Online Timesheet Manual for Approvers

This manual is a detailed overview for setting up your personal account and approving online timesheets:

1. Setting up your personal account.
2. Approving online timesheets.
3. Querying or rejecting timesheets
4. General queries – who to contact.

1. Setting up your personal account

An online account has been created for you and an email will be sent to you explaining how to activate your login. Please ensure you use your work email address on your account details.

Example email

Dear *Michael,

Below are instructions on how to activate your online account. Once a timesheet has been submitted, you will receive an email notification requesting you to approve/reject the hours with a link taking you directly to the necessary page. Timesheets will need to be approved by 10am Monday.

Your new timesheet login account has been created for your email address: accounts@ocg.co.nz

When you are ready to login for the first time, you need to click on the link below or copy it into a web browser. (You only need to use this link for the first time).

https://timesheets.ocg.co.nz/ResetPassword.aspx?t=CC&EmailAddress=accounts@ocg.co.nz

This will activate your account and email you a temporary password.

Once you receive your temporary password, you will need to login within an **hour** before the temporary password expires. On logging in, you will then be required to reset your password. If the timeframe to change your password has expired, you can click on the above link again to send you another new temporary password, or click on "forgot password".

Once you have reset your password, the link you can use to access online timesheets is:

https://timesheets.ocg.co.nz/Client/ClientLogin.aspx with your email address: accounts@ocg.co.nz

Please find attached the user guide with instructions on how to view, approve or reject timesheets.

If you have any queries, please contact us.

Kind Regards,

When the first link on the above email example is clicked, it will trigger a second email which will be confirmed by the below screen.

Example of screen once the link is clicked

New Password   **Home**

An email has been sent to you at accounts@ocg.co.nz with a temporary password

If you would like to reset your Password, enter your email address below and click the SUBMIT button. We will email you a temporary password which you can use to log in. You will need to change this password.

Note: This email address must be the one used when you registered with OCG.

Your Email Address: [   ]

Submit

This second email you will receive contains your temporary password and a new link.

Example email

Hello *Michael,

You have been issued with a temporary password, which will expire in 1 hour.

The following temporary password is registered to your email address at
https://timesheets.ocg.co.nz/Client/ClientLogin.aspx

- Password: sUmNOd$T6Cyy

Please use this temporary password to log in. You will be requested to change this password before you can continue.

Kind Regards,

Payroll Team

OCG Consulting Limited

After clicking on the link within your email, you will need to enter both your User ID and temporary password and then click on 'Login'.

Example of screen once the link is clicked

You will then be prompted to enter a new password which adheres to certain detailed criteria.

Example of changing password screen

Forgotten ID or Passwords

Should you either forget your UserID or need to reset your password, click on the relevant link within the login screen.

Example Login screen

You will then receive an email with the required details.

2. Approving online timesheets.

When a candidate submits a timesheet, you will be notified by email.

Example email

Hello *Michael

*Bugs *Bunny has submitted an Online Timesheet for authorisation.

Position: 58816 *Sales Support
Pay Period: 10 Jul 2017 to 16 Jul 2017

You can use the link below to log in and authorise the timesheet.

Approve Timesheets

Please approve this timesheet by 1pm Monday.

If you have any queries, please contact us.

Kind Regards,

You can log in by clicking on the link in this email and completing your log in details previously provided.

Once you have logged in, select 'Online Timesheets' to go in and access any timesheets created by your candidate.
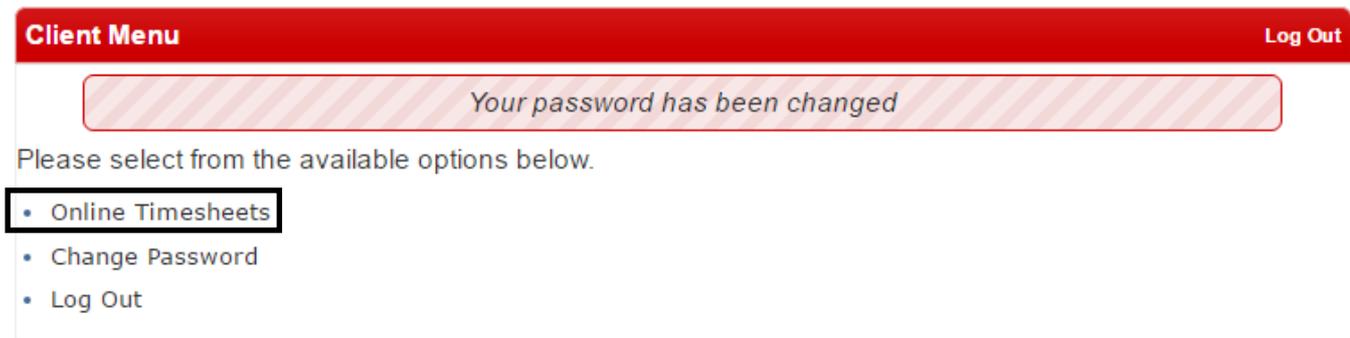
Client Menu   **Log Out**

Your password has been changed

Please select from the available options below.

