Times Form

Standard Setup and Maintenance User Guide for Administrator

Times Software Pte Ltd **14th September, 2020** **Release 1.0**

Disclaimer

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Chapter 1. Introduction

TIMES Form is a web-based forms management system where employees can submit e-form online with scanned document. The system made use of internet technologies to support web-based paperless form application/submission of your employees. Administrators can easily assess employee's current form status, details, and retrieve data. All departmental heads could easily assess their own employees' forms.

Some chapters in the first section contain technically complex information that may require the reader to have information technology knowledge in order to understand them.

Product Support and Inquiries

For technical assistance or inquiry on our products, please contact us via our hotline (65) **6295 1998**.

Alternatively, you can send us an email to the following email addresses:

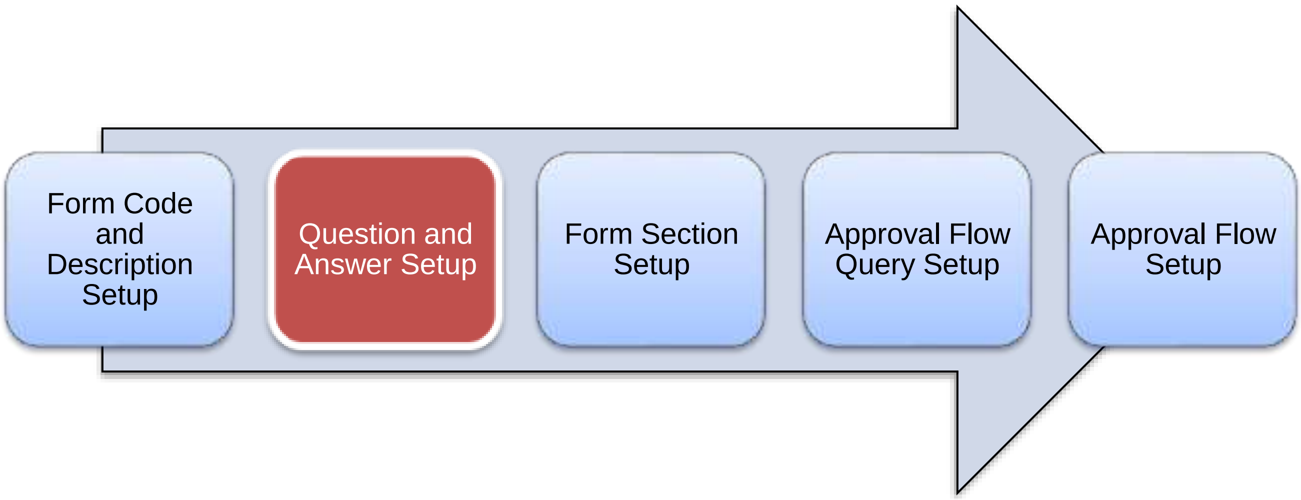
For support and assistance, please email to *supports@timesoftsg.com.sg*.

For product inquiry, please email to *sales@timesoftsg.com.sg*.

Chapter 2. Standard Setup Workflow

To setup a new TIMES Form System, the Administrator begins by creating **Forms** that employees can fill in.

To start off, the Administrator must create the forms and define the question rules for them.



First, master codes for drop-down lists/radio button/multiple choice in the system will be setup in **Question Answer Setup**.

Next, the Administrator creates the questions at **Question Setup** and tag to the pre-defined answer creates in **Question Answer Setup**.

The Administrator then creates the Form at **Form Setup** by assigning the **Question Profile** which assigned during the **Question Answer Setup**.

To set the Question as Mandatory to be answered by employee, this can be set at **Question Answer Setup**.

Once the forms have been created, the Administrator proceeds to setup the employee query at Form Setup and then proceed to setup the approval flow at **Approval Setup** page.

