



Supervisor Product User Manual



SUPERVISOR USER GUIDE

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To Do Items

TimesheetX will automatically load the *To-Do Items* page after the user logs in. (It can also be accessed from the TimesheetX menu **TimesheetX > TimesheetX Employer Home (To Do)**). All time sheets presented on this page require immediate attention.

The screenshot shows the 'To Do Items' interface. At the top, there are filters for 'Cost center' (set to 'All Cost Centers') and 'Filter by timesheet status' (with options like 'Returned To Supervisor (0)', 'Incomplete By Supervisor (15)', 'Delinquent Timesheets (538)', 'Resubmitted By Employee (0)', and 'Pending Approval (3)'). Below the filters is a toolbar with icons for 'Export Summary', 'Export Details', 'Print Timesheets', 'Approve Timesheets', 'Reject Timesheets', 'Dismiss Timesheets', 'Take Possession', and 'Email Students'. The main area displays a table of time sheets with columns: Name, Job, Hours, Break Mins, Employee Deadline, and Last Modified. The table shows several entries, including those for Samuel d Rogers, Roy a Rogers, and Frank c Rogers, with various job titles and deadlines.

Time sheets can be organized under five possible categories:

- *Returned to Supervisor* – These time sheets have been reviewed by an administrator and returned to you. A note attached to each time sheet will explain why the time sheet is returned, and you must resolve the problem before resubmitting it to an administrator for approval. To review the time sheet details, either hover over the magnifying glass or click the magnifying glass to manage the time sheet individually.
- *Incomplete by Supervisor* – These are time sheets begun by a supervisor that have not been completed. Once a time sheet is begun by a supervisor, it cannot be edited by an employee, thus a supervisor **must** complete it. To review the time sheet details, either hover over the magnifying glass or click the magnifying glass to manage the time sheet individually.
- *Delinquent Timesheets* – These time sheets may or may not have been started by employees (as indicated in the *Last Modified* column); regardless, they were never submitted for approval, and the employee deadline has passed. To send an individual e-mail reminder to the employee or to take control of a specific time sheet, click the magnifying glass.
- *Resubmitted by Employee* – These are time sheets revised and resubmitted by employees for your approval. They must be approved by the deadline listed next to them.
- *Pending Approval* – These time sheets have been completed by employees and submitted for your review. They must be approved by the deadline listed next to them.

NOTE 1: Only those categories currently with time sheets to display will appear on the *To-Do Items* page. For example, if there are no delinquent time sheets, that particular table will not display.

NOTE 2: If you'd like to manage multiple time sheets in a particular status at one time, simply click the box next to each time sheet you wish to manage and then click on the specific icon of the function you wish to complete.

► **Below is a legend of icons and corresponding mass time sheet functions.**



Export Summary - This function will provide high level time sheet details you see on the screen for those time sheets selected.



Export Details - This function will provide detailed time sheet entries into an excel spreadsheet for those time sheets selected.



Print Timesheets - This function will provide a user friendly print version for those time sheets selected.



Approve Timesheets - This function will enable the Supervisor to approve those time sheets selected as long as the time sheet(s) are in a status that can be approved.



Reject Timesheets - This function will enable the Supervisor to reject those time sheets selected as long as the time sheet(s) are in a status that can be rejected.



Dismiss Timesheets - This function will enable the Supervisor to dismiss those time sheets selected as long as the time sheet(s) are in a status that can be dismissed.




Take Possession - This function will enable the Supervisor to take possession of those time sheets selected as long as the time sheet(s) are in a status that can be rejected.

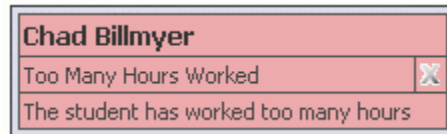
► **Change Departments**

If you supervise employees in multiple departments, you will have a drop-down menu at the top of the *To-Do Items* page. When you select a different department, the page will reload and display the to-do items for that department's time sheets. Be sure to get in the habit of checking the *To-Do Items* **for all the departments that you manage**.

