User Manual for US - Timesheet

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User Manual for US- Timesheet (BizX)

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Table Of Contents

1   General Information

BizX Employee Portal is a secure, user-friendly website that connects users to employee records, offering a clean, consistent design for mobile and tablet use, enhancing employee satisfaction. This document describes the 'Timesheet' module functionality to be used by different users for different purposes.

Overview

A timesheet is a method for recording the amount of a worker's time spent on each job. The objective of Timesheet Management System is to capture employee efforts against the allocated projects. With this system's help, employees can easily submit the timesheet for the previous and current week, which requires approval from their Reporting Manager.

The workflow is designed in such a way when employee submits the timesheet, an auto-generated email is triggered to the respective reporting managers to enable them to act upon.

Intended Audience

The "Timesheet" System is intended to be used by all India Infinite employees, US Employees.

Point of Contact

Please write us on BizX-Support@infinite.com for any queries or concerns.

Glossary / Abbreviations / Acronyms

Short Form	Explanation / Full form
CH	Company Holiday
RM	Reporting Manager

User Roles & Responsibilities

Persona Access Management

Below table defines the intended users with their permission levels:

S. No	Roles	Users	Role Description
1	Infinite US Employee	US Employees	Submit Timesheet
2	Infinite Reporting Managers	Reporting Manager	View Team member's timesheet/Approve/Reject
3	US payroll	US payroll	Unlock Timesheet

System View(s)

Employee View

- Timesheet page to submit timesheet.

Manager View

- Timesheet page – to submit timesheet.
- My Team Timesheet view – to approve or reject timesheet.
  - Pending List view
  - Approved View
  - Not Submitted View

Process Flow

Timesheet Module Flow

The 'Timesheet' process flow is shown in Image 1:
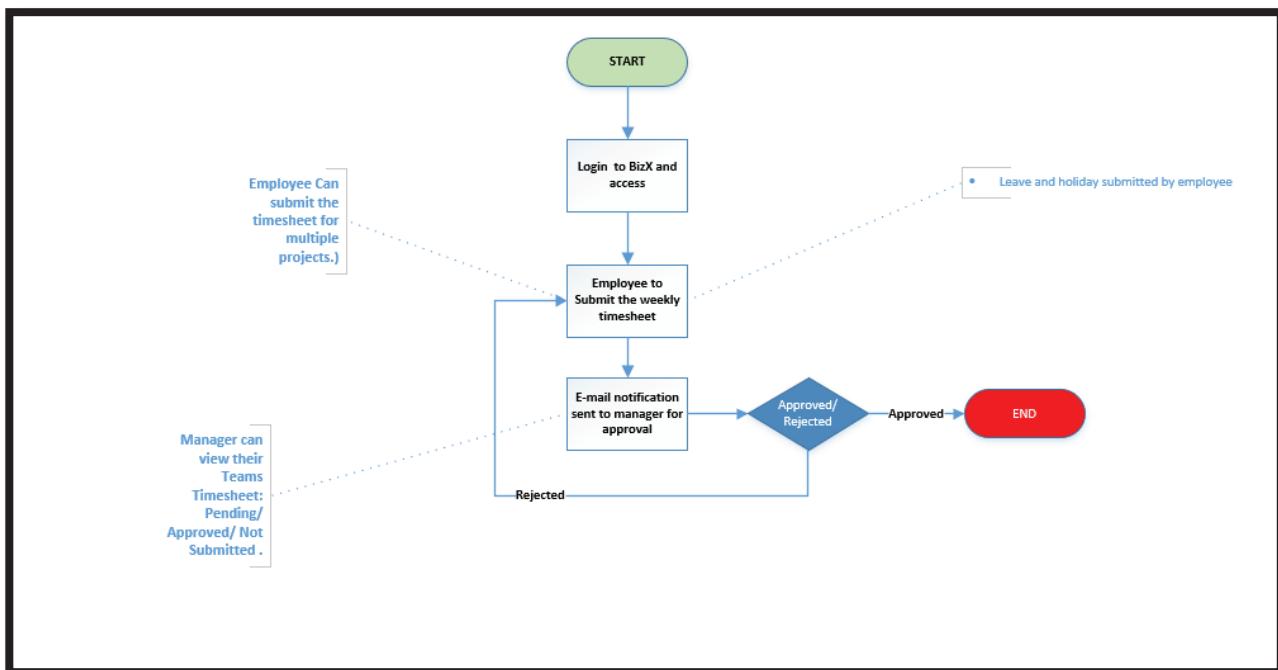
Image 1: Timesheet Module Process Flow

Getting Started

Logging On & Timesheet page

To submit the timesheet, the employee needs to login to BizX with their following Credentials.

Step's:

1. Upon successful login, the employee will be directed to the home page where they can view the timesheet tile (see Image 2).
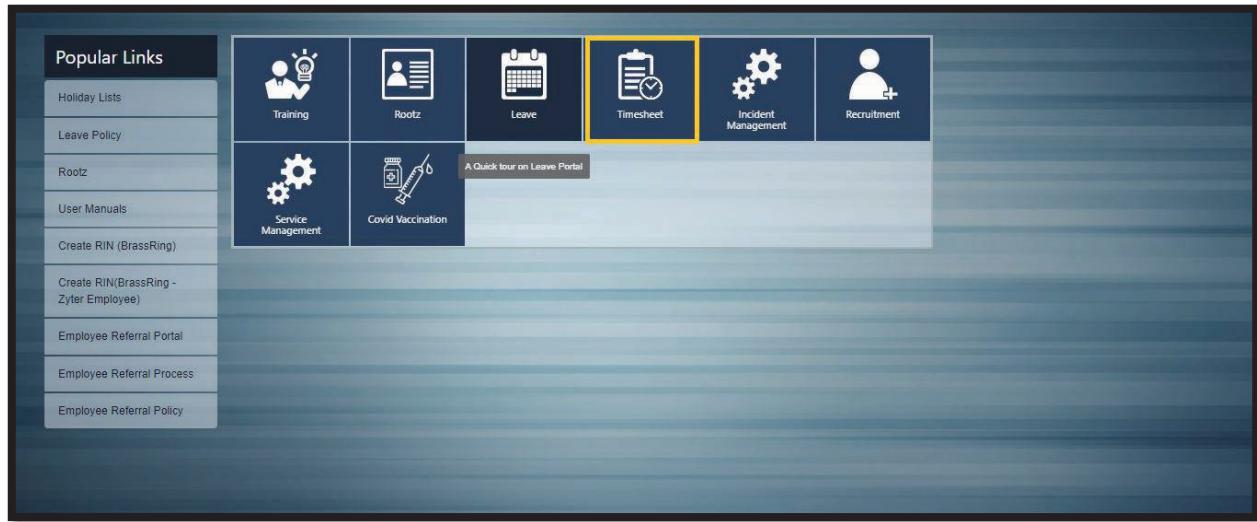
Image 2: BizX Home page