- Online Timesheets
- Change Password
- Log Out

All the timesheets you have been nominated to authorise will be listed as 'Awaiting Approval'.

Example of online timesheets awaiting approval screen

Approving a timesheet on behalf of another approver

The 'Reporting To' field will default to your name, so, if approving on behalf of another approver use the drop down menu to select the other approver.

Example of screen for amending approvers

Approver for more than one company

If you are an approver for more than one company, you will have the option to select which company to view by using the drop-down menu in the 'Client' field.

Example of screen for amending approvers (multiple companies)

Timesheets			Home	Log Out	?

Contact:	*Michael *Jackson
Client:	*Brad Pitt Holdings Limited* *Julia testing Company
Reporting To:	*Jackson, *Michael ⌄
Comment:	**Timesheets Due By 1pm Monday**

Timesheets

Status: Awaiting Approval ⌄	Name:	Period:	🔳	Search	Clear

ID	Assignment	Assignment Duration	Candidate Name	Pay Period

Click on the timesheet you would like to approve and the hours entered will be displayed.

Example of screen showing hours

Timesheets

Home Log Out ?

Contact:	*Michael *Jackson
Client:	*Julia testing Company
Reporting To:	*Jackson, *Michael
Comment:	Timesheets Due By 1pm Monday

Timesheets

Status: Awaiting Approval   Name: [   ]   Period: [   ]   Search Clear

ID	Assignment	Assignment Duration	Candidate Name	Pay Period
58816	*Sales Support	01 Jul 2017 to 30 Sep 2017	*Bunny, *Bugs	21 Aug to 27 Aug 2017 (45h 00m)
58816	*Sales Support	01 Jul 2017 to 30 Sep 2017	*Bunny, *Bugs	28 Aug to 03 Sep 2017 (36h 00m)
58816	*Sales Support	01 Jul 2017 to 30 Sep 2017	*Bunny, *Bugs	25 Sep to 01 Oct 2017 (11h 00m)
58816	*Sales Support	01 Oct 2017 to 24 Dec 2017	*Bunny, *Bugs	04 Dec to 10 Dec 2017 (15h 00m)
58816	*Sales Support	01 Oct 2017 to 24 Dec 2017	*Bunny, *Bugs	11 Dec to 17 Dec 2017 (17h 30m)
58816	*Sales Support	01 Oct 2017 to 24 Dec 2017	*Bunny, *Bugs	18 Dec to 24 Dec 2017 (34h 00m)

Hours   Print

Day Worked	Rate	Start Time	Finish Time	Lunch Break	Total Hours	Units	Notes
Mon 18 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-
Tue 19 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-
Wed 20 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-
Thu 21 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-

Allowances

Date	Rate	Quantity	Amount	Total	Notes
Mon 18 Dec 2017	Expense Claim	1	$200.00	$200.00	-
Tue 19 Dec 2017	Mileage	207	$0.77	$159.39	-

Totals to be Billed

Total Hours	Total Units To be Billed
34h 00m	34 Hours Worked

Allowances Total Quantity	Total Disbursements to be Billed
208	$359.39

Rates

Different Rates (Hourly, Daily or Weekly)

Please select the appropriate rate for your assignment under the 'Rate' column.

Rate	Pay Rate
Hours Worked	Hourly Rate
Days Worked	Daily Rate
Weeks Worked	Weekly Rate

When you complete your hours worked it will auto calculate the total hours in the 'Hours' column.
If you are on an hourly rate, the 'Units' column will auto calculate the same as 'Hours'. The 'Units' column is locked.
If you are on a daily or weekly rate, the 'Units' column will auto calculate according to the below guide.

Daily

0 - 3 hours	= 0 days
3.25 - 6 hours	= 0.5 days
6.25 – 25 hours	= 1 day

Weekly

0 - 6 hours	= 0.1 Weeks
6 – 24 hours	= 0.2 Weeks

Example showing hourly, daily and weekly rates

Day Worked	Rate	Start Time	Finish Time	Lunch Break	Hours	Units	Notes	Update
Mon 16 Oct 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8.5	8.5 hours	-	
Tue 17 Oct 2017	Days Worked	08:00 AM	05:00 PM	0h 30m	8.5	1 days	-	
Wed 18 Oct 2017	Weeks Worked	08:00 AM	05:00 PM	0h 30m	8.5	0.2 weeks	-	
Thu 19 Oct 2017	Days Worke	08:00 am	05:00 pm	0 h 30 m	8.5	1 days		
Note								

The auto calculated figure under the 'Units' need to the be manually amended (under either the daily or weekly rates), it will be displayed as show below, with the manually calculated number followed by the crossed out auto calculated number.

Example showing manually calculated unit changes.

