TIMES TimeSheet

OT Requisition Setup Guide for Administrators

Times Software Pte Ltd

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Disclaimer

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Chapter 1. Introduction

TIMES TimeSheet system provides a feature called **OT Requisition** for users to request for overtime work subject to approval by supervisors.

This guide for administrators explains the method to setup and use this feature.

Product Support and Inquiries

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

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

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

Assumptions

This guide is written with the assumption that the reader has knowledge of the standard setup of TIMES TimeSheet system and this guide will not cover in detail the functions of the standard setup of the system (such as Shift Setup, Shift Schedule, etc.).

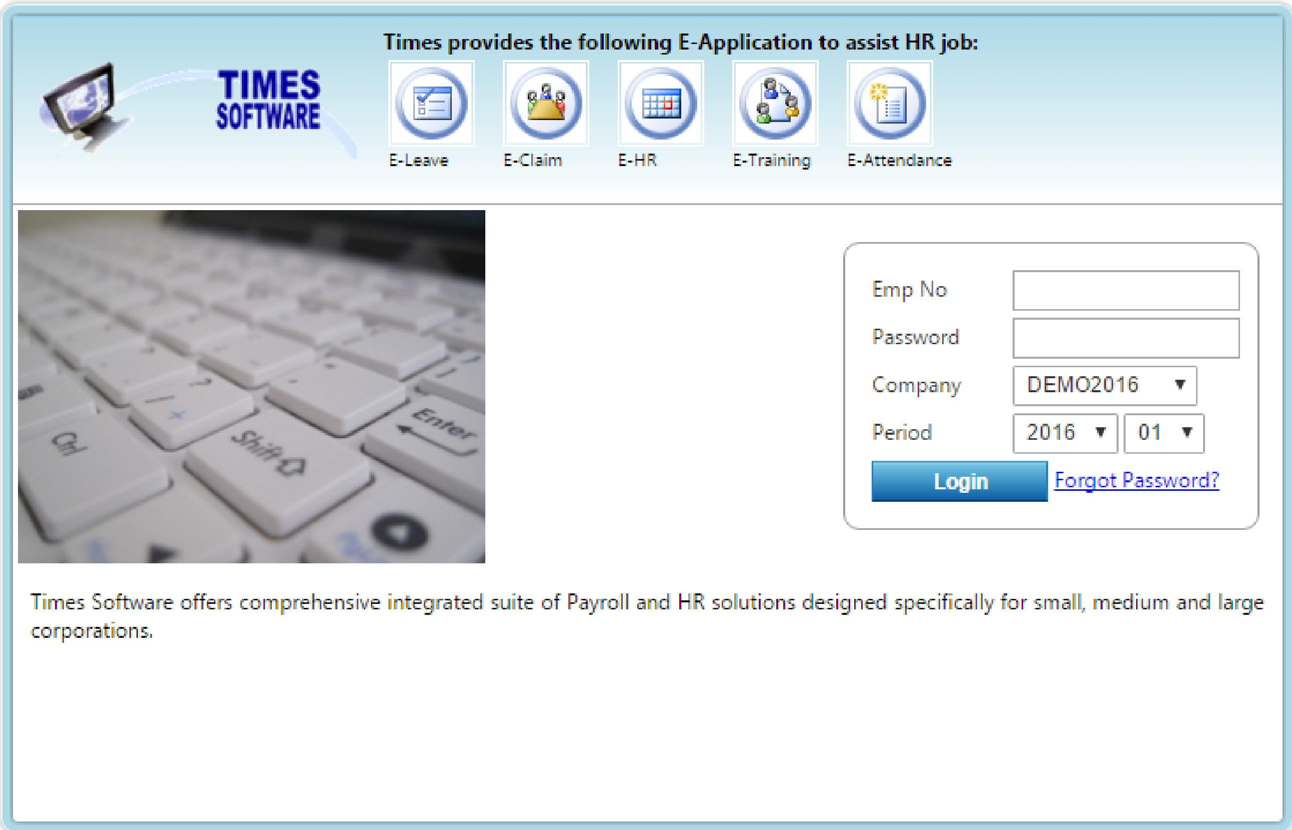
Instead this guide provides relevant and sufficient information in setting up the OT Requisition and will not cover topics beyond this scope.

Should the reader require more information on the standard setup of TIMES TimeSheet system, please refer to the *TIMES TimeSheet Standard Setup and Maintenance User Guide for Administrators*.

Chapter 2. Logging into the TIMES TimeSheet 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.



1. Click on the "Company" drop-down list to see a list of available companies and choose the one that you want to access to.
2. Key in your login id at "Emp No".
3. Key in your password at "Password".
4. 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 3. 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 overtime requisition approvers.

These approvers will be responsible in reviewing, approving and rejecting their reporting employees' **OT Requisition**.

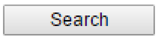
Additionally, you can designate the roles of Administrator and Entry Officer (also known as Scheduling Specialist) to specific employees in this function. Do note that Administrators have access to both HR and Administrator menus.

It is important to note that the approval setup for OT Requisition is maintained separately from the TIMES TimeSheet approval setup. There are two vital reasons for this.

The first reason is that OT Requisition approval flow adopts the "Strict Hierarchy" flow whereas TimeSheet approval flow adopts the "Flat Structure" flow. "Strict Hierarchy" flow means that the overtime requisitions raised will need to be approved by the first approver and then routed to the second approver, in which the second approver will need to approve it before routing it to the third approver. "Flat Structure" requires just one approver from the three approvers to final approve a record.

The second reason is that some organisations have different approval flows (different supervisors/approvers) for approving and rejecting time sheets and overtime requisitions.

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

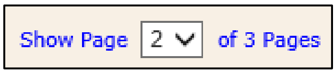
2. At the Approval Setup web page, ensure the “Flow Type” is *OT Requisition*.
3. Choose a “Department” and a list of employees who are assigned to the selected department will be shown on the web page.
4. Alternatively you can use the “Advanced Employee” search to retrieve a list of employees based 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  to see the results.

3.1 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.

3.2 Setting up the OT Requisition 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	Card No	Approver 1	Approver 2	Approver 3
001	DAVID GAN	001	001 DAVID GAN		
002	BENJAMIN WONG	002	001 DAVID GAN		
003	CINDY LIM	003	001 DAVID GAN		

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.