► Warnings

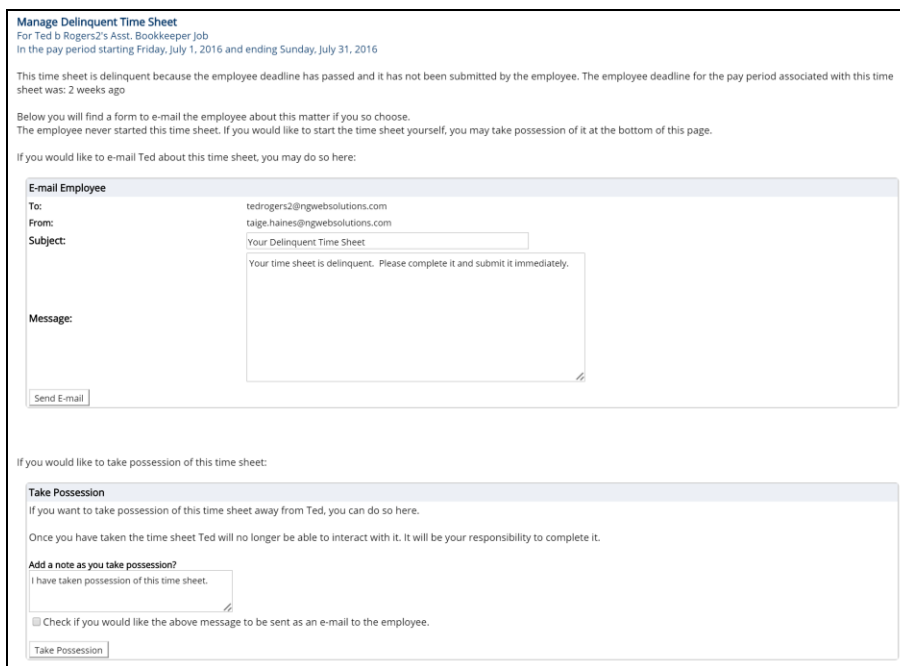
Administrators may want to alert you to particular situations through the use of warnings. If you receive a warning, it will display at the top of your *To-Do Items* page in a salmon-colored box.

This warning pictured above is alerting you to the fact that one of your employees, Chad Billmyer, has worked too many hours. If a warning has a  next to the title, please hover your mouse over it for instructions on how to resolve the warning.



Manage Delinquent Time Sheets

When an employee's time sheet is delinquent, you have two options: 1) you can e-mail the employee to remind him or her to submit it or 2) you can take hold of the time sheet -- revoking employee access -- and finish it yourself. By clicking the magnifying glass next to the delinquent time sheet on the *To-Do Items* page, you can access both functions.

A screenshot of a web form titled "Manage Delinquent Time Sheet". The form is for Ted b Rogers's Asst. Bookkeeper job, covering the pay period from Friday, July 1, 2016, to Sunday, July 31, 2016. It explains that the time sheet is delinquent because the deadline has passed. The form offers two options: "E-mail Employee" and "Take Possession". The "E-mail Employee" section includes fields for "To:" (tedrogers2@ngwebsolutions.com), "From:" (taige.haines@ngwebsolutions.com), and "Subject:" (Your Delinquent Time Sheet). There is a text area for the message body with the text "Your time sheet is delinquent. Please complete it and submit it immediately." and a "Send E-mail" button. The "Take Possession" section includes a "Take Possession" button and a checkbox for "Add a note as you take possession?" with a text area containing "I have taken possession of this time sheet." and a checkbox for "Check if you would like the above message to be sent as an e-mail to the employee.".

The top section of this page allows you to send a reminder e-mail to the employee. Edit the subject and body of the message, then click [Send E-mail](#).

To take possession of the time sheet, click [Take Possession](#) from the bottom section of the page. Place a check mark just above the button if you would like to accompany the action with an e-mail to the employee. You can revise the body of the e-mail in the small text box. Once you click [Take Possession](#), the time sheet will load and you can revise it as you wish. (See the *Manage Time Sheet* section of this document for more information.)

My Control Panel

Unlike the *To-Do Items* page, which displays only the jobs and time sheets demanding immediate attention, *Timesheet Control Panel* allows you access to all jobs for which you are the primary or secondary supervisor, regardless of whether they are in need of attention. *Timesheet Control Panel* is also the place to locate past time sheets.