Day Worked	Rate	Start Time	Finish Time	Lunch Break	Hours	Units	Notes	Update
Mon 20 Nov 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8.5	8.5 hours	-	
Tue 21 Nov 2017	Days Worked	08:00 AM	05:00 PM	0h 30m	8.5	1.5 days 1.0	-	
Wed 22 Nov 2017	Weeks Worked	08:00 AM	05:00 PM	0h 30m	8.5	0.4 weeks 0.2	-	
Thu 23 Nov 2017	Days Worke	08:00 am	05:00 pm	0 h 30 m	8.5	1 days		
Note								

If a candidate has included a note with their timesheet, this can be viewed by clicking the icon

Example of screen with timesheet notes included

					Hours		Print
Day Worked	**Rate**	**Start Time**	**Finish Time**	**Lunch Break**	**Total Hours**	**Notes**	
Mon 11 Sep 2017	Hours Worked	08:00 AM	04:30 PM	0h 30m	8h 00m	-	
Tue 12 Sep 2017	Overtime (1.5)	08:00 AM	11:00 PM	1h 00m	14h 00m	📋	
Wed 13 Sep 2017	Hours Worked	08:00 AM	04:30 PM	0h 30m	8h 00m	-	
Thu 14 Sep 2017	Sick Pay	12:00 AM	12:00 AM	0h 00m	0h 00m	📋	
Fri 15 Sep 2017	Hours Worked	08:00 AM	04:00 PM	0h 30m	7h 30m	-	
Sat 16 Sep 2017	Overtime (1.5)	08:00 AM	12:00 PM	0h 00m	4h 00m	-	

					Hours		Print
Day Worked	**Rate**	**Start Time**	**Finish Time**	**Lunch Break**	**Total Hours**	**Notes**	
Mon 11 Sep 2017	Hours Worked	08:00 AM	04:30 PM	0h 30m	8h 00m	-	
Tue 12 Sep 2017	Overtime (1.5)	08:00 AM	11:00 PM	1h 00m	14h	**Note**	**Close**
Wed 13 Sep 2017	Hours Worked	08:00 AM	04:30 PM	0h 30m	8h	6 hrs overtime at time	
Thu 14 Sep 2017	Sick Pay	12:00 AM	12:00 AM	0h 00m	0h		
Fri 15 Sep 2017	Hours Worked	08:00 AM	04:00 PM	0h 30m	7h 30m	-	
Sat 16 Sep 2017	Overtime (1.5)	08:00 AM	12:00 PM	0h 00m	4h 00m	-	

Provided you are happy to approve the timesheet, tick that you accept the 'Terms and Conditions' at the bottom of the timesheet page and then click on 'OK to submit your approval.

Example of screen to submit approval

Once timesheets are approved, they will move from the 'Awaiting Approval' to 'Approved' status. By using the drop-down menu against 'Status', by selecting 'Approved', and clicking on search, you can then view all approved timesheets.

Example of screen under 'Approved' status

Status desriptions:

Approved = Completed, submitted, approved and awaiting processing
Awaiting Approval = Completed, submitted and awaiting approval
Incomplete = Started but not complete nor submitted
Not started = Avalible to the candidate but not yet started
Processed = payment and invoice processed
Rejected = Completed, submitted, rejected and awaiting candidate to amend and re-submit

To change which timesheets are displayed, change the status accordingly and click on search.

Example showing drop-down menu for timesheet status

3. Querying or rejecting timesheets.

If you would like to query or reject a timesheet, this can be done by selecting 'Reject Timesheet', completing the 'Comment to Candidate' field, and then clicking 'Ok'.

Example of screen rejecting a timesheet

Timesheets   Home   Log Out   ?

Contact:	*Michael *Jackson
Client:	*Julia testing Company
Reporting To:	*Jackson, *Michael
Comment:	Timesheets Due By 1pm Monday

Timesheets

Status: Awaiting Approval   Name: [   ]   Period: [   ]   Search   Clear

ID	Assignment	Assignment Duration	Candidate Name	Pay Period
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Hours   Print

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Wed 20 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-
Thu 21 Dec 2017	Hours Worked	08:00 AM	05:00 PM	0h 30m	8h 30m	8.5 hours	-

Allowances

Date	Rate	Quantity	Amount	Total	Notes
Mon 18 Dec 2017	Expense Claim	1	$200.00	$200.00	-
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Total Hours	Total Units To be Billed
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Health and Safety

Any Health and Safety issues will be followed up by your Consultant.

☐ Yes (Please include a comment)   ☑ No   ☐ If Yes - I have advised my Agent

☐ N/A (Contractors)

Comment:

Comment to Candidate: [You havent completed any hours for Wed]   [Reject Timesheet ▼]   OK   g a

The candidate will receive an email notifying them that their timesheet has been rejected and why. Once the candidate had amended and resubmitted the timesheet, you will receive another email notifying you that a timesheet has been submitted.

Log on to view and approve this modified timesheet.

4. <u>General Queries</u>

Please contact your Consultant for queries relating to:
- Changing approvers

Please contact your candidate for queries relating to:
- Errors with submitted data i.e. incorrect hours or dates

Please contact our accounts team for all other queries accounts@ocg.co.nz