2. The employee will click on the timesheet tile where they can view the following options, (see Image 3).
    a. My Timesheet: Employee can submit the timesheet from here.
    b. Timesheet View: Employee can view the last 8-week timesheet details here.
    c. My Team Timesheet: RM will see their team timesheet from here.
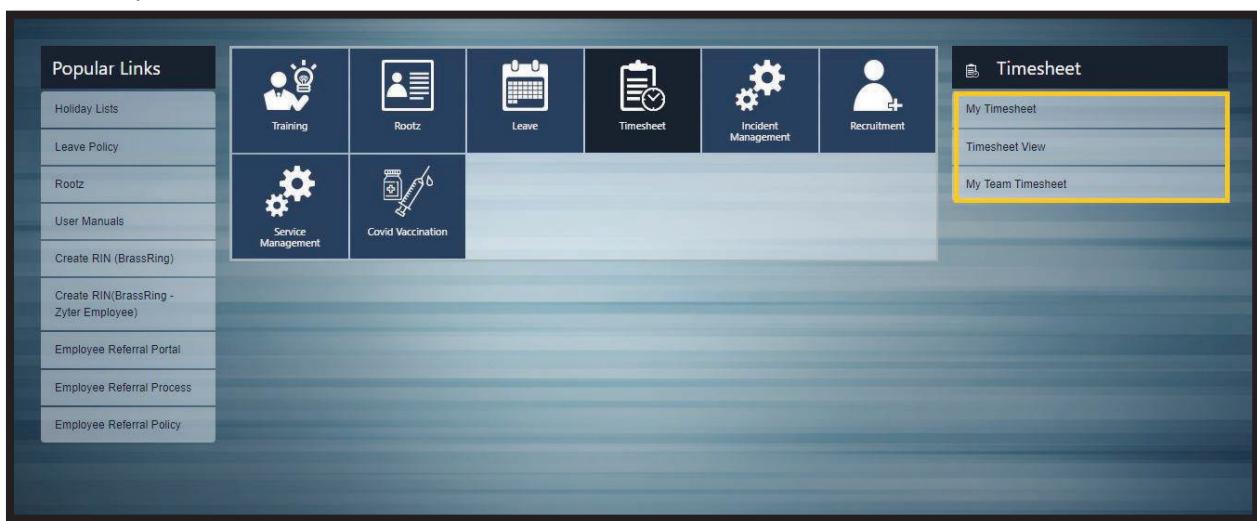
Image 3: BizX Timesheet Tile.

Timesheet Submission for US Employees:
   To submit the timesheet:

1. Employees can submit and save the weekly timesheets by selecting 'My Timesheet' from timesheet tile, (See Image 4).

Image 4: My Timesheet page.

2. In summary section employee can view their details like, (See Image 5):
   i. Employee No
   ii. Employee Name
   iii. Designation
   iv. ADP NO
   v. Client
   vi. Reporting Manager.

Image 5: Summary Section.

3. By default, the current week is selected; however, employees can access prior week's using the Back (<) button, but they cannot check future date, employees can change weeks using the calendar option, (See Image 6).

Image 6: My Timesheet week.

4. The employee can choose any week from the calendar, but by clicking on "Current week," they can return to the current week by default, (See Image 7).
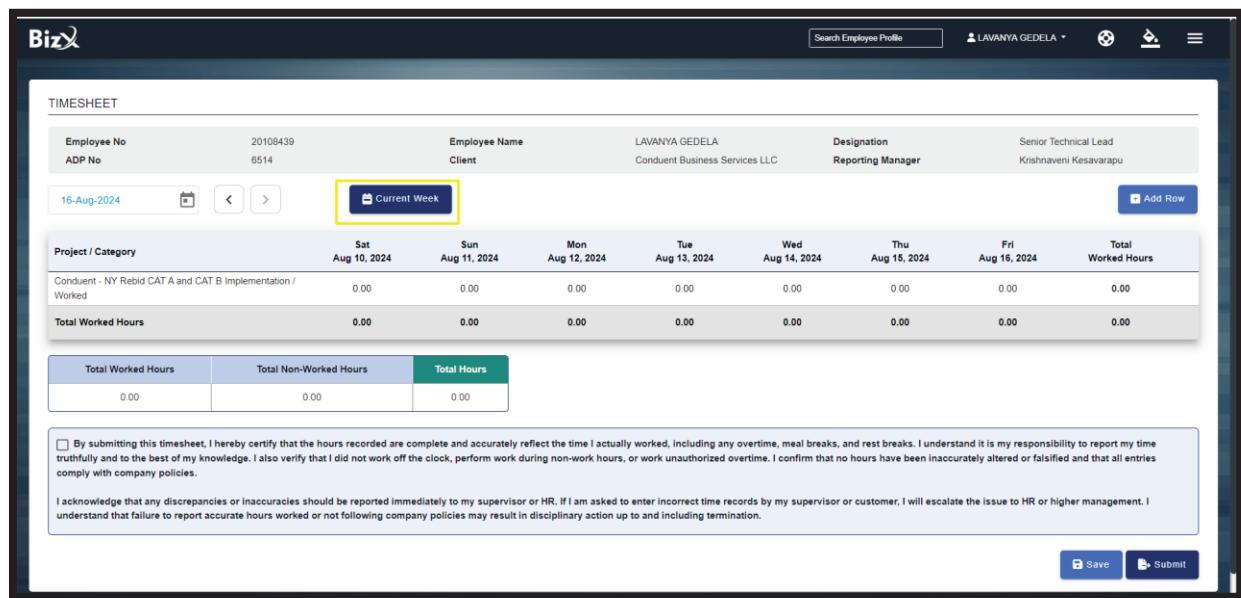
Image 7: Current Week.

