



astutepayroll

Approvers Mini-Help Guide

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Overview

Astute Payroll is web based software that will assist HVTC to manage the administration of its employees and host businesses.

If you are reading the approver guide you are likely to be a manager or supervisor who is responsible for approving timesheets and expenses for hosted employees placed in your business by HVTC.

Approvers will either be the designated Primary Approver, or a nominated Secondary Approver.

- Primary Approvers are the main person responsible for this task.
- Secondary Approvers provide a backup in case the Primary Approver is unable to complete their tasks.

As an Approver, the system enables you to approve Timesheets and Expenses by email or online, and to access reports relating to your hosted employees.

This Mini-Help Guide is designed to give Approvers a quick overview of the key functions on the system.

Getting Started

HVTC will set up access for you on the system. This will automatically send you an email with your login details.

The new user email will provide you with your username and password. It will also direct you to the relevant URL to login.

Logging In

1. You will see a login screen that looks like this image – although with HVTC's logo.
 - a. If you forget your Username or Password, select 'Forgot password'.
 - b. You can then enter your username or email address - and your details will be sent to your registered email address.
2. When logging in you may be presented with Terms and Conditions that you need to review and acknowledge.
3. Once logged in you can change your password in the profile section. You are not able to change your username.



System Overview

Your system contains the following sections listed below.

Note: Expenses will only be visible if hosted employees reporting to you are permitted to submit expenses.

Menu	Description
Dashboard	Provides you a quick snap-shot of information about hosted employees assigned to you, their respective job(s), and all related Timesheet(s) / Expense(s).
Timesheets	Allows you to approve Timesheets and view Timesheet history.
Expenses	Allows you to approve Expenses and view Expense history. Please note that the Expenses module must be switched on by HVTC for it to appear as a menu option.
Reports	Provides you with access to a range of reports relating to the hosted employees who work for you. You can also access previous timesheets and batch them into PDFs.
Profile	Allows you to view and edit information relating to your own profile.



Approving Timesheets & Expenses

There are two main ways in which a Primary Approver may approve a Timesheet/Expense.

By Email

This is the most popular method for approving Timesheets and can be done from anywhere that you can access your email account, such as your mobile phone.

When a hosted employee submits a Timesheet, the system will automatically send the Primary Approver an email with the Timesheet and an option to approve or reject the Timesheet by email, or by logging into the system.

When you click Approve or Reject a webpage will open. If this does not happen then the action has not been registered and you will need to login to the system to complete the approval/rejection.

When you reject a Timesheet/Expense the web page that opens will provide a field for you to provide a reason if you chose. If you don't wish to provide a reason simply click 'Submit'.

Please note: If your hosted employee has attached a file to their electronic timesheet (e.g. a signed paper copy of the timesheet, a medical certificate or other proof of work) you will be required to log in to the portal and approve the timesheet.

Please note: If your hosted employee is submitting expenses on timesheets (rather than separately through the Expense feature), you will need to log in and approve the timesheet through the portal.

By Logging In

This option is typically only used for people approving more than 10 Timesheets/Expenses as it enables you to 'Bulk Approve'. It is also the only way that Secondary Approvers can approve/reject timesheets/expenses.

To action Timesheets through the system select the 'Timesheets' tab and either:

- Tick the check box for each Timesheet and select 'Approve Selected Timesheets' (reject function not available from this screen).
- Select each Timesheet individually and click 'Reject' or 'Approve' on the timesheet.

To Action Expenses through the system select the 'Expenses' tab.

- All expenses Pending Approval are presented in the Pending Approval tab.
- To view the Expense Report simply click on the expense report name. This will open up the report in a pop up screen – if you don't see this screen please ensure that your system allows pop-ups.
- To approve/reject the report, back on the Pending Approval screen simply click on the approve/reject button associated with the particular report.

Your hosted employees will be notified by email that you have approved/rejected their timesheet.

Secondary Approvers

If you are listed as a Secondary Approver you will not receive the timesheet approval email. You will receive a reminder to log in and approve the timesheet directly from the portal.

Automated Reminders

If a Timesheet (requiring approval) has not been actioned by 12:30pm Monday the Primary Approver will receive a system generated reminder. If a Primary Approver has not actioned a Timesheet by 2:00pm Monday the Secondary Approver will receive a system generated reminder.

Once a Timesheet is approved it will be ready for payroll. If a Timesheet is rejected it will be returned to the hosted employee for correction and resubmission.

Automated reminders are not issued for Expenses.