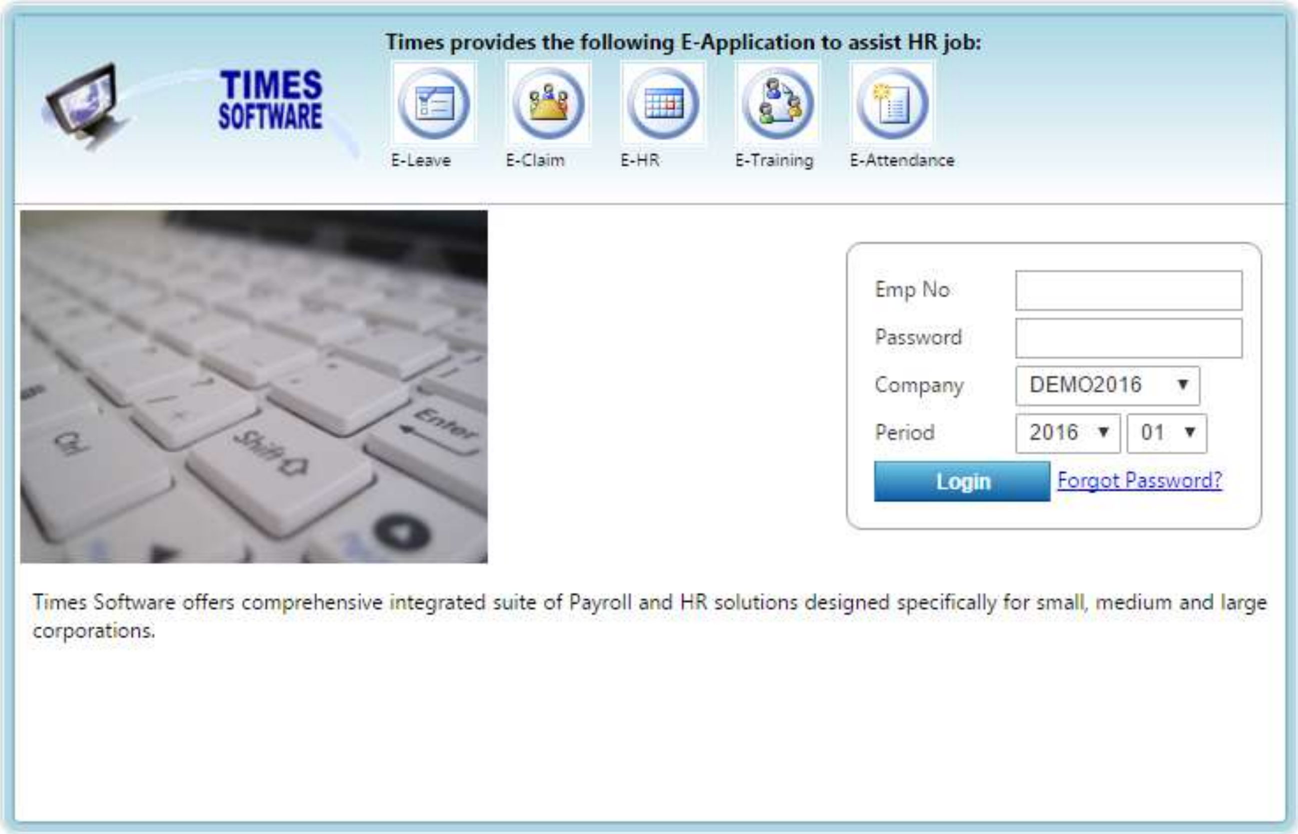
In the **Approval Setup** the Administrator specifies approvers in an approval flow that will approve or reject employees' submitted forms.

The Administrator can then publish the Form by assigning the **Start Date** and **End Date** of the form at **Form Setup**.

Chapter 3. First time logging into the TIMES Form System

Open your internet browser and enter the URL address to access the TIMES Solution portal login web page, example: *http://www.myportal.com/esolution/Signin.aspx*

An example of the login page is shown below.



Click on the “Company” drop-down list to see a list of available companies and choose the one that you want to access to.

Key in your login id at “Emp No”.

Key in your password at “Password”.

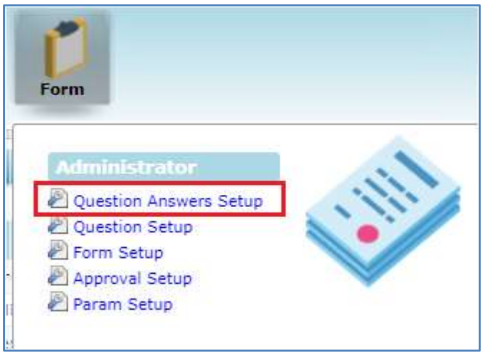
Click the 

button to login into the system.

To effectively use this guide, ensure that you are given the role of Administrator for the company that you are logging into. If the role is not setup yet, use login id *Admin* at “Emp No” to login as the Administrator.

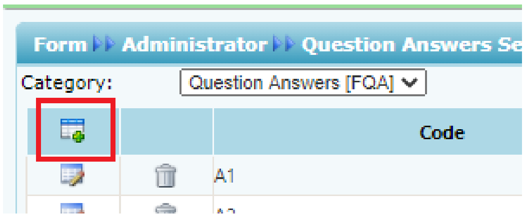
Chapter 4. Question Answers Setup

You can create and manage master codes of all the questions' answer at **Question Answers Setup**. Map Code defined here are used to assign the answer lists in the **Question Setup**.



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

To create a new map code click the icon.



Enter the "Code" (maximum 8 characters), "Description", Map Code, Sort No and click icon to create the new code or icon to cancel the action.

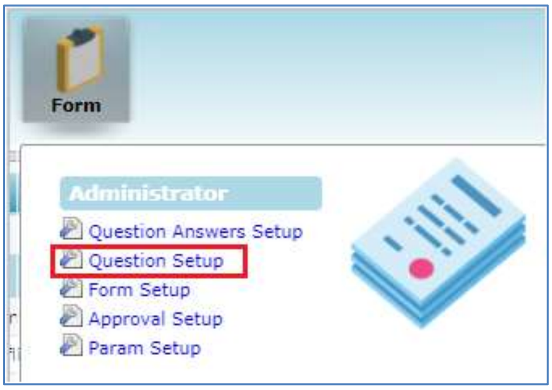
If you see the pop-up message *"Same record exists."* when trying to create a new code, this indicates that the "Code" that you are trying to create already exists.

To make changes to an existing code, choose a "Code" and click icon. Enter in the new description and click button to update the changes or icon to cancel the changes.

To delete an existing code, choose a "Code" and click icon. Deleted codes are unrecoverable.