5. Once employees fill their timesheets, users can check their:
   - Total hours worked,
   - Total hours non-worked,
   - Total hours

Image 9: Table format of worked hours and non-worked hours

6. Timesheet will have default category as 'Worked,' with the default hours 0' and the employee can modify the worked hours as they worked, (See Image 10).
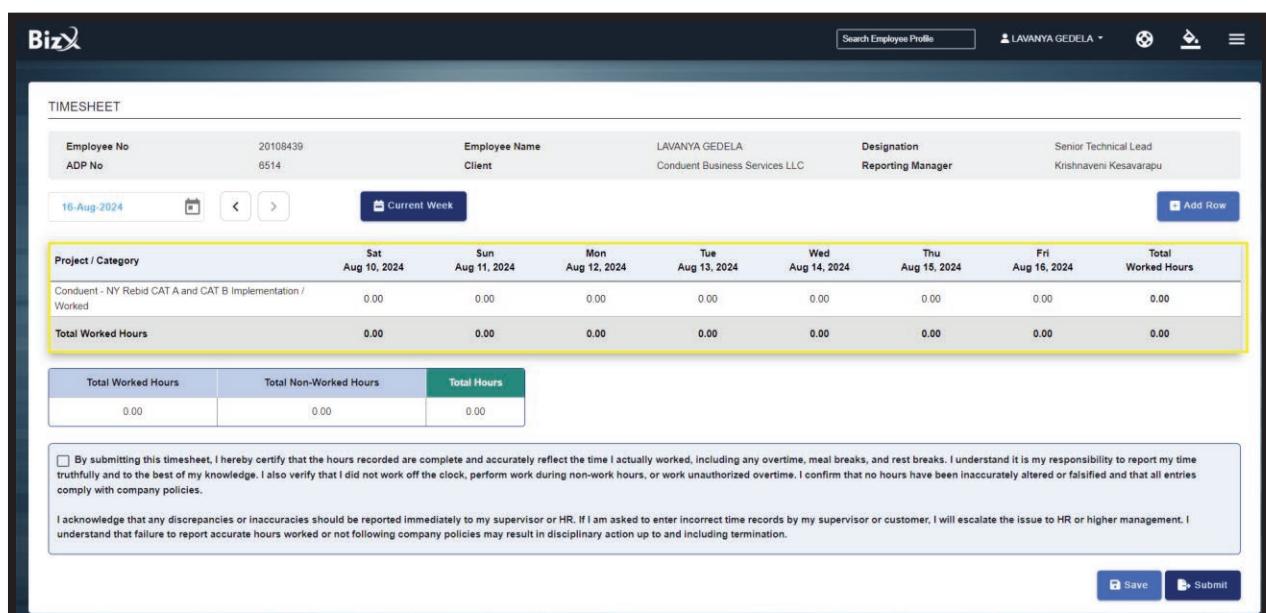
Image 11: consent box to submit timesheet

7. All hourly employees of Mandate states will have the non- worked hours only for
     i. Sick Leave/Personal
     ii. Jury duty
     iii. Bereavement leaves(See Image 14)

Image 14: Hourly employee of mandate states

8. Hourly Employees of the Mandate States will be able to have non- worked hours sub-category in which employee need to select one:
   - Jury duty
   - Bereavement leaves (See Image 15)

Image 15: Hourly employee of non-mandate states

9. All salaried employees can have all the types of Non work hours like
    i. Sick/personal.
    ii. Jury duty.
    iii. Holiday.
    iv. Bench time.
    v. Vacation.
    vi. Comp Time
    vii. Bereavement(See Image 16)

Image 16: Salaried employee.

10. Once an employee submits their non-work hours, that they will appear on the screen of their timesheet alongside their worked hours, rest breaks, and Meal breaks, (See Image 17).

11. For non-worked hours employee need to enter the time in timesheet to log it. (see image 18)

Image 18: Timesheet with non- worked hours

12. The employee can check there ST, OT, DPT hours in timesheet (see image 19)

- If user is working for more than 8 hours to 12 hours, it is calculated as OT Hours

Image 19: ST, OT, DOT Hours

13. If the employee is mapped to multiple projects the employees can add multiple projects to the same timesheet by using the "Add Row" button, (See Image 20). The new project row will be added below the worked row, and they can add hours based on their work on each project.

Image 20: Add Row

14. After clicking on add row employee need to select the project from drop down, (See Image 21):
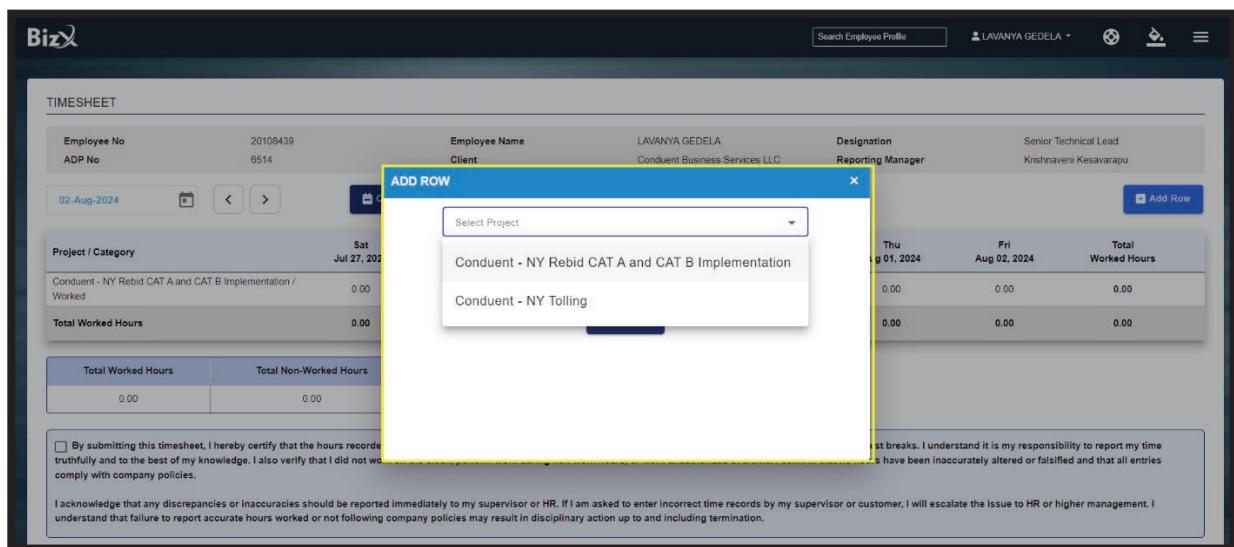
Image 21: Add multiple project