Click **TimesheetX > Timesheet Control** to access the *My Control Panel* function.

My Control Panel

Welcome, Taige Test Employer

Cost Center
STUDENT EMPLOYMENT ▾

Show archived hire data?

Jobs for which I am the primary supervisor

Analyst IV	Manage Job	View Hires
Assistant III	Manage Job	View Hires
Asst. Bookkeeper	Manage Job	View Hires
Bookkeeper III	Manage Job	View Hires
Installation Specialist	Manage Job	View Hires
Supervisor II	Manage Job	View Hires
Supervisor III	Manage Job	View Hires

Jobs for which I am a secondary supervisor

Installation Specialist	Manage Job	View Hires
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Click [Manage Job](#) to change the title or description of the job.

When you select [View Hires](#), a list of your employees for that job will open:

The screenshot shows a web interface titled "My Control Panel" with a welcome message for "Taige Test Employer". It includes a "Cost Center" dropdown set to "STUDENT EMPLOYMENT" and a checkbox for "Show archived hire data?". Below this, there are two sections: "Jobs for which I am the primary supervisor" and "Jobs for which I am a secondary supervisor". The primary supervisor section lists jobs like "Analyst IV", "Assistant III", and "Asst. Bookkeeper", each with "Manage Job" and "View Hires" links. A table of employees is shown below, with columns for Employee Name, Extras, Current Time sheet, All Time sheets, Orig. Award Amt, Award Balance, Hire Dates, Wage, and Status. The table lists three employees: Roy a Rogers1, Roy a Rogers1, and Ted b Rogers2. The secondary supervisor section lists "Installation Specialist" with "Manage Job" and "View Hires" links.

Employee Name	Extras	Current Time sheet	All Time sheets	Orig. Award Amt	Award Balance	Hire Dates	Wage	Status
Roy a Rogers1	Details	N/A	All time sheets	1500.00	1500.00	1/1/2013 - 5/31/2013	8.00	Active
Roy a Rogers1	Details	N/A	All time sheets	1000.00	1000.00	8/1/2014 - 8/31/2015	10.00	Active
Ted b Rogers2	N/A	Create time sheet	All time sheets	1800.00	1800.00	7/1/2016 - 6/30/2017	15.00	Active

Next to each employee are additional functions. Hover your mouse over [Details](#) and a status update will appear, including any potential delinquent time sheets.

Click [Go to Time Sheet](#) to access to current time sheet that is pending approval.

To view a history of this employee's time sheets, click [All Time Sheets](#). A new window will load in which you can view the detail of every past time sheet. For those past time sheets still in need of approval or revision, [All Time Sheets](#) will also provide you that functionality.

Manage Time Sheet

The *Manage Time Sheet* page cannot be accessed directly from the TimesheetX menu. Instead, it appears only when you try to access a specific time sheet.

Information will appear differently, or not all, depending on the status of the time sheet and your permission level.

For instance, when the time sheet is in the employee's possession the only information available will be the status and pay period details. The entries and action options would not appear.

Manage Time Sheet
Employee [Roy A Rogers1](#)
Job Title [AB Tech - 061516](#)
Status Incomplete
Pay Period 07/01/16 - 07/31/16
Deadline **August 1, 2016 5:00 PM**

Time Sheet Entries									
Date	Pay Code	Start	End	Break	Total	Edit	Delete	Manual Check	
Friday, July 01	HRS	8:00 AM	1:00 PM	--	5 hrs	Edit	Delete	<input type="checkbox"/>	
» Add New Entry									
Total:					HRS	5 hrs			
Approve		Reject		Lock		Select All			

Class Schedule

Course Title	Start Date	End Date	Days	Start	End
Coll Reading&Stdy SKI (details)	08/01/2015	07/31/2016	Tu Th	11:00 AM	12:15 PM
Found of Sport Mgmt (details)	08/01/2015	07/31/2016	M W F	1:00 PM	1:50 PM
Fresh Sem-Sport Mgt (details)	08/01/2015	07/31/2016	M W	2:00 PM	3:15 PM
Pre-Algebra (details)	08/01/2015	07/31/2016	Tu Th	12:30 PM	2:20 PM