Ensure the "Card No" for each employee is correctly reflected in this page. The "Card No" (also known as the badge number) is used by the system to identify the employee from the time clock devices' data. If the employee's "Card No" is incorrect or missing, enter the correct number and click Save to save the changes.

3.3 Assigning the Administrator Role

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

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

Emp No	Emp Name	Card No	Approver 1	Approver 2	Approver 3	Hr Query	Entry Query
105	EMILY WONG	105	001 DAVID GAN			ALL	

To designate an employee as Administrator, enter the Query Name (<u>case sensitive</u>) at the "Hr 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 "Hr Query" and click the Save button.

3.4 Assigning the Entry Officer Role

The role of Entry Officer grants the employee the ability to enter and submit employees' overtime requisitions for approval, 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 duty rosters and time sheets.

Emp No	Emp Name	Card No	Approver 1	Approver 2	Approver 3	Hr Query	Entry Query
105	EMILY WONG	105	001 DAVID GAN				SALES

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.

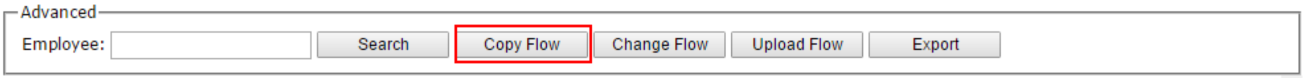
To remove the Entry Officer role from an employee, simply delete the Query Name at the "Entry Query" and click the Save button.

It is not necessary for the employee to have entry officer role for both *TimeSheet* and *OT Requisition*. In this way, one employee can be Entry Officer for the **Time Sheet** and another employee can hold the Entry Officer role for **OT Requisition**.

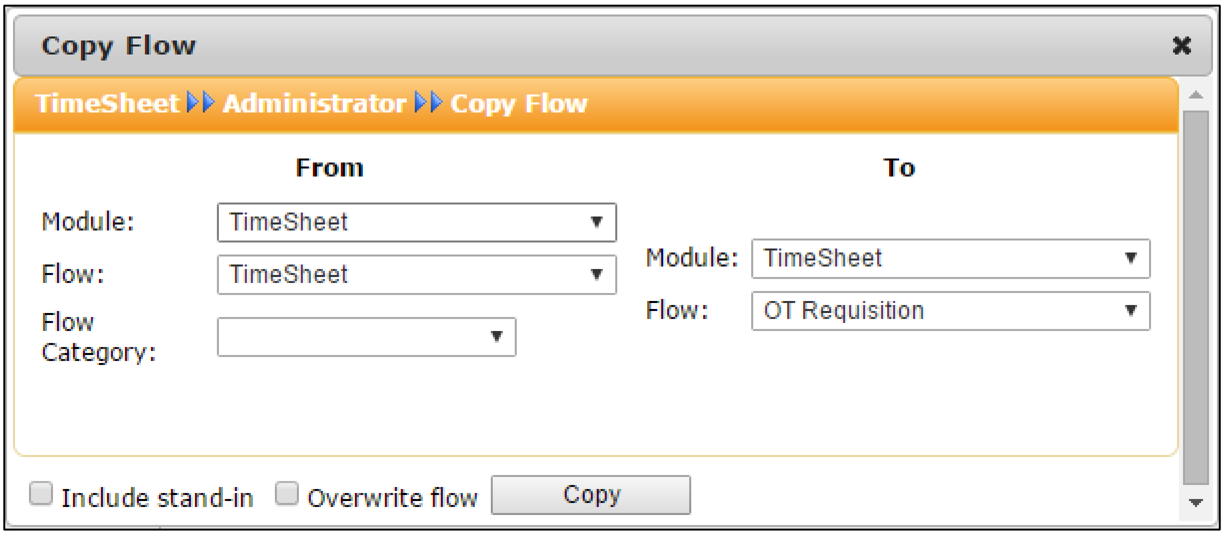
3.5 Automatic Setup of the Approval Flow

You can quickly populate the list of approvers for each employee by using the Copy Flow. This function transfers the list of approvers from one source location (such as from another system or module) over to this system.

Typically you can use this to transfer the approval flow of TIMES TimeSheet over to the OT Requisition approval setup.



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



Choose the “Module” and “Flow” dropdown lists under the column **From** to indicate the source location where the system will copy the list of approvers from and choose the “Module” *TimeSheet* and “Flow” *OT Requisition* from the dropdown lists under the column **To** to copy the approval flow over to OT Requisition.

If applicable the “Flow Category” will be available for selection. Some TIMES Solution systems can have their approval flow setup based on a specific category and you can choose to select this approval flow to copy over to TIMES TimeSheet system.

On default the system will transfer the list of approvers for employees who do not have their approval flow setup information at the Approval Setup. If you wish to overwrite the employees’ existing approval flow setup information click on the Overwrite flow checkbox to tick it.

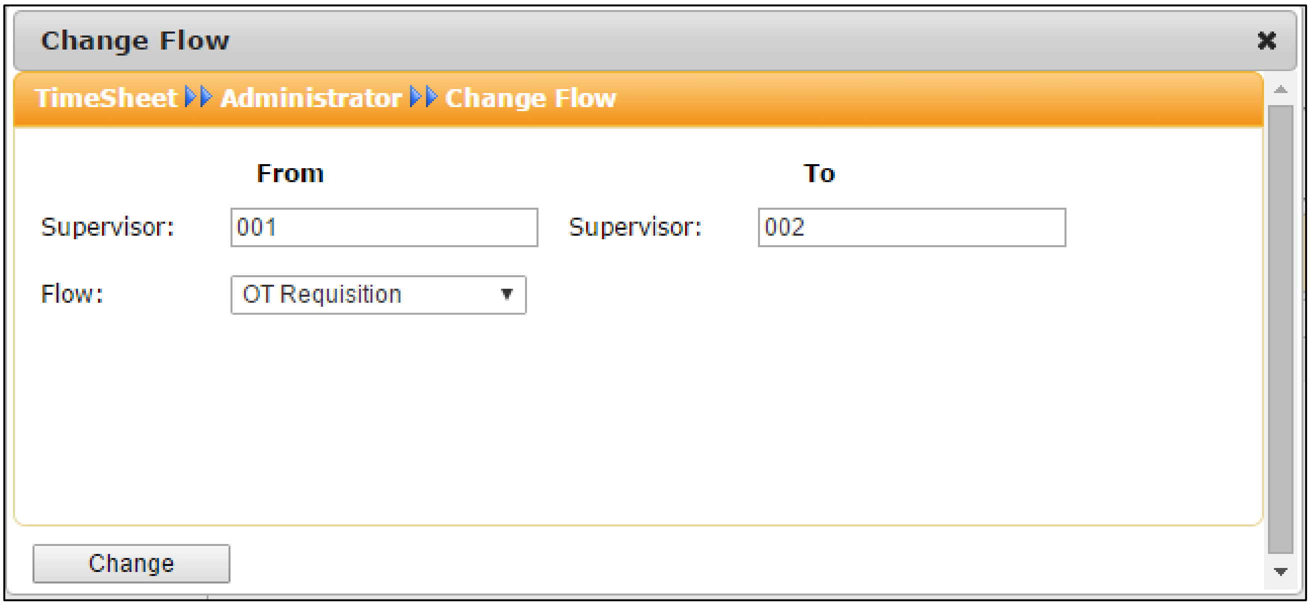
Click Copy to initiate the process.