15. If the employee is working for multiple projects, they can add or delete the project from the timesheet, employee can click on delete icon to remove the project from timesheet (See Image 22):

Image 22: Added project

16. Click on 'Submit' button to submit the timesheet. A confirmation message will be displayed to the user to confirm whether the employee wants to submit the timesheet or not.

Timesheet View for Employees.

1. When the employees log in to BizX, click Timesheet module, the Hamburger menu will be display with "Timesheet view. (See in image 23)
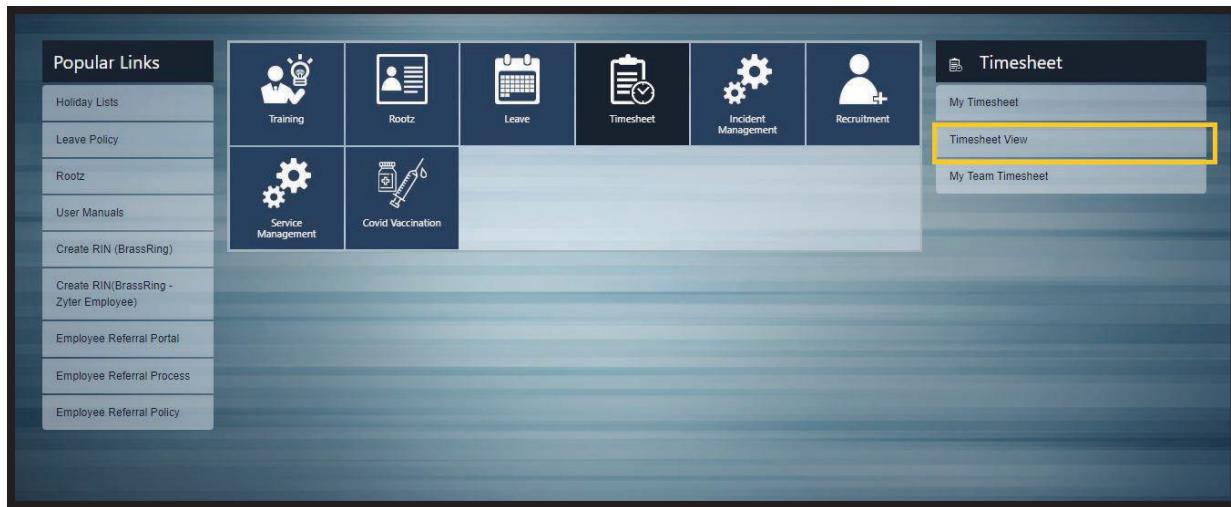

Image 23: BizX Timesheet Menu

2. Employee must click on 'Timesheet View' to view their Timesheet status for 8 weeks (about 2 months).and Employees can see their Total worked hours in each week and status of timesheet. (See in image 24)

Image 24: BizX Timesheet Menu

3. Once the employee clicks on view icon, the employee will be taken to my timesheet page to submit their timesheet for the specific week (See Image 25)

Image 25: My Timesheet View

Timesheet Approval/Rejection by RM

My Team Timesheet page View:

1. When the manager login to BizX, clicks Timesheet module, the Hamburger menu will be display with "My Team Timesheet. (see image 26)
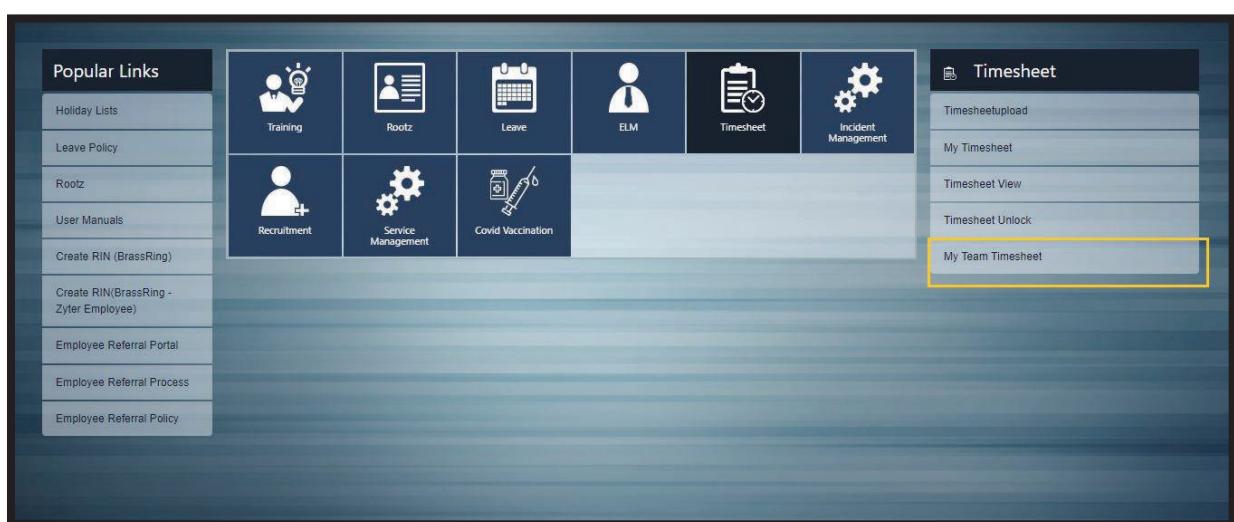
Image 26: Timesheet Menu for RM view

2. Managers must click on 'My Team Timesheet' to view their team's timesheet. Clicking on 'My Team Timesheet' link will display the 'My Team Timesheet' with pending, Approved, Not Submitted tab page. (see the image 27)

Image 27: My Team Timesheet page

3. Manager can Select the Timesheets to approve/Reject from Calendar, also can use the search bar to search the specific employee to accept/reject the timesheet. By default, the current week is selected; however, the Manager can access the prior week's Timesheet. (see the image 28)

Image 28: My Team Timesheet page

On 'My Team Timesheet' page, three tabs will be displayed: Pending, Approved, and Not Submitted.