Reports



The Reports module enables you to access reports to assist with the overall management of hosted employees reporting to you.

Reports can be exported to CSV (Excel) format by clicking the 'Export to CSV' function at the top right-hand corner of the screen.

Report Type	Description
Allocated Employees	This report details all hosted employees for whom you are assigned to either as their Primary or Secondary Approver. It also lists the associated Field Officer and Job Duration.
Search	<p>The Record Search report enables you to view all Timesheets and Expenses in the system for hosted employees associated with you (where you are either the Primary or Secondary Approver).</p> <p>You can narrow and sort your search through the various filter options available.</p> <p>You are also able to select one or more timesheets/expenses and export these to PDF. You have the option of exporting all selected timesheets/expenses in one PDF or into individual PDFs.</p>

The screenshot shows the 'Allocated Employees' report page. At the top, there is a navigation bar with 'Reports' selected. The page title is 'Allocated Employees'. On the left, there is a sidebar with 'Allocated Employees' highlighted. The main content area features a table with columns: Employee, Workplace, Recruiter, and Job Duration. Two rows of data are visible for 'ANDREWS, Amy'. Below the table, it says 'Total 2 Employees'. At the bottom, there is a 'Per page' dropdown set to '25 items' and a pagination control showing '1 of 1'. An 'Export all to CSV' link is located in the top right corner of the report area.

Employee	Workplace	Recruiter	Job Duration
ANDREWS, Amy	Head Office	None Assigned	4.2.2013 to 11.3.2013
ANDREWS, Amy	over there	None Assigned	4.2.2013 to 11.3.2013

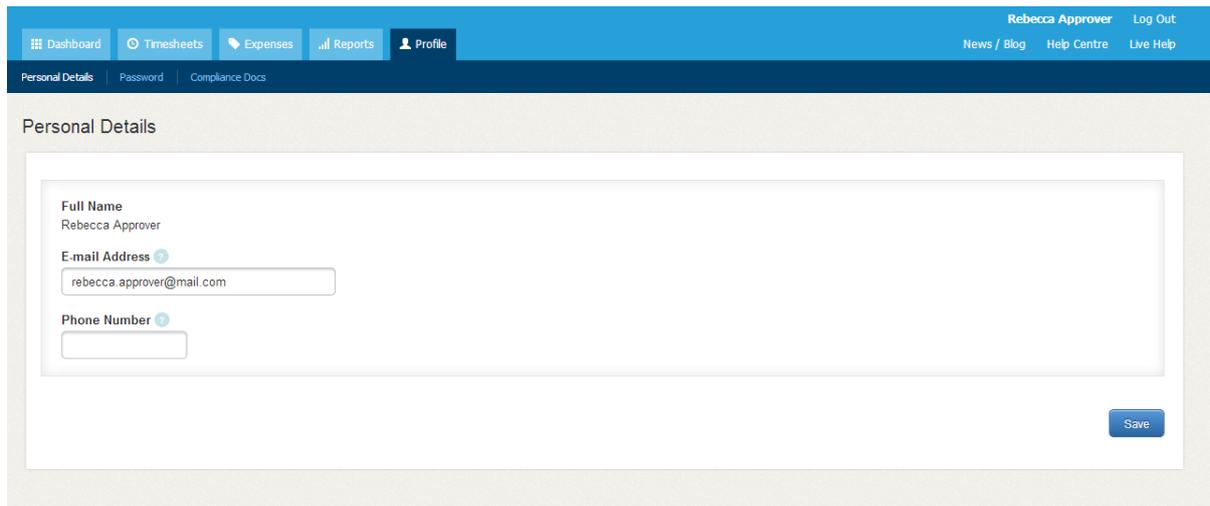
Profile



The Profile Tab is the section where your personal and employment details are kept.

For ease of reference, your profile is separated into the following Tabs:

- Personal details – name, email address and phone number.
- Password – change your password under this tab.
- Compliance Docs – details of any Terms and Conditions acknowledged by you.



The screenshot shows the user interface for the Profile page. At the top, there is a navigation bar with tabs for Dashboard, Timesheets, Expenses, Reports, and Profile. The Profile tab is selected. Below the navigation bar, there is a sub-navigation bar with tabs for Personal Details, Password, and Compliance Docs. The Personal Details tab is selected. The main content area shows the Personal Details form with the following fields:

- Full Name: Rebecca Approver
- E-mail Address: rebecca.approver@mail.com
- Phone Number: (empty field)

A Save button is located at the bottom right of the form.