Pay Period Info [Accruals](#) [Hire Details](#) [Awards](#) [Supervisors](#) [Accounts](#) [Notes](#)

07/01/16 - 07/31/16
Start - Friday, July 1, 2016
End - Sunday, July 31, 2016
Employee Deadline - Monday, August 1, 2016 (12:00PM)
Supervisor Deadline - Monday, August 1, 2016 (5:00PM)
Pay Date - Monday, August 15, 2016

Depending on your permissions, some of the time sheet management options may not appear. To take action on a time sheet, the supervisor must select one of the action buttons (e.g. Approve, Reject, Lock, Select All). If a time sheet has already been paid outside of TimesheetX, click on the 'Manual Check' box for next to the time sheet entry to prevent a duplicate payment from being made. If your institution does not utilize this feature, this column will not be present on this screen.

The top section of the page informs you of the time sheet's status and important dates. *Deadline* refers to the date by which you must approve this time sheet and submit it to an administrator.

Carefully review the employee's time entries before you approve them.

Click the Notes tab to make a manual note or review audit related notes created by the system. Notes are viewable by administrators, other supervisors, and employees. Notes remain attached to a time sheet through the admin approval process and are retained even after a pay period is finalized.

Search & View Student Awards and Class Schedules

To search and/or view Student Award and Class Schedule data, click the **TimesheetX > Search Student Awards and Class Schedules** function.

- 1 ▶ Enter the Employee's Last Name or Employee ID.
- 2 ▶ Click their name returned in the Search Results box.


Supervisor Employee Search Panel

Find Employees, Awards and Class Schedules:

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Employee Id:	<input type="text" value="111111111"/>
<input type="button" value="Find Employees"/>	

Search Results:

Employees
Roy a Rogers1



If the Employee has any current awards or Class Schedules loaded to TimesheetX, they will be presented as follows:

Employee Details					
Current Awards					
Award Name	Amount	Balance	Term		
College Work Study	\$1,000.00	\$1,000.00	CWS Academic Year 2016 - 2017 (06/01/2016 - 05/31/2017)		
Federal Work Study	\$2,800.00	\$2,800.00	FWS Academic Year 2016 - 2017 (06/01/2016 - 05/31/2017)		
Graduate Assistant Stipend	\$1,000.00	\$1,000.00	CWS Academic Year 2016 - 2017 (06/01/2016 - 05/31/2017)		
Current Class Schedule					
Course Title	Start Date	End Date	Days	Start	End
Coll Readng&Stdy Skl (details)	08/01/2015	07/31/2016	Tu Th	11:00 AM	12:15 PM
Found of Sport Mgmt (details)	08/01/2015	07/31/2016	M W F	1:00 PM	1:50 PM
Fresh Sem-Sport Mgt (details)	08/01/2015	07/31/2016	M W	2:00 PM	3:15 PM
Pre-Algebra (details)	08/01/2015	07/31/2016	Tu Th	12:30 PM	2:20 PM

Budget Manager – Budget Details

If your institution utilizes the TimesheetX Budget Manager function to proactively prevent departmental budget overspend situations, Supervisors may be granted access to monitor their own cost center/departmental budgets.

In order to review your cost center/departmental budget information, navigate to the TimesheetX menu and click the *Budget Details* function. Select the current budget period you wish to review from the Budget drop down list.



This screen will present your cost center/departmental Current Budget, Actual Earnings spent against that budget, and Actual Remaining Budget Balance. Additionally, this page will inform you of a threshold that has been set, if any.

If the Actual Remaining Budget amount goes below a set threshold, a systematic email and/or screen notification will be initiated if checks appear in the ‘Email?’ or ‘Screen?’ boxes next to the department’s budget details.



Manage Budget Details

Budget 2015 - 2016 Budget (7/1/2015 - 6/30/2016) ▾

Current Budget: \$21,500.00
Total Earnings: \$1,624.25
Total Remaining Budget Balance: \$19,875.75

 **Export Details**
  **View All Notes**

Select All / De-Select All
 Show 25 results per page
 1 to **3** of **3** | << < > >> |

Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Threshold	Email?	Screen?	
<input type="checkbox"/> COMPUTER SCIENCE	\$11,500.00	\$1,624.25	\$9,875.75	\$200.00	☑	☑	
<input type="checkbox"/> STUDENT EMPLOYMENT	\$10,000.00	\$0.00	\$10,000.00	\$250.00	☑	☑	

Budget Manager – Budget Dashboard


In order to further examine your cost center/departmental budget information, navigate to the TimesheetX menu and click the *Budget Dashboard* function. Select the current budget period you wish to review from the Budget drop down list.