1. **Pending tab**: This tab displays all the pending submitted timesheets that require an action from RM, either approve or reject. (see image 29)

Image 29: Pending Tab

a) **View Action**

To view the timesheet details.

      i.   RM can view the employee attendance details by clicking on the view icon. (see in Image 30).

Image 30: Approval Confirmation message

b) Approval Process

1. To approve the timesheet:
    i. Manager to access 'My Team Timesheet' page.
    ii. View the team's submitted entries in the 'Pending' list.
    iii. The RM can click on the 'Approve' icon to approve the timesheet. A confirmation message will display as shown in Image 31:
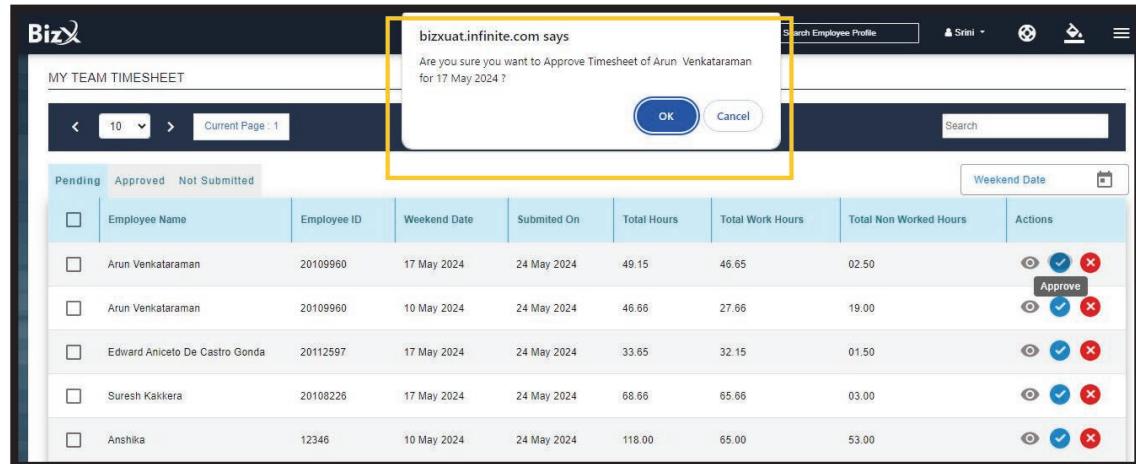
Image 31: Approval Confirmation message

    iv. Click 'OK' to approve the timesheet. A success message will be displayed to the user and the auto closes after 5 seconds.

2. Manager can select the checkbox of specific employee and approve either from actions approve icon or from approve button. (See Image 32)
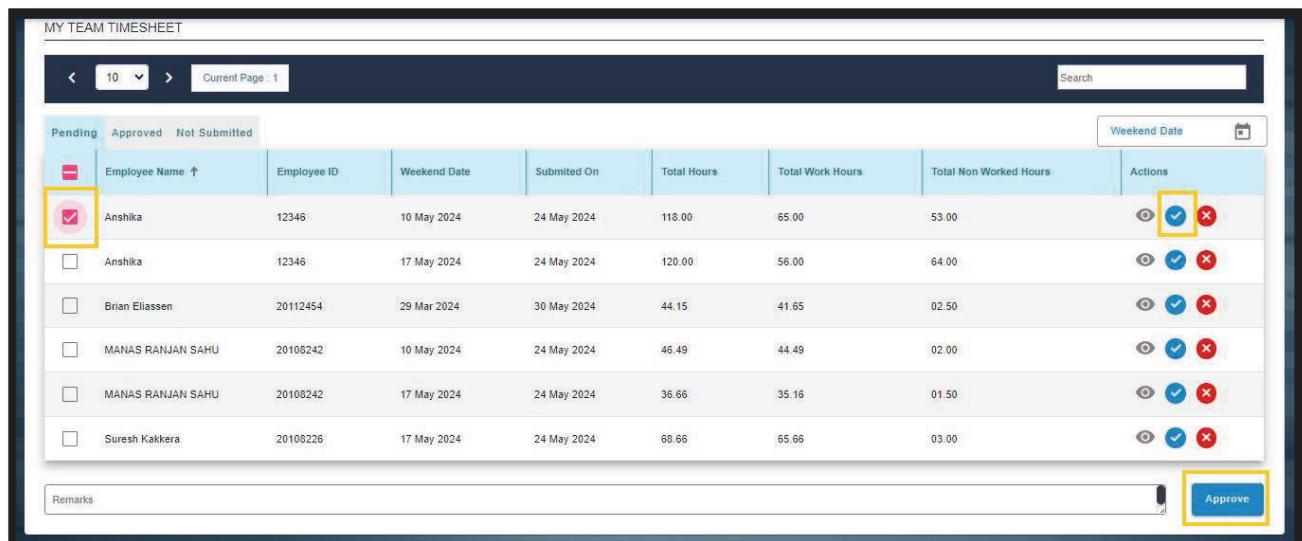
Image 32: Approval

3. To approve timesheets in bulk, the manager can select the checkbox, add a bulk remark, and click the Approve button. (See Image 33)