Chapter 5. Question Setup

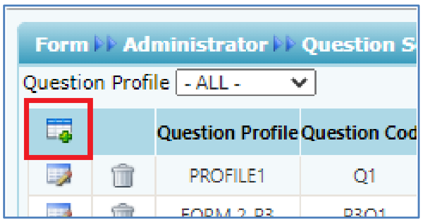
In the **Question Setup** web page, you can create and manage the question with pre-set answers in the system. In the Question Setup, you can create the question and answer in different way such as using drop-down, radio list, date picker, textbox, textarea, label, numeric and checkbox list. You can set question as mandatory to be answered in **Question Setup**.

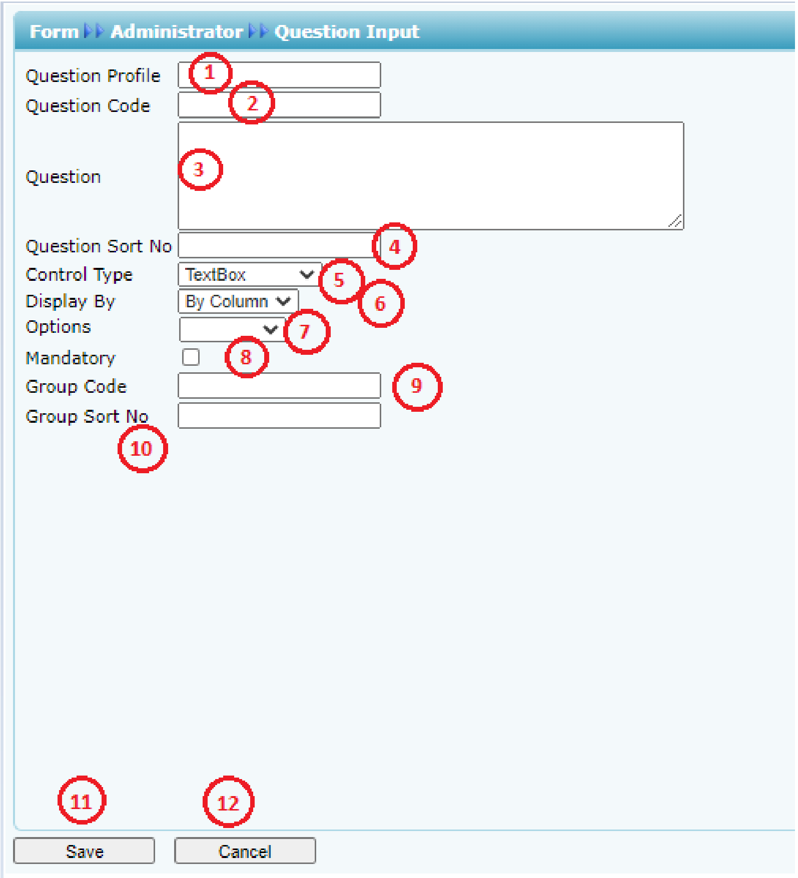


Click on the **Question Setup** option in the Administrator menu to access the Question Setup web page.

Click the **Question Profile** to filter the question based on profile group on screen.

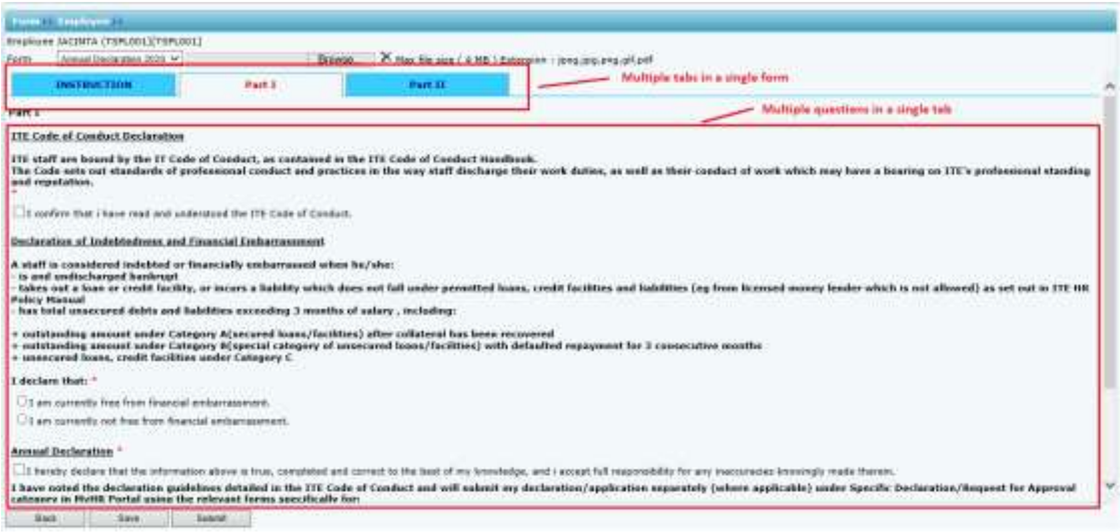
To create a new question, click the icon.