You can still manually change the approvers for each employee after Copy Flow had been executed.

3.6 Easy Change of Approver

In the event you need to change an approver for many employees, you can use the Change Flow feature to easily perform that action without the need to manually change the approver for each employee.

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



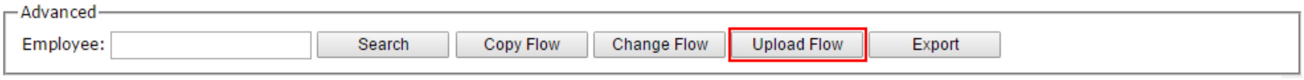
Enter the employee number of the approver that you want to change at “Supervisor” under the column **From** and the replacement approver at “Supervisor” under the column **To**.

Ensure the “Flow” is *OT Requisition* and click Change to proceed with the changes.

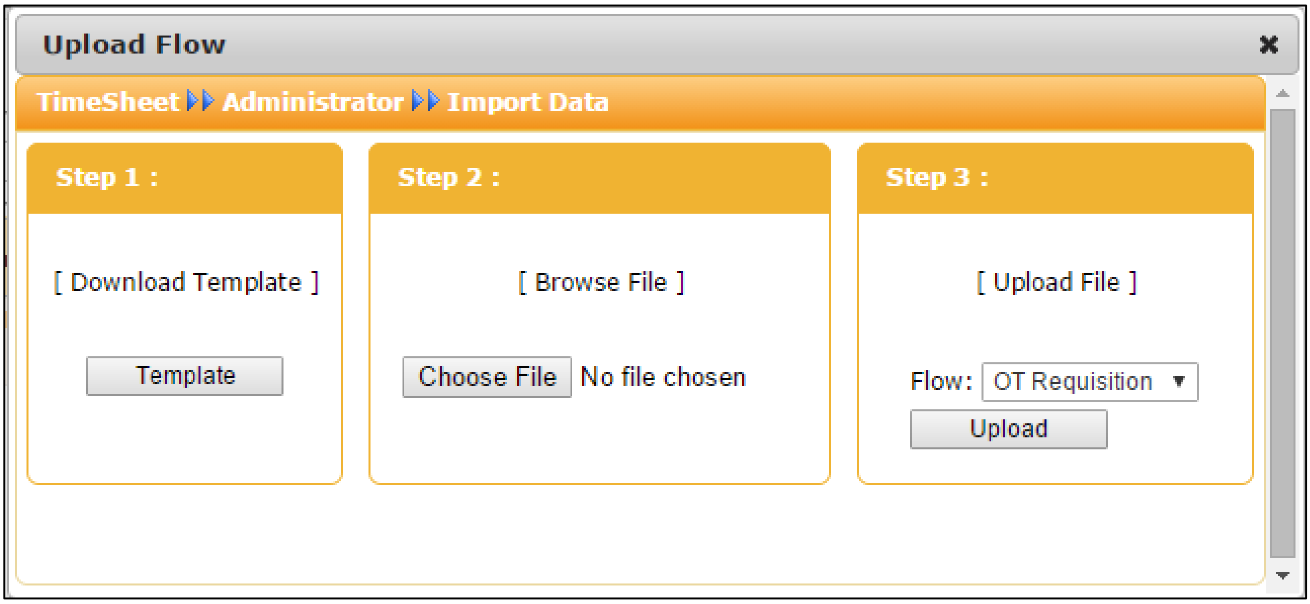
In this example, all employees who have the approver *001* will be replaced with approver *002*.

3.7 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.

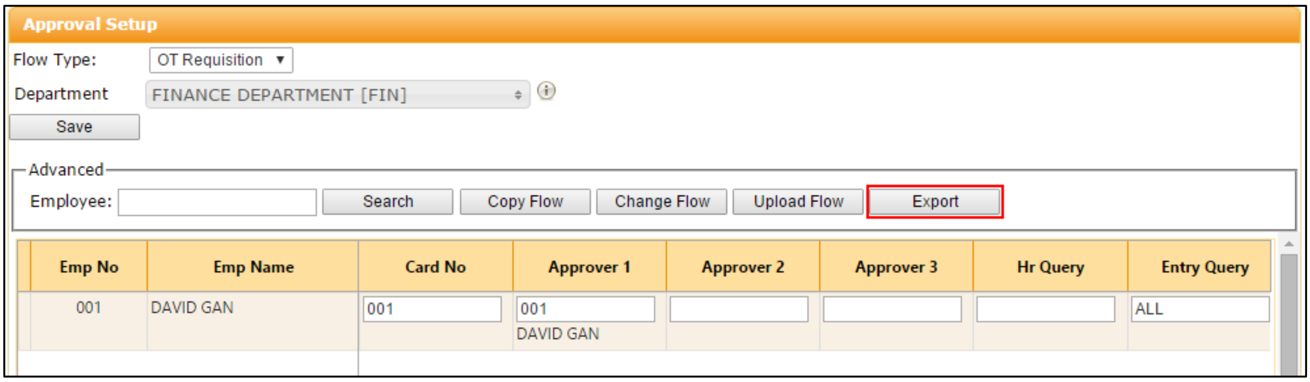
Next, open the excel template document and enter the approval flows into the document. Make sure to save the document.

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 *OT Requisition* and click the Upload button to upload the approval flow information from the selected excel document into the system.