Image 33: Bulk Approval

4. The Manager can click on the Approve icon to approve the timesheet. A confirmation message will display (See Image 34)
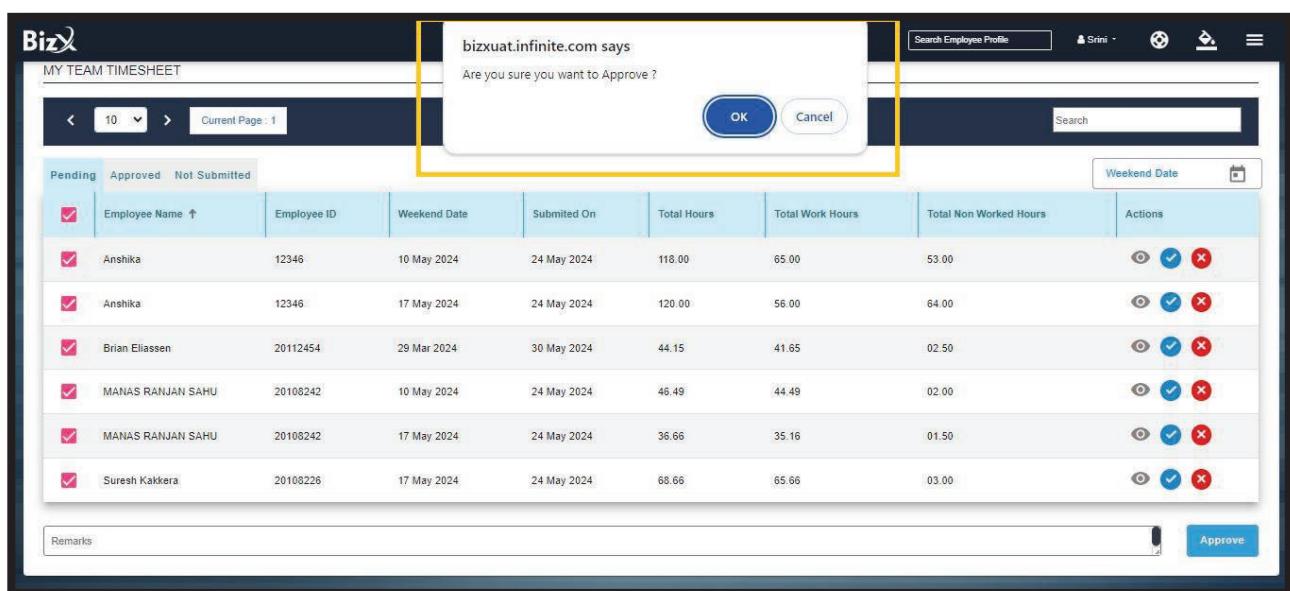

Image 34: Approval Confirmation message

5. Click 'OK' to approve the timesheet. A success message will be displayed to the user and the auto closes after 5 seconds. (See Image 35)
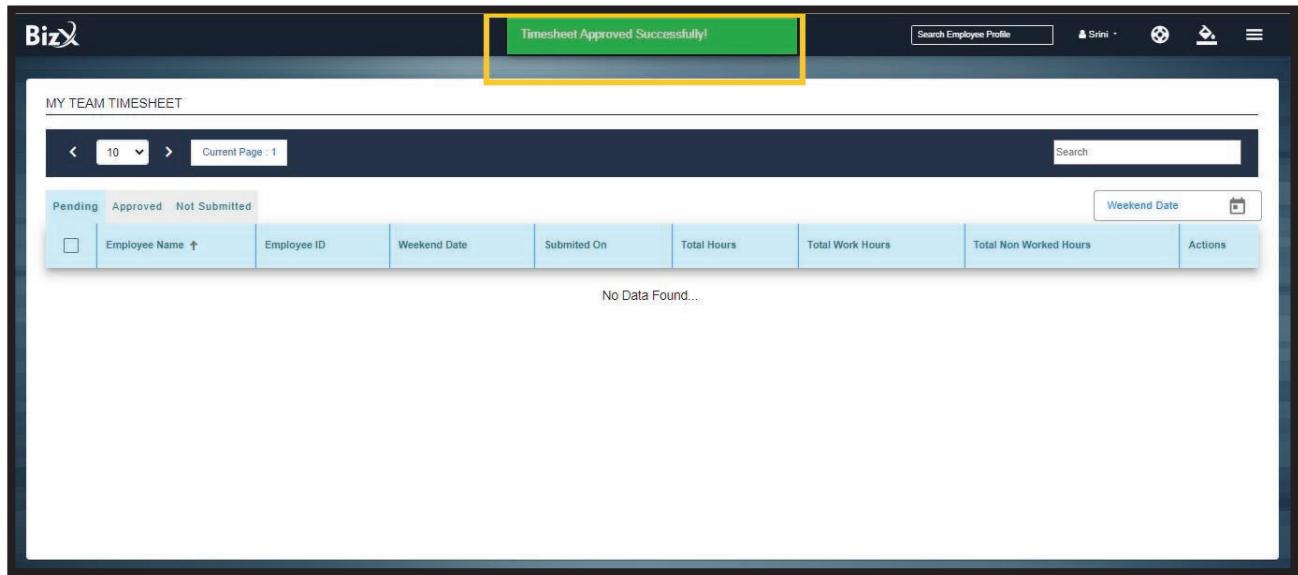

Image 35: Approval Successful Message

c) Rejection process

To reject the timesheet:

