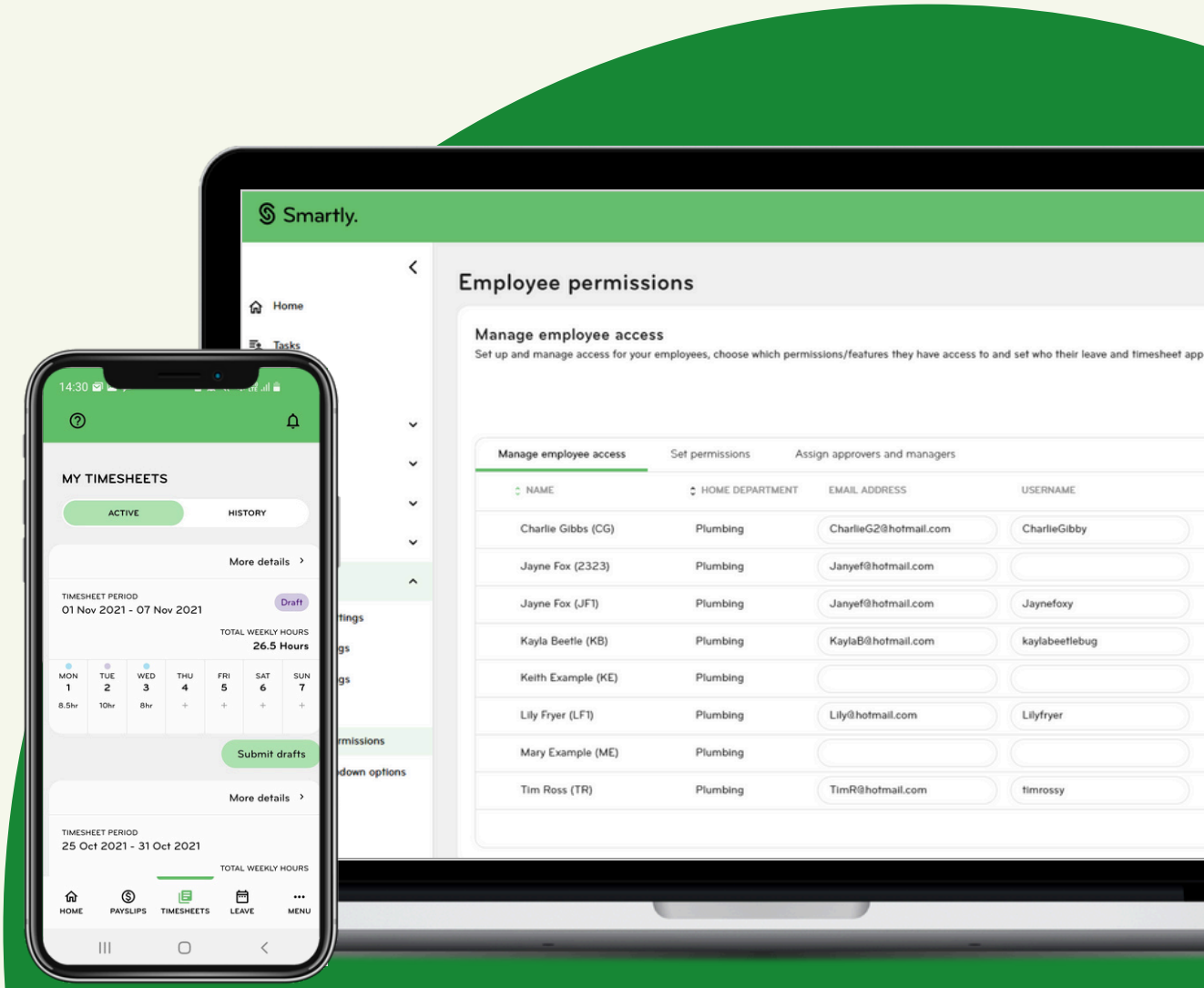
Smartly
Powering your people

Timesheet Smartly.

Ditch the paper timesheets and confidently track and manage your team's hours.



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Flexible time and costs

Managing timesheets shouldn't take a lot of time. Smartly timesheets are straightforward, simple to understand, and easy use.