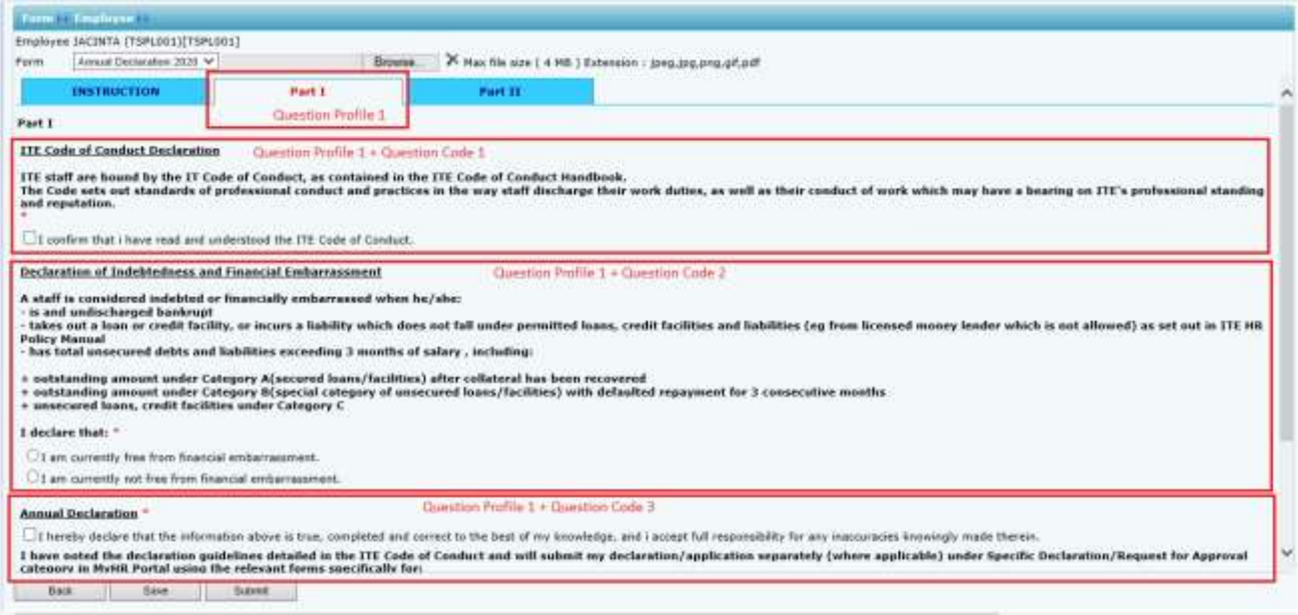
Question Profile

Question Profile is used to define the grouping of the question into a section/tab.



Question Code

Question Code is a code used to assign to each question.



Question Description

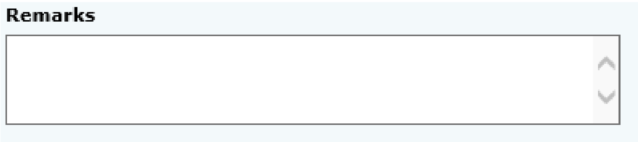
Description of the question or label to be shown on the form.

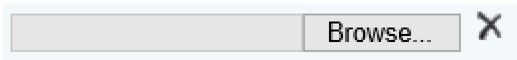
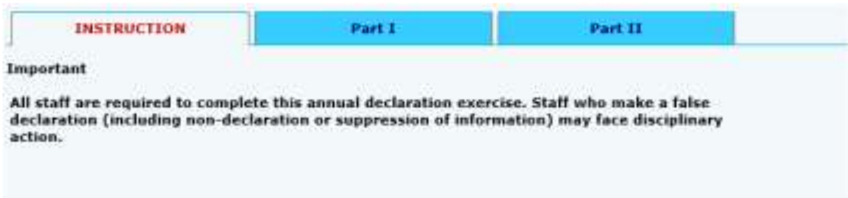
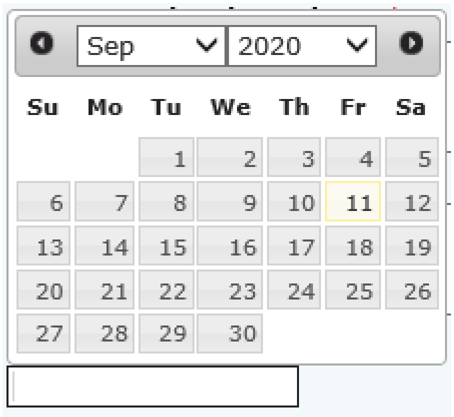
Question Sort No

Sequence of the question sort order display in the form

Control Type

Type of control used to design the question and answer

Control Type	Description
TextBox	A small textbox. Allows to input alpha-numeric. 
TextArea	A large textbox. Allows to input alpha-numeric. 
Numeric	A textbox where allows to input numeric only. 

RadioList	A radio button answer. 
CheckBoxList	A checkbox list answer. Allows to choose multiple selection. 
DropDownList	A dropdown list answer. 
File	Attachment field. 
Label	Label use for display purpose only. 
Date Picker	Input date only. 