      I.   Manager to access 'My Team Timesheet' page.

    II.   View the team's submitted entries in the 'Pending' list.

   III.   The user can click on the 'Reject' icon to reject the timesheet. A confirmation message will be displayed (see in Image 36)
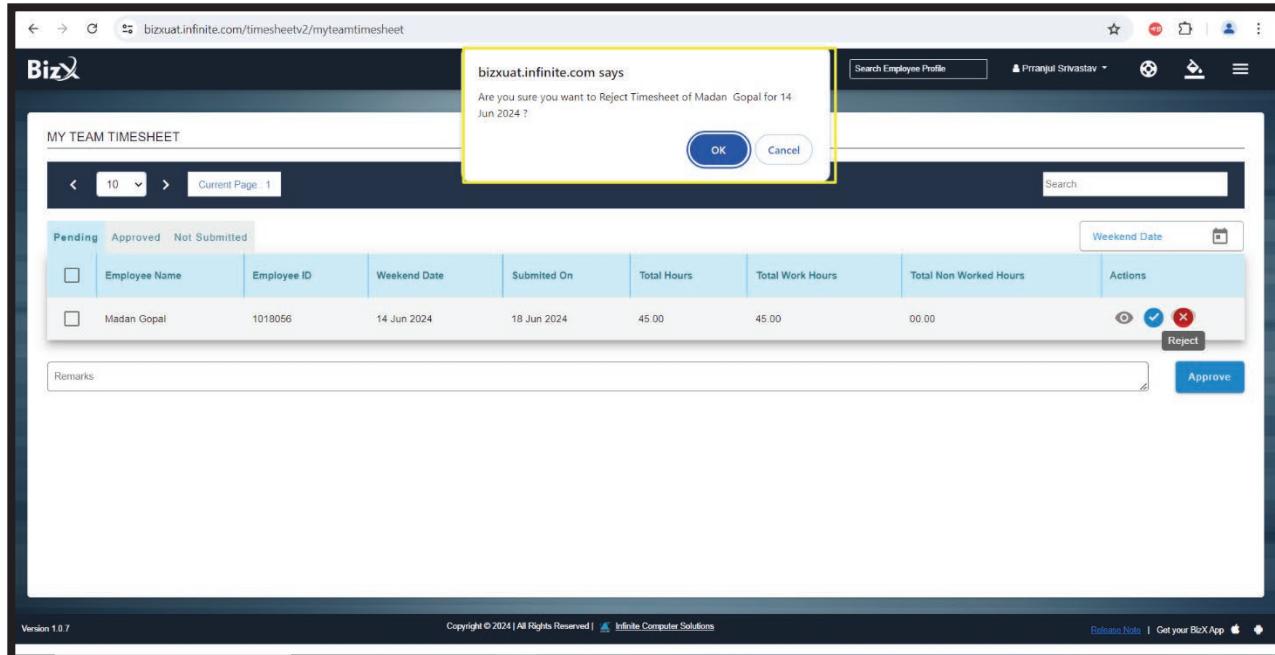
Image 36: Rejection Confirmation Message.

   IV.   Click 'ok', A remarks pop-up will be displayed (see in image 37.)
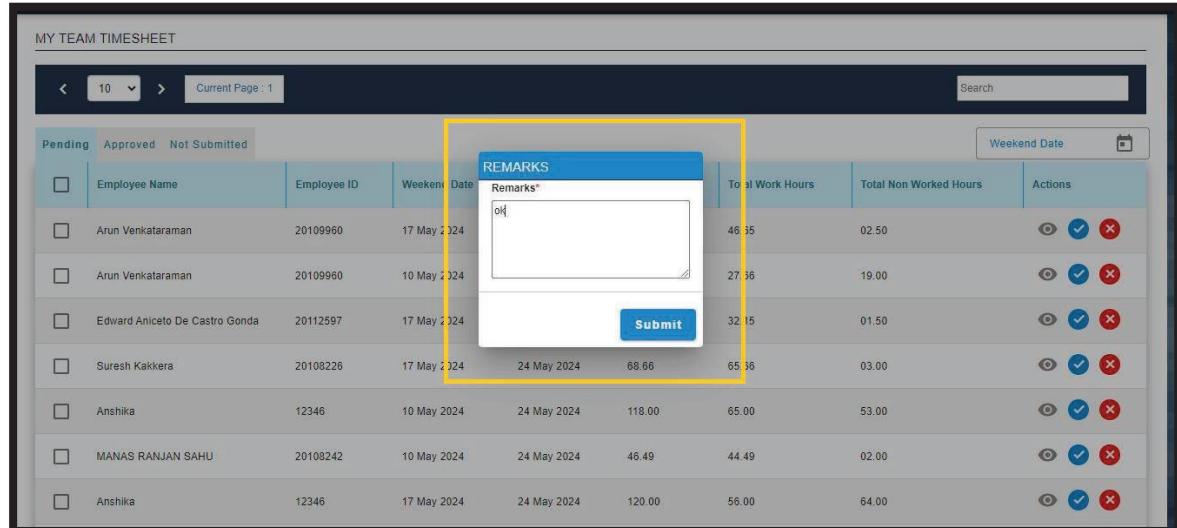
Image 37: Remarks pop-up

    V.   Enter the appropriate remarks and click the 'submit' button to reject the timesheet. A success message will be displayed to the user and auto close after 5 seconds.

2. **Approved tab**: This tab displays all the timesheets which are approved by RM. Once RM approves the timesheet from Pending tab. The approved timesheets will be moved to the approved tab. If RM rejects the timesheet, the timesheet will be available in the 'Not Submitted' tab. (See in Image 38).

Image 38: Approved Tab

3. **Not Submitted** tab: This tab displays the details of the team members who have not submitted their timesheets yet. (See in Image 39.

Image 39 : Not Submitted tab.

Timesheet Unlock by US Timesheet.

Employee view:

1. Employees can submit the timesheet until the pay period is open for submission. After the pay period the timesheet will be locked.

2. Employees can Request for unlocking the timesheet by clicking on the Request Unlock button. (See in image 40).
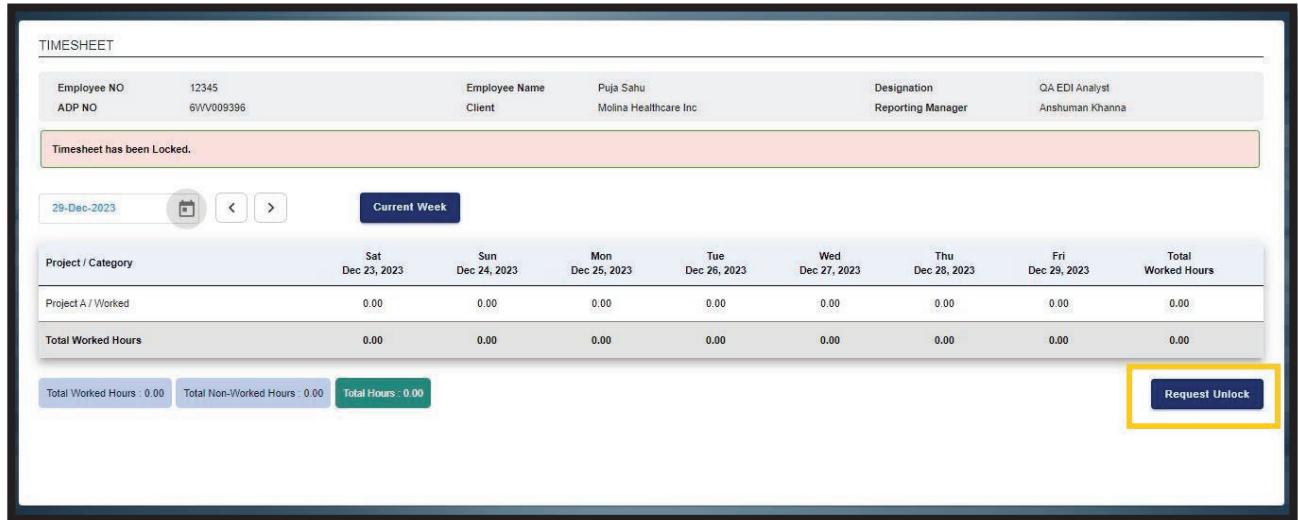
Image 40: Request Unlock