Budget Manager Dashboard

Budget: 2015 - 2016 Budget (7/1/2015 - 6/30/2016) ▾

Cost Center: All cost centers ▾

Filter: No Filter ▾

 Export Details

Cost Center Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Original Projected Earnings	Current Projected Earnings	Projected Remaining Budget Balance	
COMPUTER SCIENCE	\$11,500.00	\$1,624.25	\$9,875.75	\$55,496.22	\$56,411.89	(\$44,911.89)	 
STUDENT EMPLOYMENT	\$10,000.00	\$0.00	\$10,000.00	\$7,671.45	\$7,671.45	\$2,328.55	 

► **This screen will present the following departmental budget information:**


- *Current Budget:* The current allocated budget amount for the department.
- *Actual Earnings:* Actual earnings are calculated from finalized time sheets within the current budget period selected.
- *Actual Remaining Budget Balance:* The ‘Actual Remaining Budget Balance’ is calculated by subtracting Actual Earnings from Current Budget Amount.
- *Original Projected Earnings:* The Original Projected Earnings calculates the sum of all potential earnings (by multiplying wages by maximum hours per week) for all hires in all jobs, within the current budget period selected for the cost center/department.
- *Current Projected Earnings:* The Current Projected Earnings is calculated by adding the maximum potential earnings from time sheets within the current budget period, and not yet finalized, to the amount already finalized/paid. Time sheets that have been dismissed are not included in this calculation.
- *Projected Remaining Budget Balance:* The Projected Remaining Budget Balance is calculated by subtracting Current Projected Earnings from the Current Budget Amount for the cost center/department.





Please Note: If you should need the definition provided above for each column on the screen above, simply hover over the column heading and the definition will be presented.

To drill down at a cost center/departmental level to examine budget data at a job, hire, and time sheet level, simply click on the magnifying glass to the far right.

Budget Manager Dashboard

Budget: 2015 - 2016 Budget (7/1/2015 - 6/30/2016) ▾
 Cost Center: All cost centers ▾
 Filter: No Filter ▾


 Export Details













Cost Center Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Original Projected Earnings	Current Projected Earnings	Projected Remaining Budget Balance	
COMPUTER SCIENCE	\$11,500.00	\$1,624.25	\$9,875.75	\$55,496.22	\$56,411.89	(\$44,911.89)	 
STUDENT EMPLOYMENT	\$10,000.00	\$0.00	\$10,000.00	\$7,671.45	\$7,671.45	\$2,328.55	 

This view will enable you to see the Original Projected Earnings, Current Projected Earnings and Actual Earnings at a job level for that cost center/department.

Job Budget Details - COMPUTER SCIENCE
[Budget Dashboard Home](#) > Jobs

Budget Info
 2015 - 2016 Budget (07/01/2015-06/30/2016)
 No Filter ▾

 Export Details

COMPUTER SCIENCE Jobs	# of Hires	Original Projected Earnings	Current Projected Earnings	Actual Earnings	
		\$55,496.22	\$56,411.89	\$1,624.25	
Job Title					
Accountant I	1	\$3,462.89	\$3,462.89	\$0.00	  
Admission Asst - 041814	0	\$0.00	\$0.00	\$0.00	  
Analyst II	1	\$2,102.88	\$2,178.88	\$76.00	  
Anderson Web Analyst - 022316	1	\$3,462.89	\$3,462.89	\$0.00	  

To drill down at a cost center/departmental level to examine hire earnings for the job, simply click on the magnifying glass to the far right.