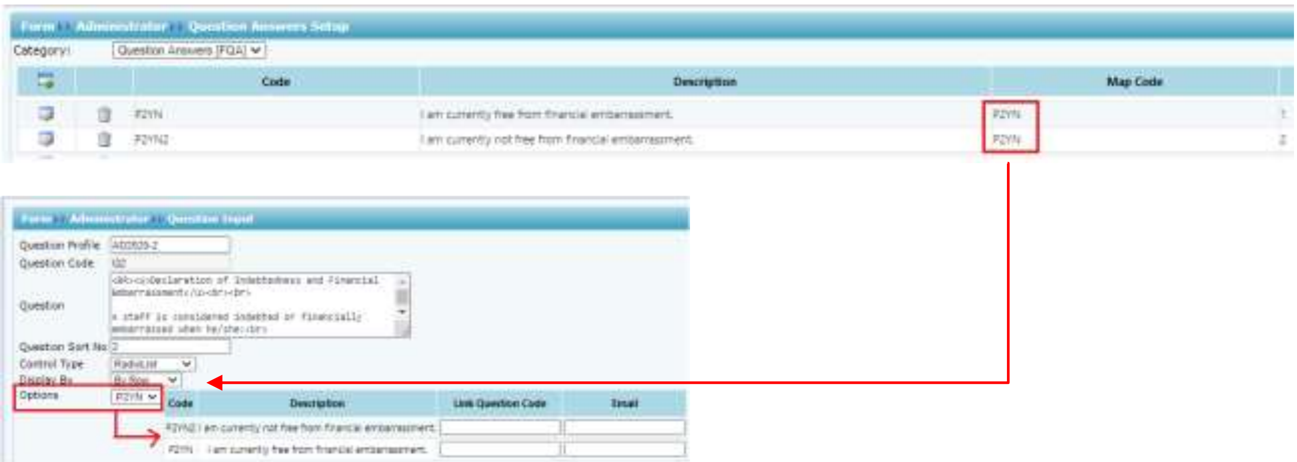
Display By

Display of the answer layout.

Control Type	Description
By Column	Display answer on the right side of the question 
By Row	Display answer below the question 

Options

Mapping of Question Answer Setup map code



Mandatory

Tick this option to set mandatory to be answered or untick to set non-mandatory to be answered.

Group Code

Grouping of the question within a same Question Profile

Group Sort No

Sequence of the Group Code within the same Question Profile

Save

Click Save button to save the changes or new Question.

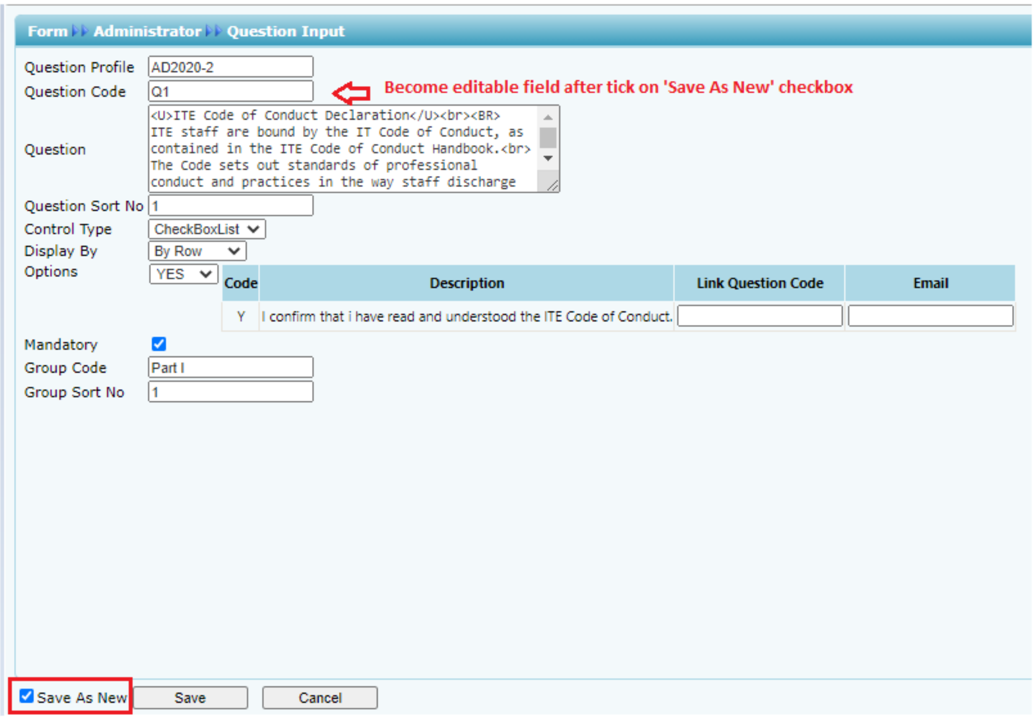
Cancel

Click Cancel to revert the changes or cancel the creating of new question.

5.1 Duplicate new question setup

Go to Question Setup option to access Question Setup web page.

Go to existing question, click on  icon, tick on the ☑ Save As New checkbox at the below of the screen, enter the new **Question Code** and edit the question details.