The user can click on the 'Request Unlock' icon to unlock the timesheet. A confirmation message will be displayed (See in image 41)
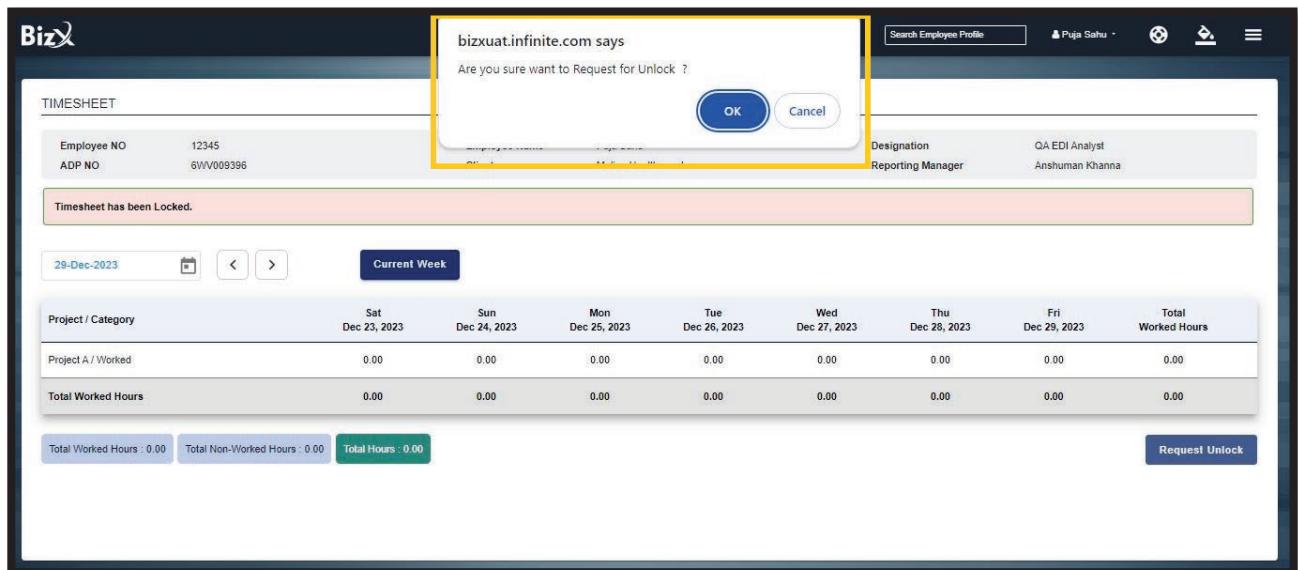
3. A success message will be displayed to the user stating: 'Timesheet Request for unlock Sent Successfully' (see in Image 42.
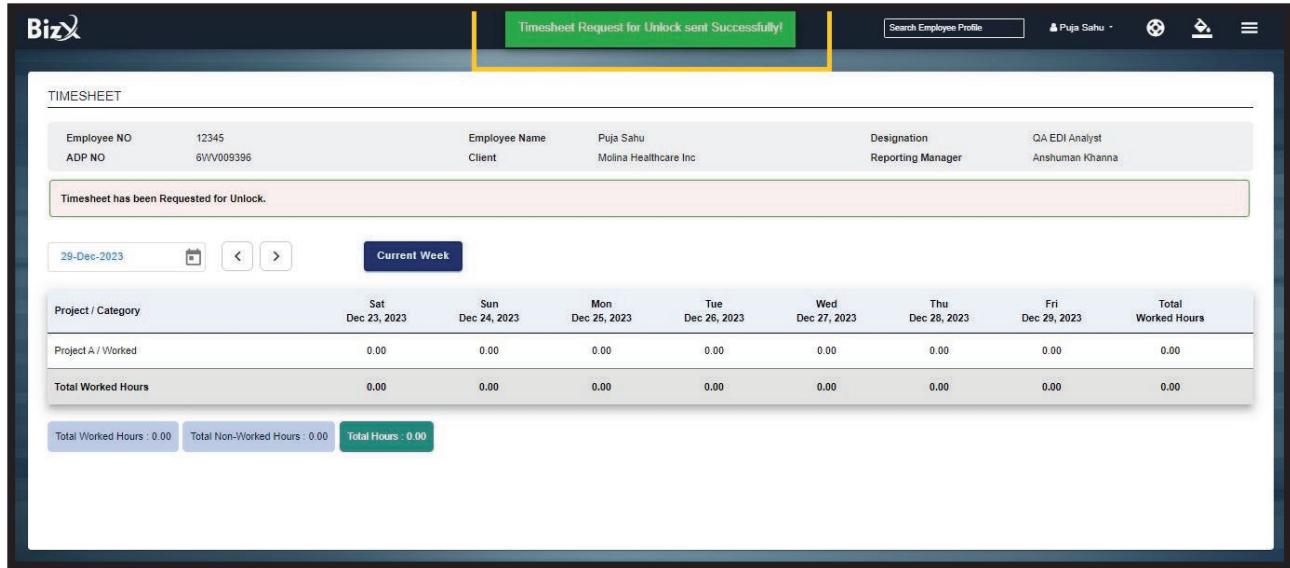
Image 30: Submission Success Message.

4. Timesheet Unlock request will send to the payroll team and they will take the action (Approve or Reject)

Thank you

For more information, please contact: Bizx@infinite.com
Visit us at www.infinite.com