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

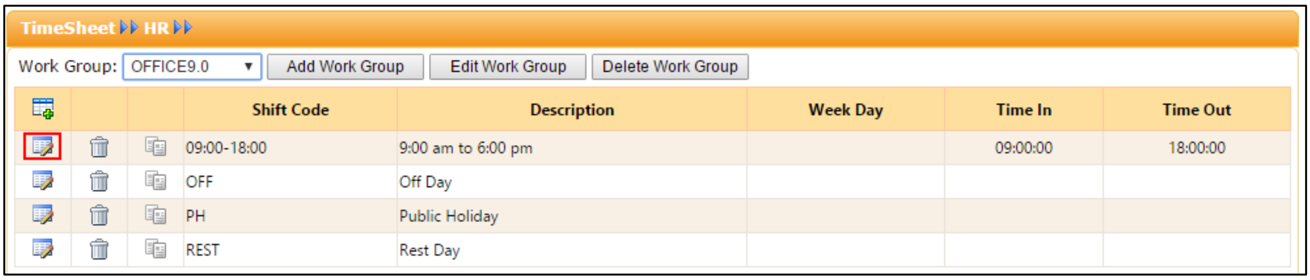
You can export the system's approval flow into an excel document. To do so, first retrieve the list of approval flows and then click on the Export button.

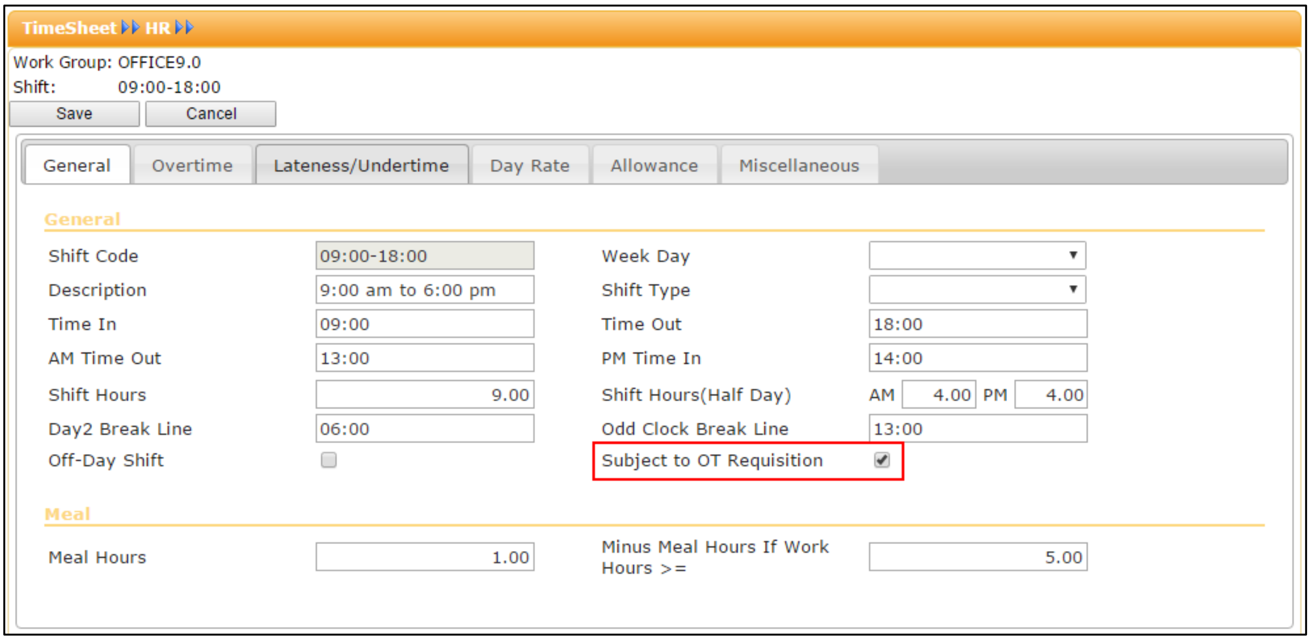


Chapter 4. Enabling Shifts to be used in OT Requisition

When you create new shifts or use existing shifts in the Shift Setup, these shifts will need to be **subjected to OT Requisition**. Without doing this, overtime requisitions cannot be submitted for them.

To do this, access the shift's profile web page at **Shift Setup** web page.





At the shift's profile web page in the General tab, tick the checkbox for "Subject to OT Requisition" to enable the shift for overtime requisitions.

Ensure that the shift's overtime rates have been setup.

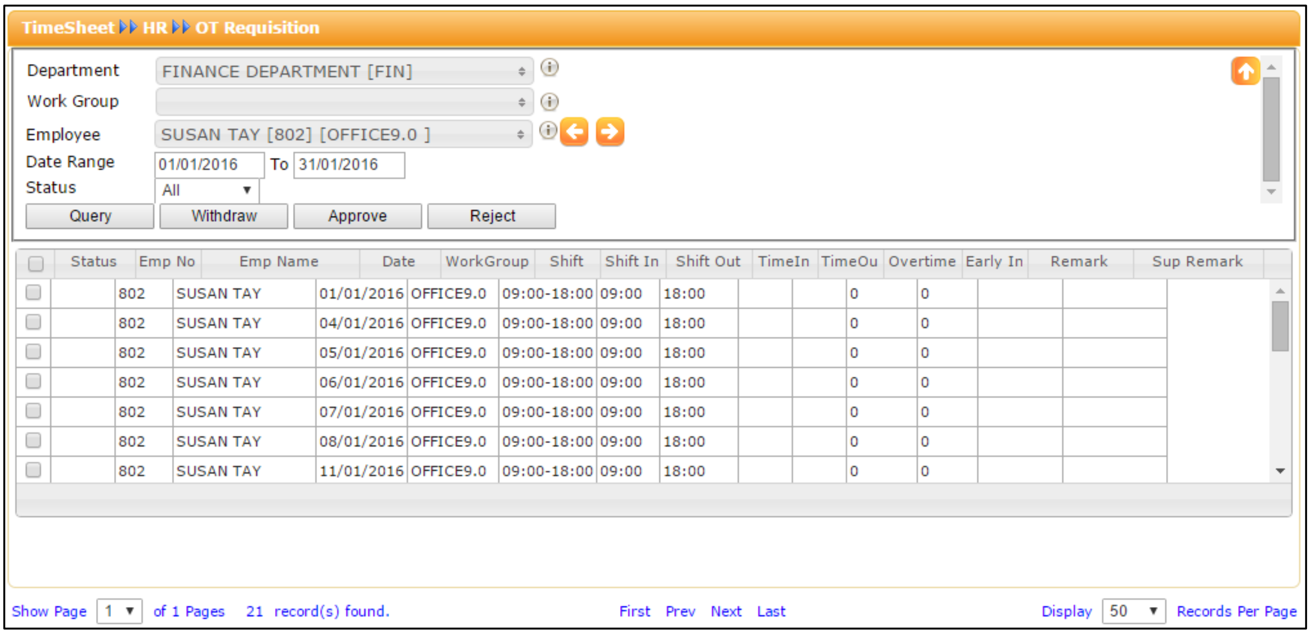
Click Save button to save your changes.