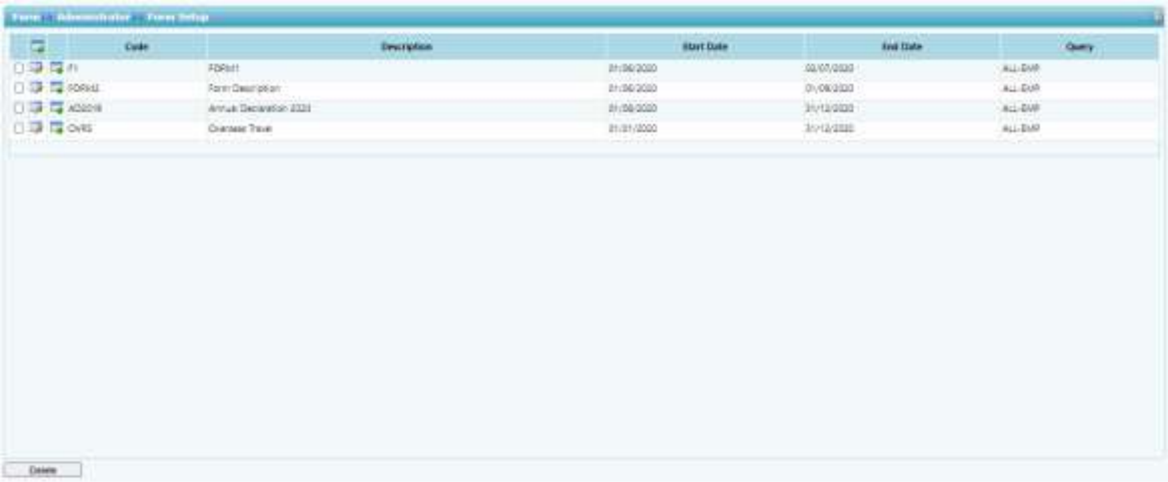


Click the Save button to save the new question setup.

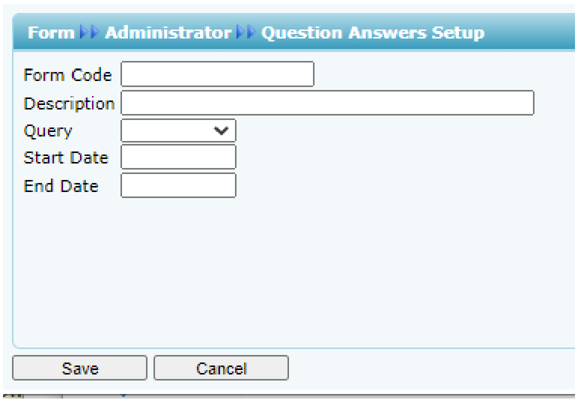
Chapter 6. Form Setup

Once the Question Setup is done, you can setup a new Form in the system.

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



Click on the  button to create a new form.



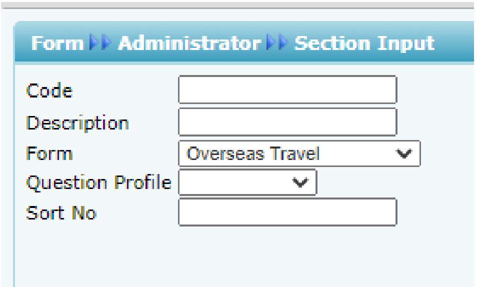
Enter the “Form Code”, “Description” for the form name and choose the Query.

Before you can assign the Query, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees who can see and access to this new form in order to submit the online e-form submission.

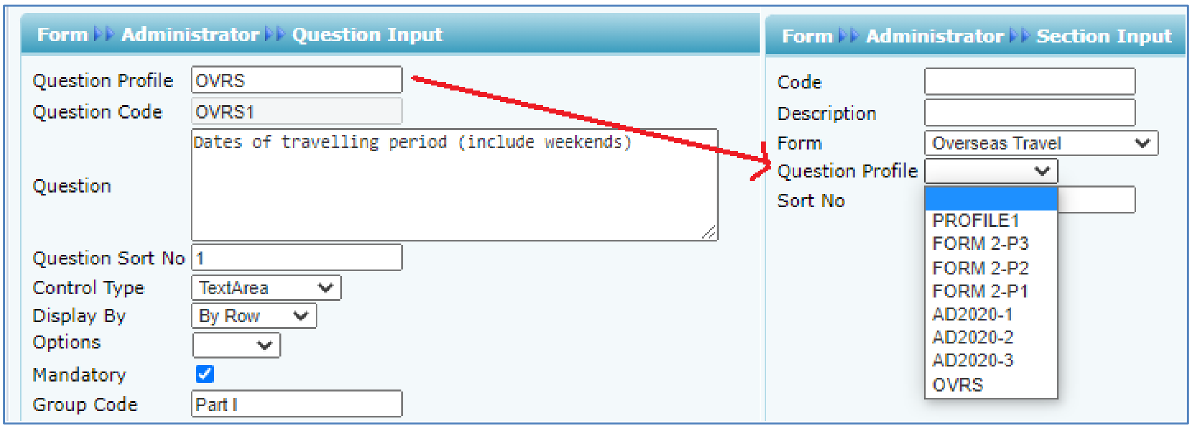
Enter the **Start Date** and **End Date** of the form to publish. Once the End Date reached, employees will not be able to choose the form from E-Form system.

Then click the Save button to save the creation.

After the new form header is created, click the button to create the form details (tabs) by tagging the Question Profile that you have created earlier on.



Enter the 'Code', 'Description' of the new tab description, 'Form' assignment, 'Question Profile' and Sort No.



The 'Question Profile' dropdown list is linked from the Question Profile that you have created in Question Setup page.

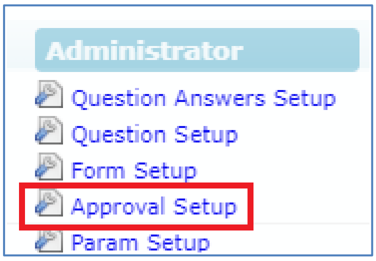
Then click the Save button to save the creation.