Hire Budget Details - COMPUTER SCIENCE
[Budget Dashboard Home](#) > [Jobs](#) > [Hires](#)

Budget Info
 2015 - 2016 Budget (07/01/2015-06/30/2016)
 No Filter

[Export Details](#) [View Timesheets](#)

COMPUTER SCIENCE Analyst II Job	Original Projected Earnings	Current Projected Earnings	Actual Earnings
	\$2,102.88	\$2,178.88	\$76.00

Hires that have already finished

Employee Name	Start Date	End Date	Hire Status	Original Projected Earnings	Current Projected Earnings	Actual Earnings	
Ted Rogers2	01/01/2015	12/31/2015	Active	\$2,102.88	\$2,178.88	\$76.00	

This view will enable you to see the Original Projected Earnings, Current Projected Earnings and Actual Earnings at a hire level for that job within that cost center/department.

To further drill down into the earnings of a specific hire either click on the person with a magnifying glass to the right to see the employee’s hire details or the time sheet with a magnifying glass to see their time sheet details.

Earnings Details – Hire Details

Hire Details
[<< Back to Budget Dashboard](#)

Employee	Cost Center	Job Title
Ted b Rogers2	COMPUTER SCIENCE	Analyst II

Current Status
ACTIVE

Budget Earnings

Budget	Cost Center	Projected Earnings	Actual Earnings
2015 - 2016 Budget (07/01/2015-06/30/2016)	COMPUTER SCIENCE	\$2,178.88	\$76.00
2014 - 2015 Budget (07/01/2014-06/30/2015)	COMPUTER SCIENCE	\$1,714.30	\$0.00

Hire Details | Time Sheets | Accruals | Hire Notes

Hire Instance Details

TimesheetX Hire ID	20837
Status	Active
Employee Name	Ted b Rogers2
Classification	Standard Student Employee
Job	Analyst II
Cost Center	COMPUTER SCIENCE
Wage	\$8.00
Start Date	Thursday, January 01, 2015
End Date	Thursday, December 31, 2015
Pay Schedule	Monthly Pay Schedule
Primary Supervisor	Taige Test Employer
Secondary Supervisors	

Earnings Details - Time Sheets

Hire Details

[<< Back to Budget Dashboard](#)

Employee	Cost Center	Job Title	
Ted b Rogers2	COMPUTER SCIENCE	Analyst II	
Current Status			
ACTIVE			
Budget Earnings			
Budget	Cost Center	Projected Earnings	Actual Earnings
2015 - 2016 Budget (07/01/2015-06/30/2016)	COMPUTER SCIENCE	\$2,178.88	\$76.00
2014 - 2015 Budget (07/01/2014-06/30/2015)	COMPUTER SCIENCE	\$1,714.30	\$0.00

[Hire Details](#)
[Time Sheets](#)
[Accruals](#)
[Hire Notes](#)

Time Sheets for Job: <i>Analyst II</i>					
Status	Pay Period	Start Date	End Date	Actual Earnings	Time Sheet
✘	12/01/15 - 12/31/15	Tuesday, December 01, 2015	Thursday, December 31, 2015		Start time sheet
✘	11/01/15 - 11/30/15	Sunday, November 01, 2015	Monday, November 30, 2015		Start time sheet
✘	10/01/15 - 10/31/15	Thursday, October 01, 2015	Saturday, October 31, 2015		Start time sheet
✘	09/01/15 - 09/30/15	Tuesday, September 01, 2015	Wednesday, September 30, 2015		Start time sheet
🚩	08/01/15 - 08/31/15	Saturday, August 01, 2015	Monday, August 31, 2015		Go to time sheet
✘	07/01/15 - 07/31/15	Wednesday, July 01, 2015	Friday, July 31, 2015		Start time sheet
✘	06/01/15 - 06/30/15	Monday, June 01, 2015	Tuesday, June 30, 2015		Start time sheet
✘	05/01/15 - 05/31/15	Friday, May 01, 2015	Sunday, May 31, 2015		Start time sheet
✘	04/01/15 - 04/30/15	Wednesday, April 01, 2015	Thursday, April 30, 2015		Start time sheet
✘	03/01/15 - 03/31/15	Sunday, March 01, 2015	Tuesday, March 31, 2015		Start time sheet
📅	02/01/15 - 02/28/15	Sunday, February 01, 2015	Saturday, February 28, 2015		Go to time sheet
📅	01/01/15 - 01/31/15	Thursday, January 01, 2015	Saturday, January 31, 2015	\$76.00	Go to time sheet