Chapter 5. OT Requisition

In the OT Requisition web page you can requisite overtime for employees, view, edit, approve, withdraw and reject submitted overtime requisitions.

To access the OT Requisition web page, click on the **OT Requisition** option at the HR menu.

5.1 Retrieving employees' shift records

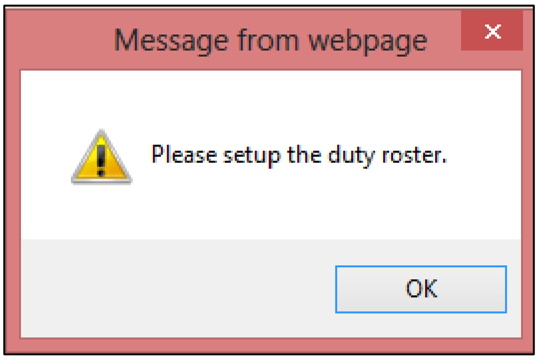


To begin, you will need to define the search criteria for retrieving the employees' shift records.

Expand the search criteria options by clicking on the button to view more criteria options.

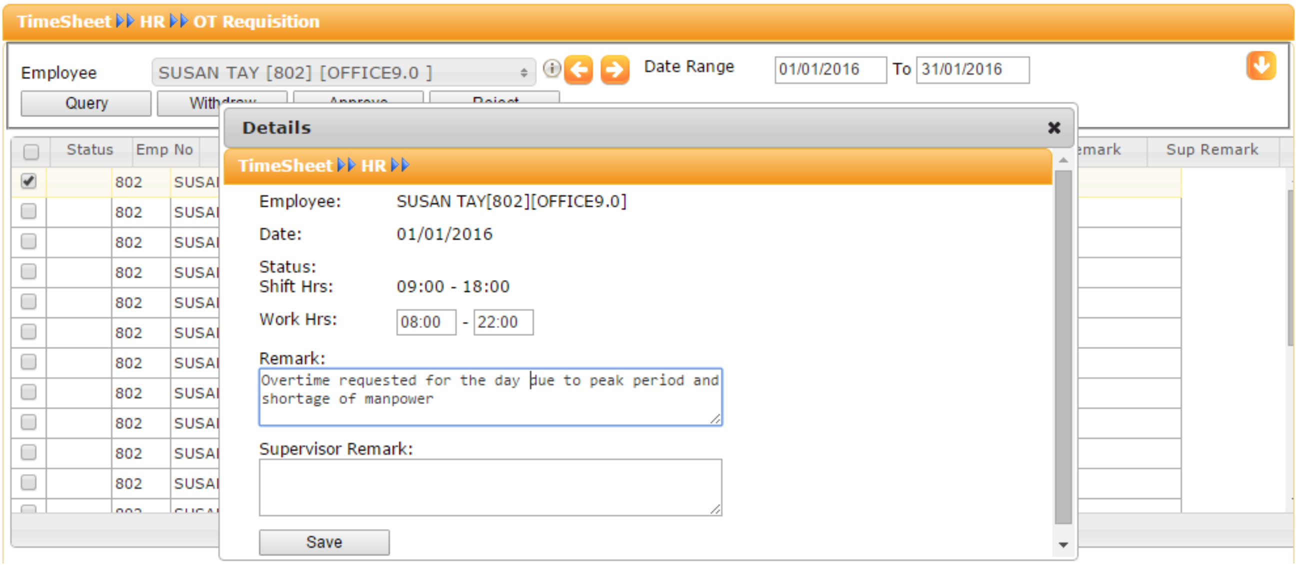
1. Choose the search criteria by selecting from the following:
   a. Choose one or multiple “Department”.
   b. Choose one or multiple “Work Group”.
   c. Choose one or multiple “Employee”.
   d. If you had selected multiple choices, you can view them by clicking on the button.
   e. The “Date Range” is defaulted to the start date and end date of the current month. You can choose a different “Date Range” by clicking on the date. This will open the **Calendar Picker** where you can choose your preferred day.
   f. Click on the “Status” drop-down list to choose to see shift records with overtime requisition status *Pending*, *Approved*, *Rejected* or *All*.
2. Click on the Query button to retrieve the shift record information based on your chosen criteria. You can browse each employee’s shift records by clicking on the navigation buttons.

If you encounter the pop-up warning message indicated below ensure **both** the employee’s shift has enabled the “Subject to OT Requisition” and the overtime requisition approval flow for the employee had been setup.



5.2 Entering and Submitting OT Requisitions

To requisite overtime for an employee, look for a shift record and double click on it.



Enter the new Time In and Time Out at “Work Hrs” for the shift. The system will be able to calculate the overtime hours requested based on the differences between the old shift timing and the newly entered timing. Time defined here earlier than the employee’s original shift hours will be counted as requested **Early In Overtime** hours. Likewise, time defined here that is later than the employee’s original shift hours will be counted as requested **Overtime** hours.