Chapter 7. Approval Setup

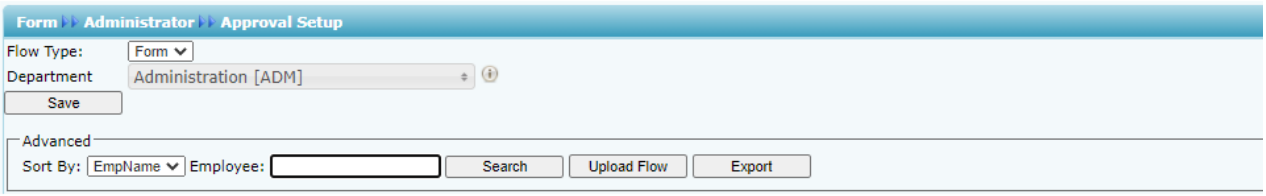
The **Approval Setup** function allows you as the Administrator to setup the approval flow for each employee by indicating each employee's reporting supervisors as the employee's TIMES Form approvers.

These approvers will be responsible in reviewing, approving and rejecting their reporting employees' online form submission.

Additionally, you can designate the roles of HR and Entry Officer to specific employees in this function.



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



Choose "Department" and a list of employees who are assigned to the selected department(s) will be shown on the web page. If you had made multiple selections, you can click button to see your selections.

Alternatively you can use the "Advanced Employee" 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 name. After you had entered the text in it, click Search to see the results.

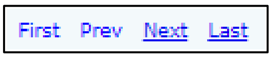
7.1 Navigating the Approval Setup

If your organization has a large number of employees, you will most likely have a large list of employees. To help you sort out and see the different web pages of records, you can use the following functions (they are located at the bottom of the web page):

Click on the “Display Records Per Page” dropdown list to choose the number of records that can be shown on the web page.

A maximum of 500 records can be shown on a single web page.

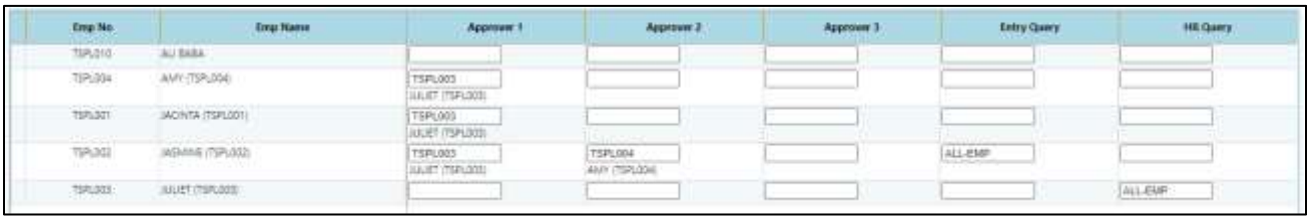
Click on the “Show Page” dropdown list to choose a specific web page of records.



Click on the “First”, “Prev”, “Next” or “Last” hyperlinks to navigate to each of the web pages if there are more than a single web page.

7.2 Setting up the Claim Approval Flow

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”).



Emp No.	Emp Name	Approver 1	Approver 2	Approver 3	Entry Query	HR Query
TSPL010	ALI BABA					
TSPL004	AMY (TSPL004)	TSPL003 JULIET (TSPL003)				
TSPL001	JACINTA (TSPL001)	TSPL003 JULIET (TSPL003)				
TSPL002	JASMINE (TSPL002)	TSPL003 JULIET (TSPL003)	TSPL004 AMY (TSPL004)		ALL-EMP	
TSPL003	JULIET (TSPL003)					ALL-EMP

The system provides up to three levels of approval for each employee and these approvers must be entered into the approver columns in a proper sequence. It’s not mandatory to setup all three levels of approval.

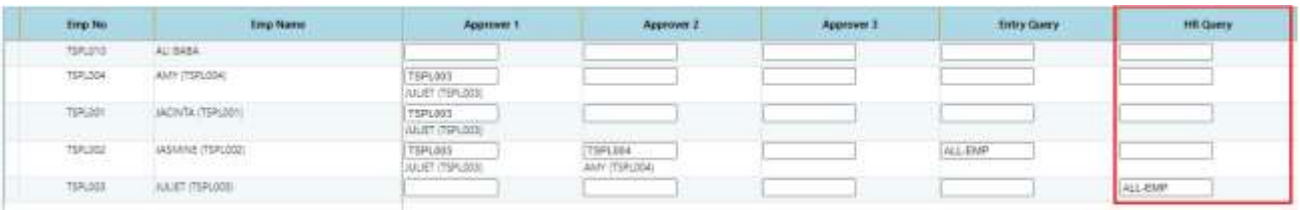
For example, if an employee reports to a supervisor and the supervisor reports to the head of department, then the supervisor’s employee number is setup at “Approver 1” and the head of department’s employee number is setup at “Approver 2” for the employee.

Once you have completed the entry, click the Save button. If you had entered the correct employee’s number for the approvers, their names will appear on the web page. If not, just re-key in the correct employee number under the approver columns and click on the Save button.