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Getting started

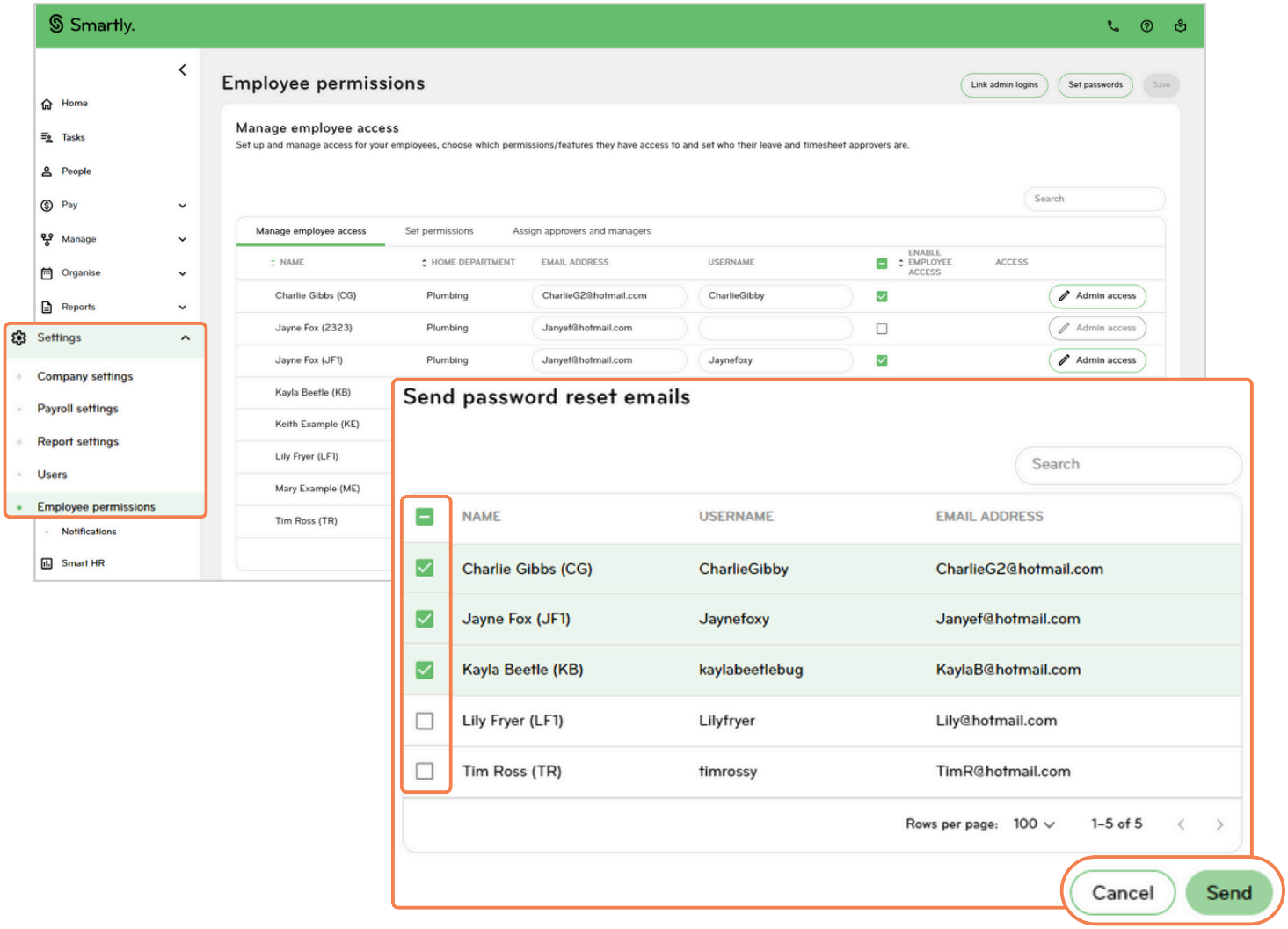
(Settings > Employee permissions)

New to Smartly?

Payroll administrators can easily enable employee access and manage permissions for the whole team from one place. If your employees use the app, they need to be enabled for employee access in your Smartly site. To locate the Employee Permissions screen, go to 'Settings' > 'Employee Permissions'. Here, you'll find your employees' home departments, email addresses, usernames, and their employee access status.

