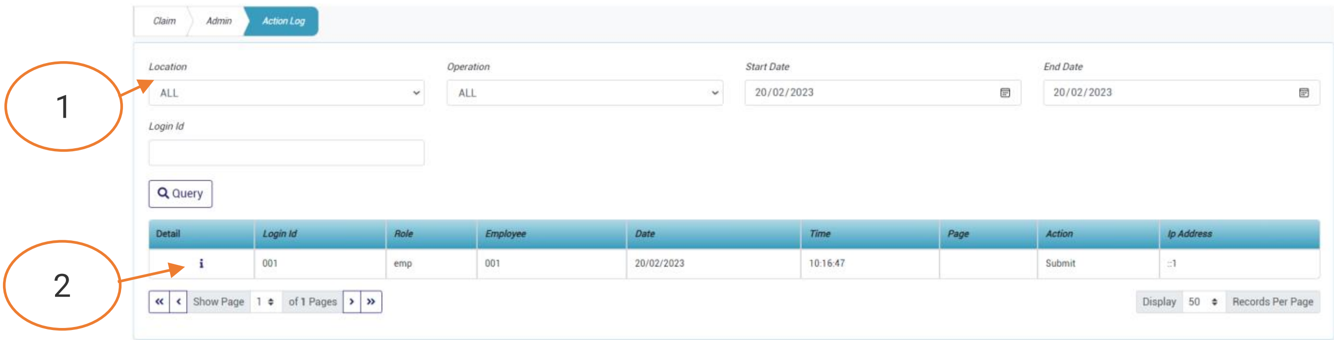


Figure 20 TIMES PRO Action Log web page sample

1	Enter your search criteria and click Query button to retrieve the action log.
2	Click **Detail** button to see the details of the record.

End of Document