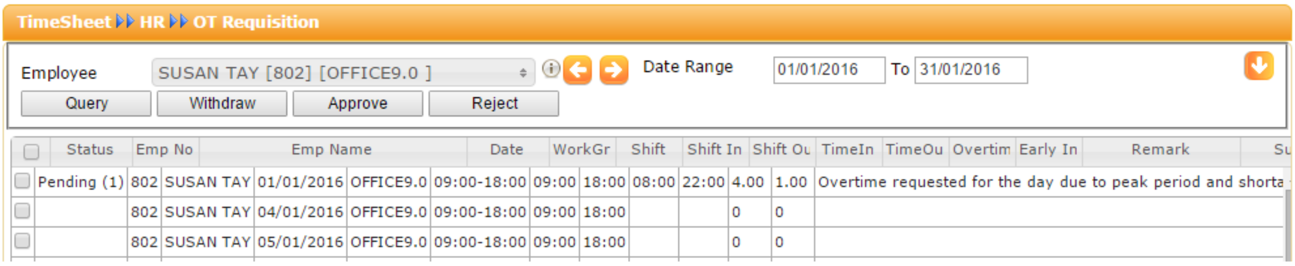
Here is an example:

Original Shift Hours Start	New Shift Hours Start	Early In Overtime Hours Requested	Original Shift Hours End	New Shift Hours End	Overtime Hours Requested
09:00	08:00	1	18:00	22:00	4

You cannot use the “Work Hrs” to try to shorten the employee’s original shift work hours. The system will warn you if you attempt to do so and the transaction cannot proceed.

Enter your remarks if any at “Remark” and/or “Supervisor Remark”.

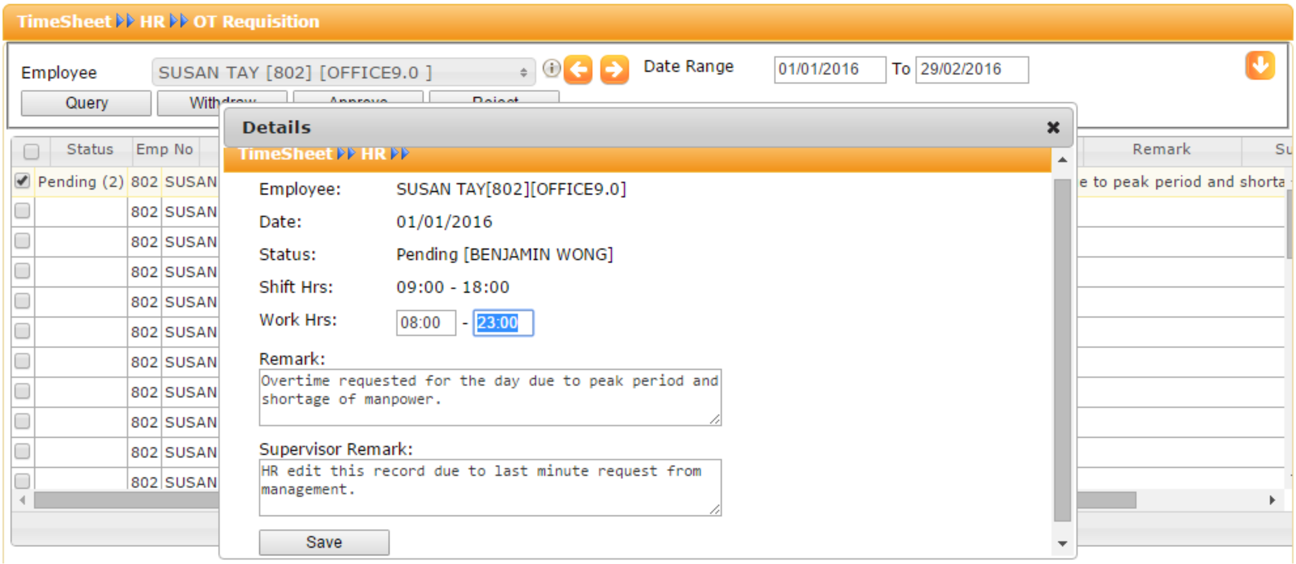
Click Save to save the record and submit the overtime requisition.



Once submitted, the record will be marked as *Pending* and routed to the first supervisor for review and approval. The system automatically calculates the early in overtime and overtime hours requested.

5.3 Editing a Submitted OT Requisition Record

To edit a submitted OT Requisition record, double click on the record.



Enter the new “Work Hrs”.

Enter or change remarks if any.

Click Save to save the record and submit the overtime requisition.

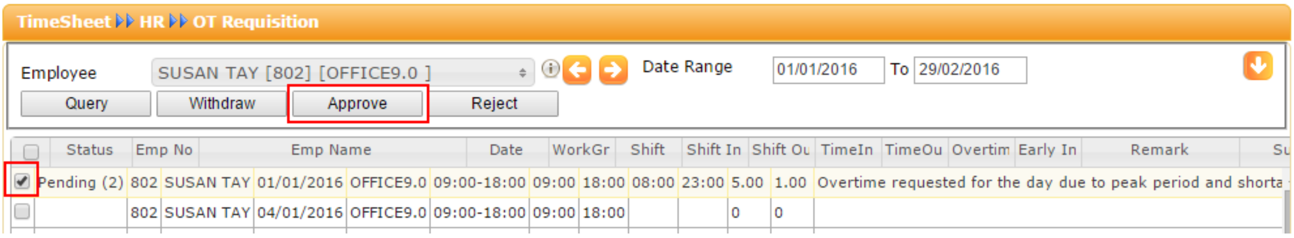
Once the record is submitted, the system automatically re-calculates the overtime hours requested based on the edited timings.

You can edit OT Requisition records of any “Status”. After you submit the edited record, the record’s “Status” will remain unchanged.

5.4 Approving OT Requisition

You can approve submitted OT Requisition records of any “Status”.

However, you cannot approve shift records that do not have any OT Requisition submissions. These records have “Status” blank.