Turning on employee access for employees

1. **Go to 'Settings' > 'Employee permissions'**
2. **Click on 'Set passwords' and tick the employees who will be using the Smartly app for the first time.**
3. **Once selected, click 'Send'. This will automatically send out a password reset email to your employees.**

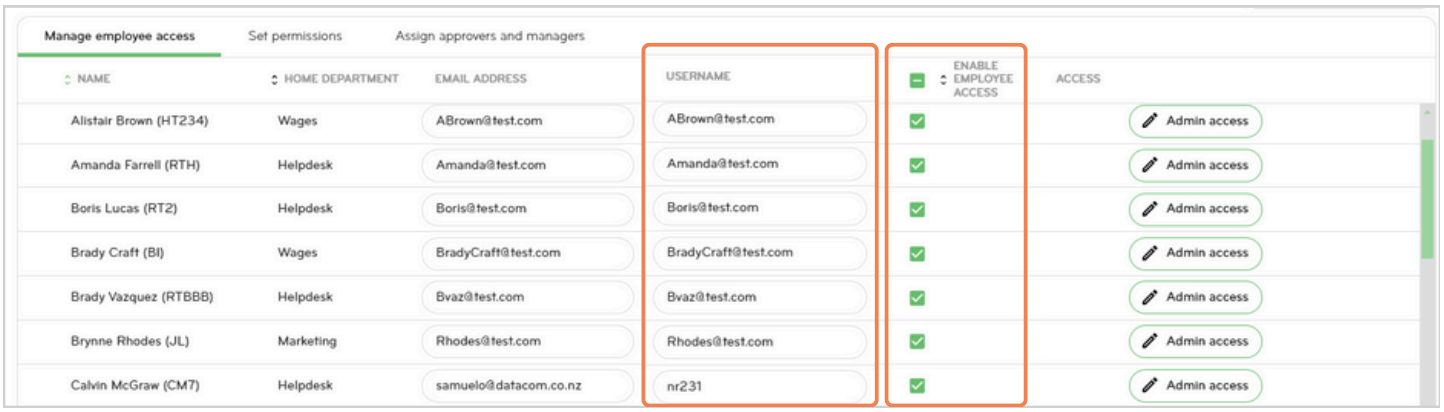


Payroll administrators will need to let their employees know their usernames. To simplify, we recommend using their email address as their username.

Enabling employee permissions

To enable an employee for employee access simply tick the check box, and the system will automatically add their email address as their username to log in to the app (if their username has not already been set). If you want to change the username, delete the default username and enter the new one.

1. **Tick the check box to enable employee access.**
2. **System will automatically add their email address as their username to log in to the app.**



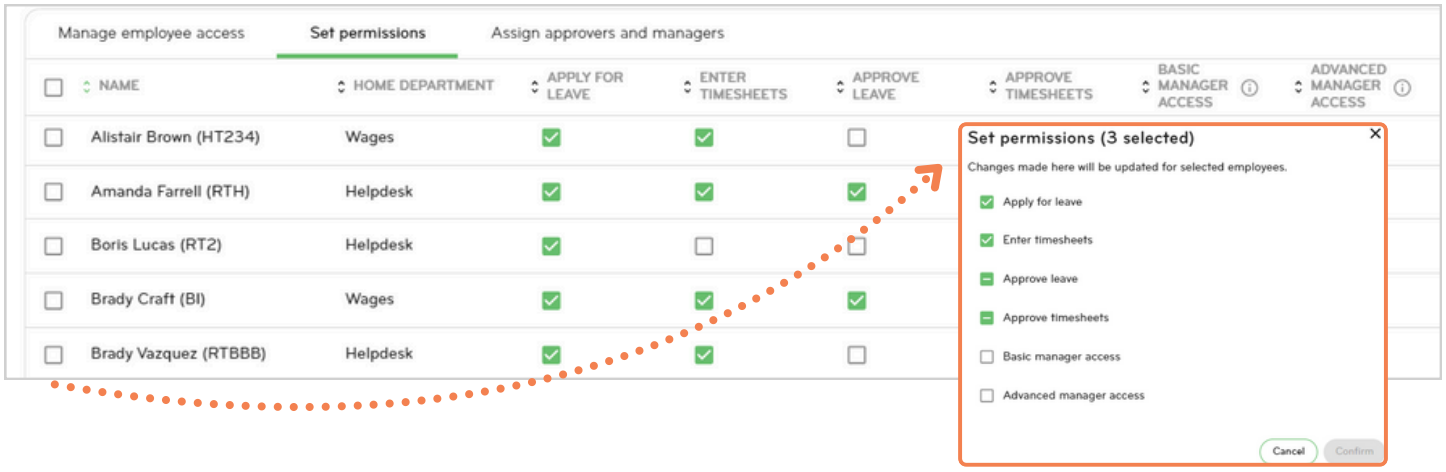
To see which employees haven't been enabled for employee access click on the 'Enable employee access' column sort arrows.