7.3 Assigning the HR Role

The role of HR grants the employee access to the **HR** menu.

Before you can designate an employee as HR, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees that this HR can have access to in order to manage their information.



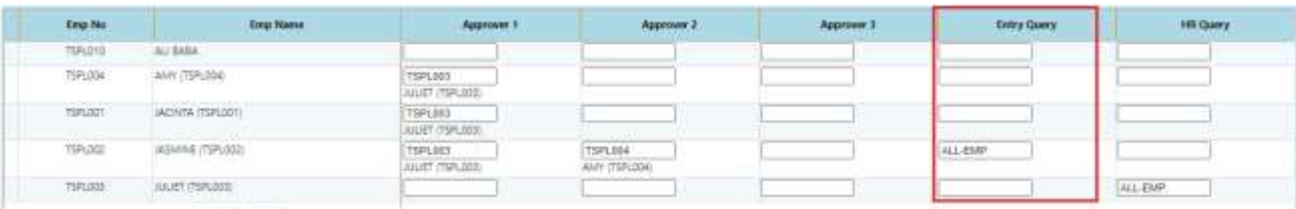
To designate an employee as HR, enter the Query Name (<u>case sensitive</u>) at the “Hr Query”. Then click the Save button to save the entry.

To remove the HR role from an employee, simply delete the Query Name at the “Hr Query” and click the Save button.

7.4 Assigning the Entry Officer Role

The role of Entry Officer grants the employee the ability to submit on behalf his or her colleagues’ claim applications and will have access to the **Entry Officer** menu.

Before you can designate an employee as an Entry Officer, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees that the Entry Officer can have access to in order to manage their online form.

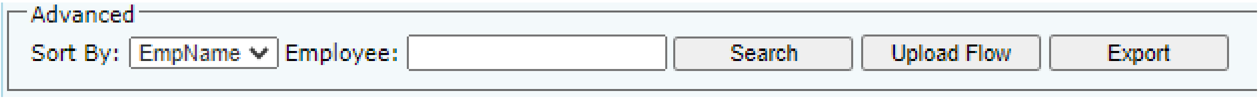


To designate an employee as an Entry Officer, enter the Query Name (<u>case sensitive</u>) at the “Entry Query”. Then click the Save button to save the entry.

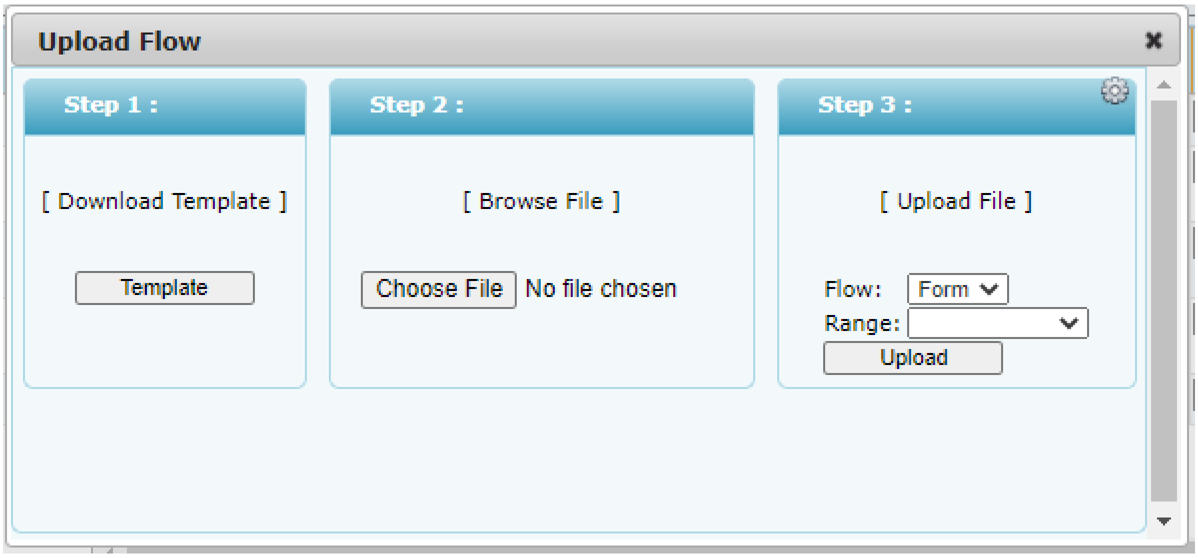
To remove the Entry Officer role from an employee, simply delete the Query Name at the “Entry Query” and click the Save button.

7.5 Uploading Approval Flow into the system from Excel

If you like to prepare the approval flows in an excel document, you can use the system's excel template document to enter the approval flow information and upload them into the system by using the Upload Flow feature.



Click on the Upload Flow button to access the **Upload Flow** pop-up window.



First step is to download the system's excel template document. Click on the Template button at "Download Template" at Step 1 to download the document.

Next, open the excel template document and enter the approval flows into the document. Make sure to save the document.

Once done, proceed to Step 2 and click on Choose File to choose the completed excel document.

Finally, at Step 3, ensure the "Flow" is *Form* and click the Upload button to upload the approval flow information from the selected excel document into the system.

7.6 Export the system's Approval Flow into an Excel document

You can export the system's approval flow into an excel document. To do so, first retrieve the list of approval flows and then click on the Export button.