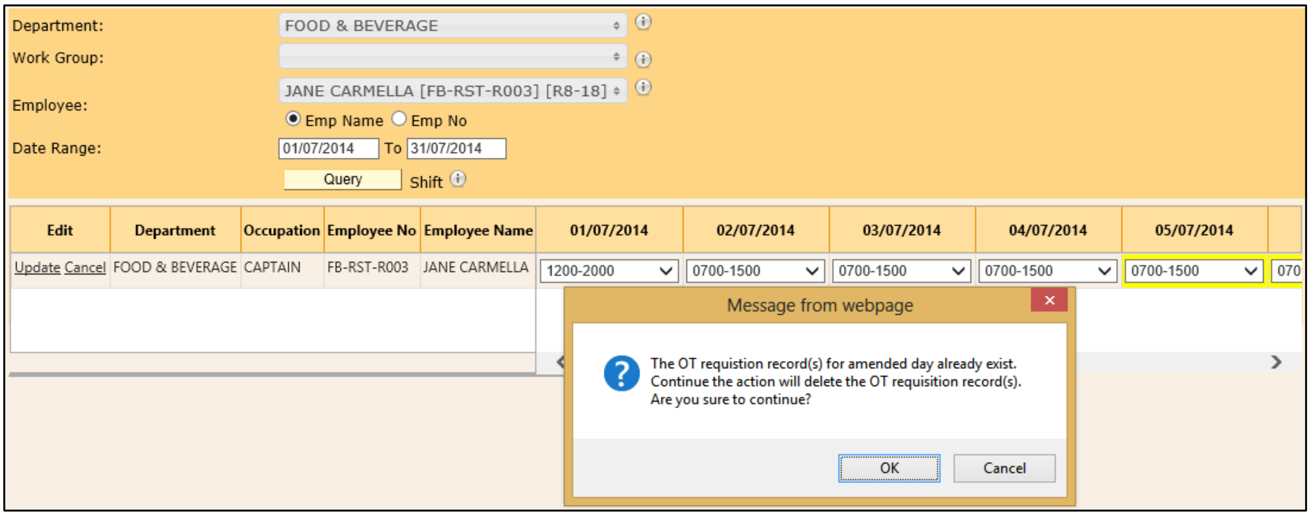
To approve a record, select a record by clicking on the checkbox next to the record and click the Approve button.

Once approved successfully, the record’s “Status” is marked as *Approved*.

The record’s requested overtime hours will take effect for the employee’s shift. The employee cannot earn more overtime hours than those that were approved in the OT Requisition for that shift.

Important note: Once overtime hours had been requested for the employee’s shift (OT Requisition Time Sheet “Status” is either *Pending*, *Approved* or *Rejected*), if you attempt to remove that shift from the employee’s Duty Roster, the system will ask you to acknowledge the deletion of the OT Requisition for that shift. Deleted OT Requisition records are unrecoverable.

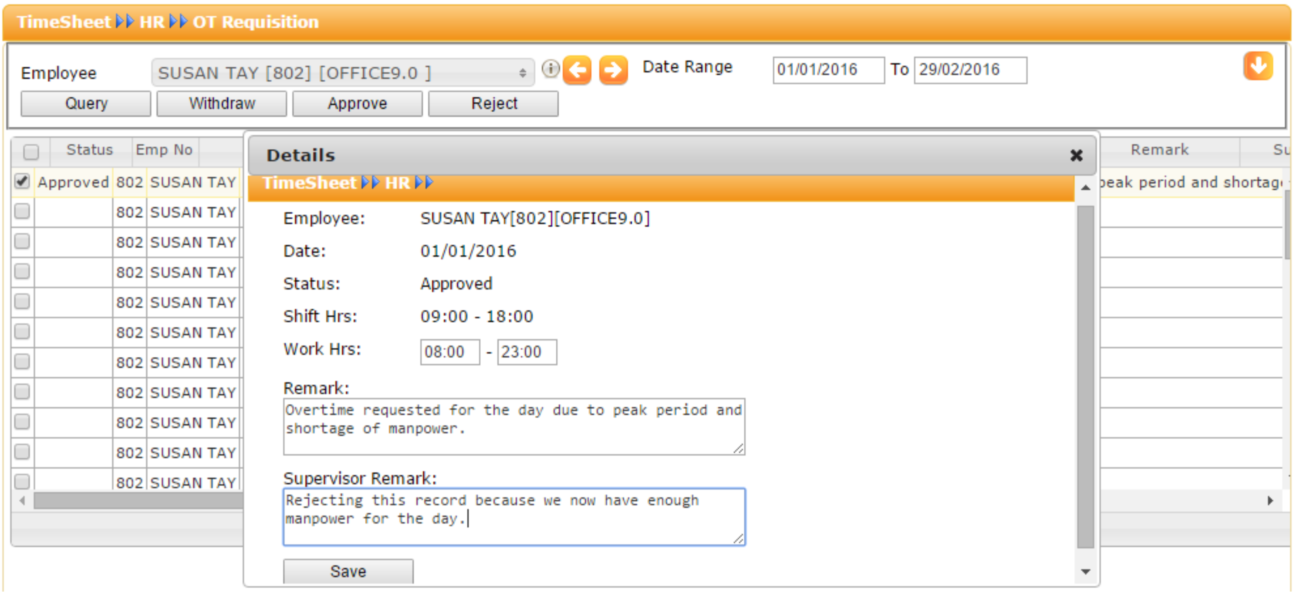
Do note that Supervisors can only change shifts that do not have OT Requisition records (OT Requisition Time Sheet “Status” blank) in the Duty Roster.



5.5 Rejecting OT Requisition

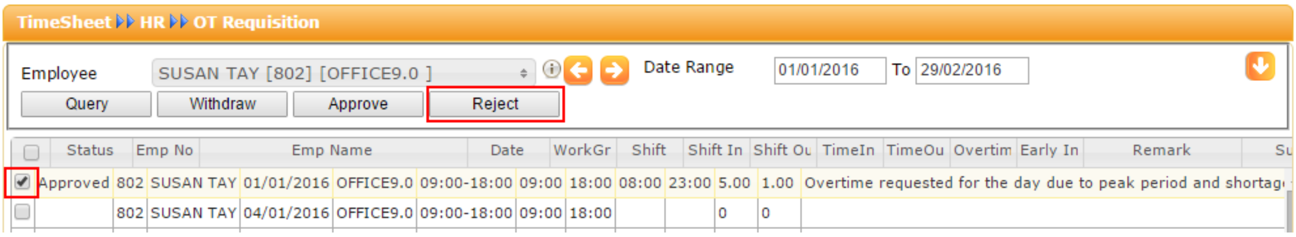
You can reject submitted OT Requisition records of any “Status”.

However, you cannot reject shift records that do not have any OT Requisition submissions. These records have “Status” blank.



Before rejecting the record, it is best to enter the reason for doing so. Double click on the record and enter your reason for rejecting this record at the “Supervisor Remark”.

Click Save button to save the changes.