Setting permissions

Once enabled you can set permissions for your employees by selecting the 'Set Permissions' tab. All employees enabled for employee access will have the 'Apply for leave' permission ticked on automatically.

Updating in bulk

If you'd like to update more than one employee at once, tick the check boxes on the far left for the employees you want to edit. Once you've selected the employees, click on the 'Edit' button and a pop-up will appear. Here you can select the permissions you want to give the selected employees. Once done click 'Confirm'.



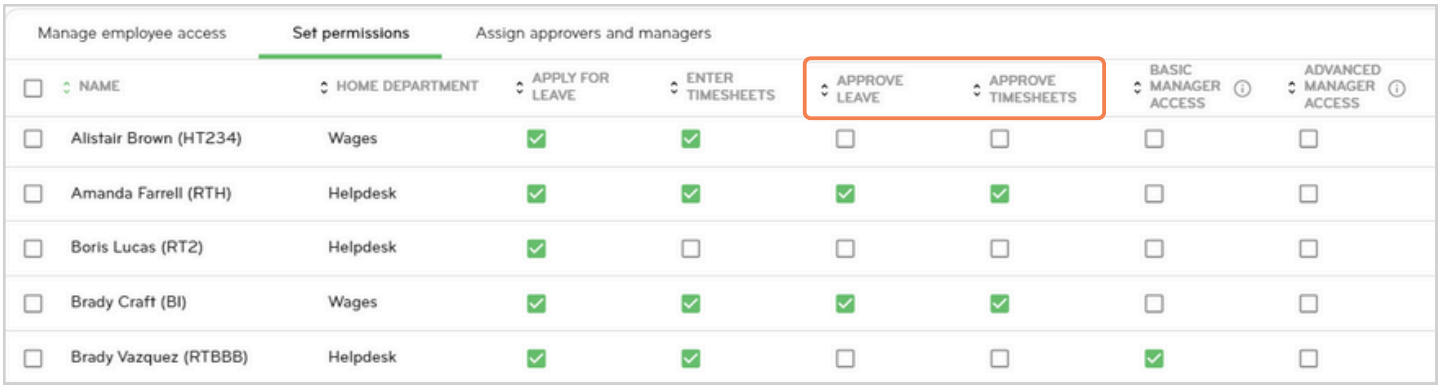
You can easily set permissions for your employees by selecting the checkboxes. Choose which employees you'd like to be able to apply for leave, enter timesheets, approve leave, and approve timesheets.

Assigning approvers

Once you've set the permissions for your team, including choosing who will be able to approve leave and timesheets, you can click on the 'Assign Approvers' tab.

Here you can use the dropdown lists to select the leave and timesheet approver for each employee. The leave and timesheet approver lists will only contain the employees you have set as leave/timesheet approvers on the set permissions tab.

You can set approvers one-by-one, or in bulk.



Updating in bulk

Select a group of employees, then click on the edit button to edit multiple employees at once. Once completed, click 'Confirm'.

Scenario: On some occasions, a manager who approves leave and timesheets may take an extended break.

If you need to update the approver for a whole team all at once, you can sort the 'Leave Approver' column, and see every employee that person is the approver for.

Simply select these employees and update the approver in bulk by clicking the edit button.

Adding hours to pays

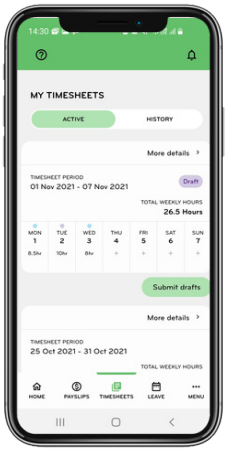
Timesheets via the Smartly app

Hours submitted by employees through the Smartly mobile app automatically feed through to your payroll site. They will show up in the pending tab until they've been approved by either you or their manager.

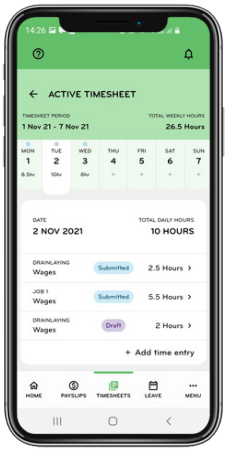
If you have managers reviewing team timesheets, hours will be automatically loaded into the pay packet when they are approved. If hours are declined, the timesheet status will show as declined in the app and the timesheet will be deleted from the payroll site.

See our Smartly app guide for details on using timesheets in the app.

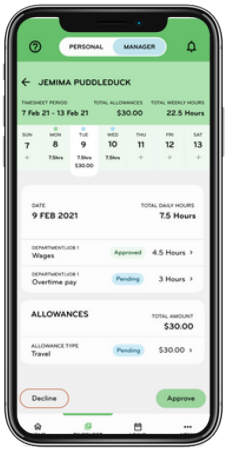
1. Timesheets sync up with an employee's pay period and each timesheet card shows a seven day working week.



2. At a glance employees can see how many hours they've worked and see where in the approval process their timesheets are.



3. If you selected a timesheet approver, their hours will be sent to their manager to review before approving for payroll.



Or if you are approving in the site, you can approve from the pending tab.

Approving and declining timesheets

(Organise > Timesheets)

To view, approve, add or edit employee timesheets, go to ‘Organise’ > ‘Timesheets’.
In this screen, you can sort by the following statuses:

- Submitted - Hours yet to be approved and added to a pay.
- Approved - Timesheets that have already been approved.
- Declined - Hours that have been declined.
- Not submitted - Staff who have not yet submitted their timesheets.

You can also filter by:

- Employee
- Week
- Pay period
- Department
- Pay group

You can approve/decline timesheets for employees by individual day, per week, or in bulk for multiple employees.

Single Day:

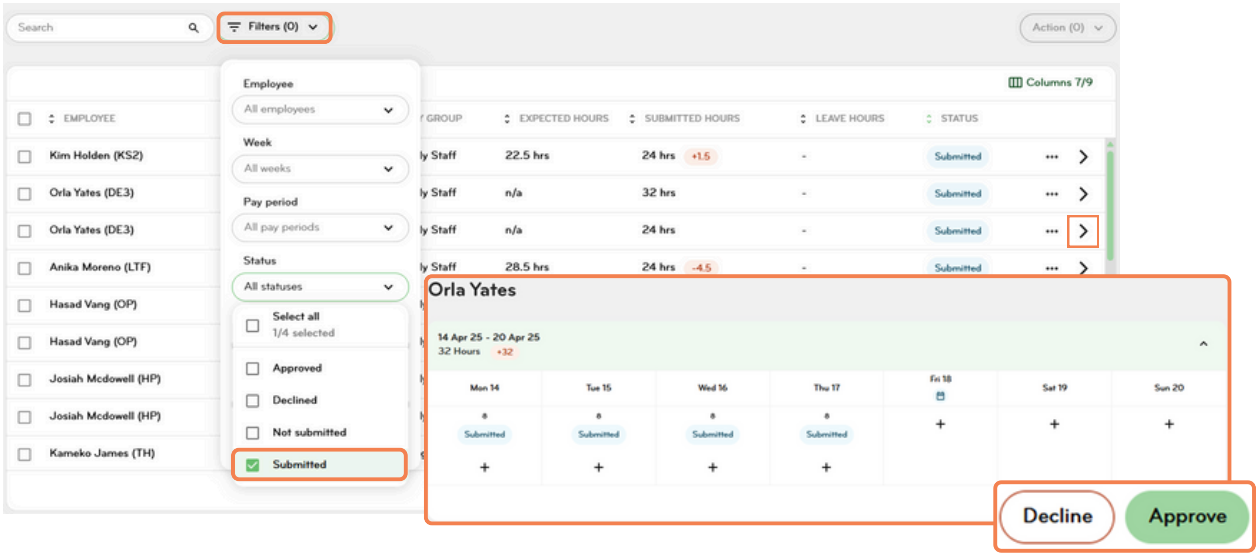
- To approve/decline a single day, click on the submission and click approve/decline.