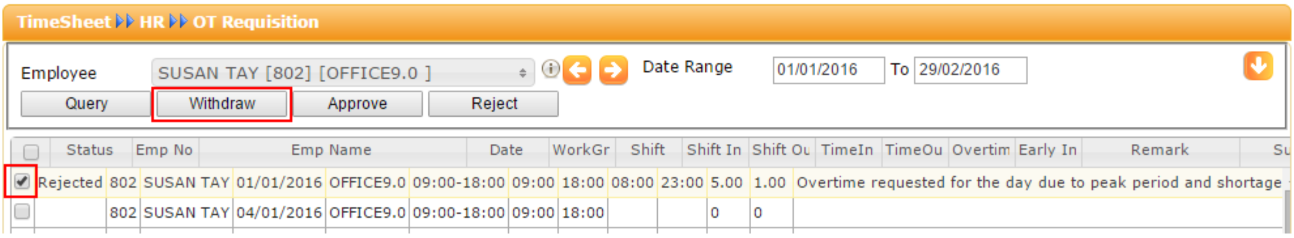
To reject the record, select the record by clicking on the checkbox next to the record and click the Reject button.

Once rejected successfully, the record’s “Status” is marked as *Rejected*. The record will be routed back to the Entry Officer for amendments.

5.6 Withdraw OT Requisition

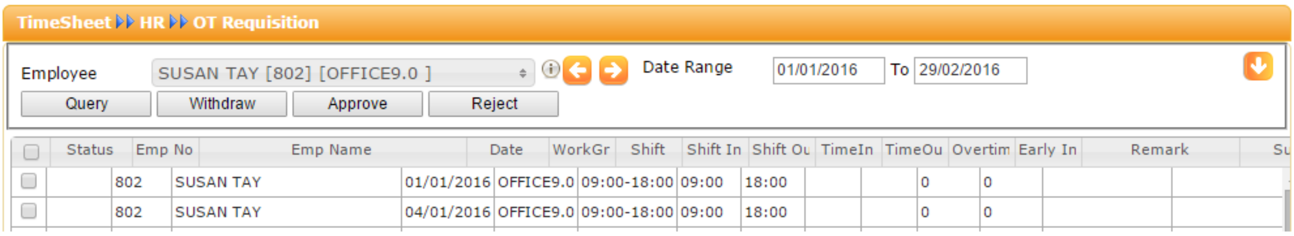
You can delete submitted OT Requisition records of any “Status”.

However, you cannot delete shift records that do not have any OT Requisition submissions. These records have “Status” blank.



To remove the OT Requisition record, select the record by clicking on the checkbox next to the record and click the Withdraw button.

Once the removal is successful, the record will show the shift record without any OT Requisition and will have the “Status” blank.



Deleted records are unrecoverable.

Chapter 6. Understanding the OT Requisition columns

This chapter explains the functions and purpose for each of the **OT Requisition** standard columns.

Status

"Status" blank indicates that the shift record has no OT Requisition.

If Entry Officer or Administrator submits a new OT Requisition record, the shift record's "Status" updates from blank to *Pending* with a *(x)* where *x* indicates which supervisor in the approval level needs to review the record.

If a Supervisor or Administrator rejects a record, the "Status" of that record will be updated to *Rejected*.

If a Supervisor or Administrator approves a record, the "Status" of that record will be updated to *Approved*.

Here are some examples:

"Status"	Meaning
blank	Shift record with no OT Requisition.
Pending (1)	Submitted OT Requisition pending review by 1st level Supervisor.
Pending (2)	Submitted OT Requisition pending review by 2nd level Supervisor.
Pending (3)	Submitted OT Requisition pending review by 3rd level Supervisor.
Approved	OT Requisition had been approved.
Rejected	OT Requisition had been rejected.

Entry Officer will need to make corrections to their rejected records and once submitted, these records will be updated to "Status" *Pending (1)* which will need the Supervisor or Administrator to review them.

Emp No

The employee number is shown here.

Emp Name

The employee name is shown here.

Date

The date for the shift.

WorkGroup

The employee's shift Work Group.

Shift

This is the shift that had assigned for the employee.

Shift In

The shift's original Time In / Start Time.

Shift Out

The shift's original Time Out / End Time.

TimeIn

OT Requisition's new Time In / Start Time for the shift. System will use this timing to find the difference between "Shift In" and "TimeIn" to calculate the Early In Overtime hours.

TimeOut

OT Requisition's new Time Out / End Time for the shift. System will use this timing to find the difference between "Shift Out" and "TimeOut" to calculate the Overtime hours.

Overtime

The calculated Overtime hours requested.

Early In

The calculated Early In Overtime hours requested.

Remark

The overtime requestor's remarks.

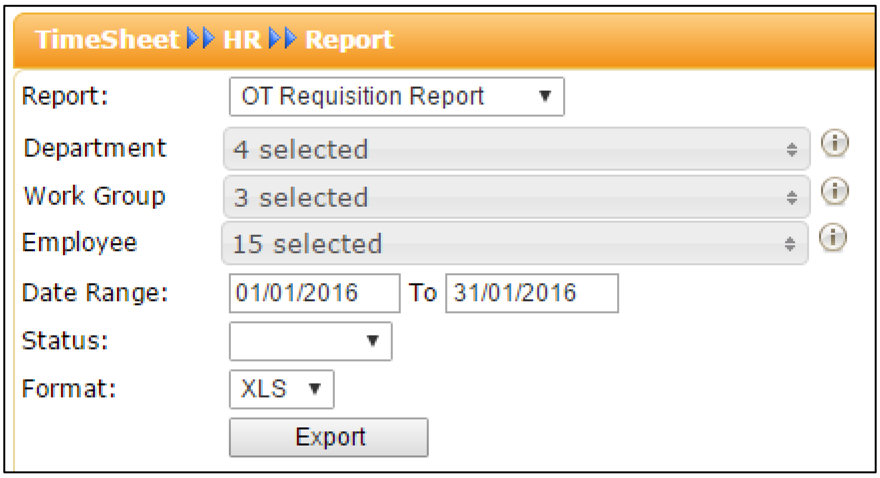
Sup Remark

The supervisor's remarks. Usually this is for the reason for rejecting the record.

Chapter 7. Report

You can access the OT Requisition Report by clicking the **Report** option at the HR menu.

At the Report web page, you are presented with the report criteria filters.



1. Choose ***OT Requisition Report*** at “Report” first followed by the criteria that you require such as “Department”, “Work Group”, “Employee” and “Date Range”. If multiple choices had been selected, clicking on the ⓘ button will show the selected items’ list in a **Dialog** pop up window.
2. The “Status” dropdown list criterion shows the list of **OT Requisition** statuses. Blank “Status” means all statuses.
3. Each report can be generated into an Excel or PDF document. Choose your desired report format at “Format”.
4. Click Export to generate the report.