Single Employee's Week:

- To approve/decline an employee's week, go into their submission and click approve/decline in the bottom right corner.

In Bulk:

- To approve/decline multiple timesheets in bulk, from the table view select each employee who's timesheet you want to approve.
- Once you've selected each employee, click the 3 dots on the right side of the table and either approve/decline.

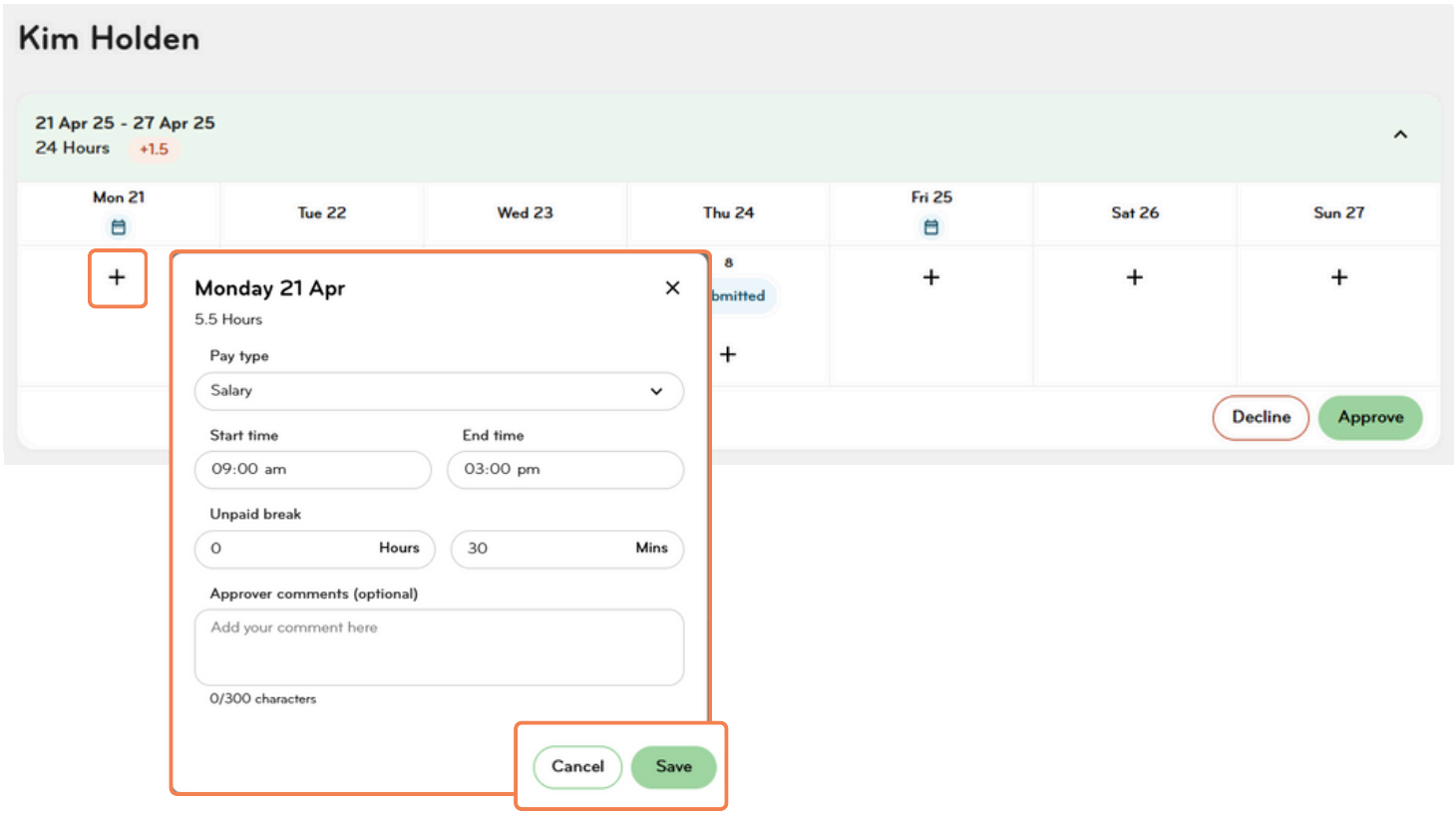


Adding and editing a time entry for an employee

Managers and payroll administrators can easily add time entries for employees in the Smartly website.

Add an entry

1. Select an employee.
2. Click on the plus icon.
3. Select their 'pay type' from the drop down menu.
4. Enter the start time and end time.
5. Enter any unpaid breaks.
6. Add a comment (optional)
7. Click 'save', this automatically approves the hours for pay and shows in the calendar.

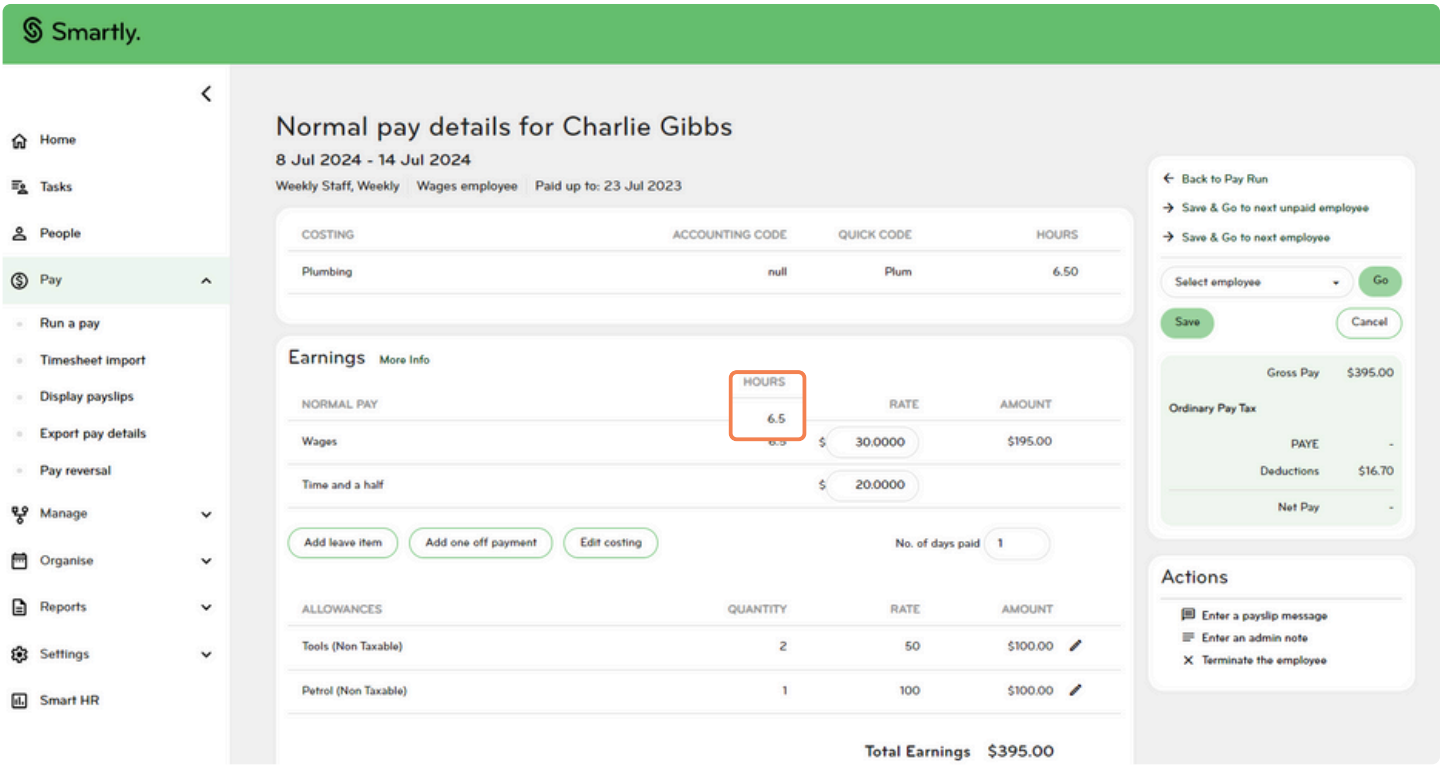


To edit a timesheet entry, click into the entry in the calendar, make your changes and save.

Viewing hours in a pay packet

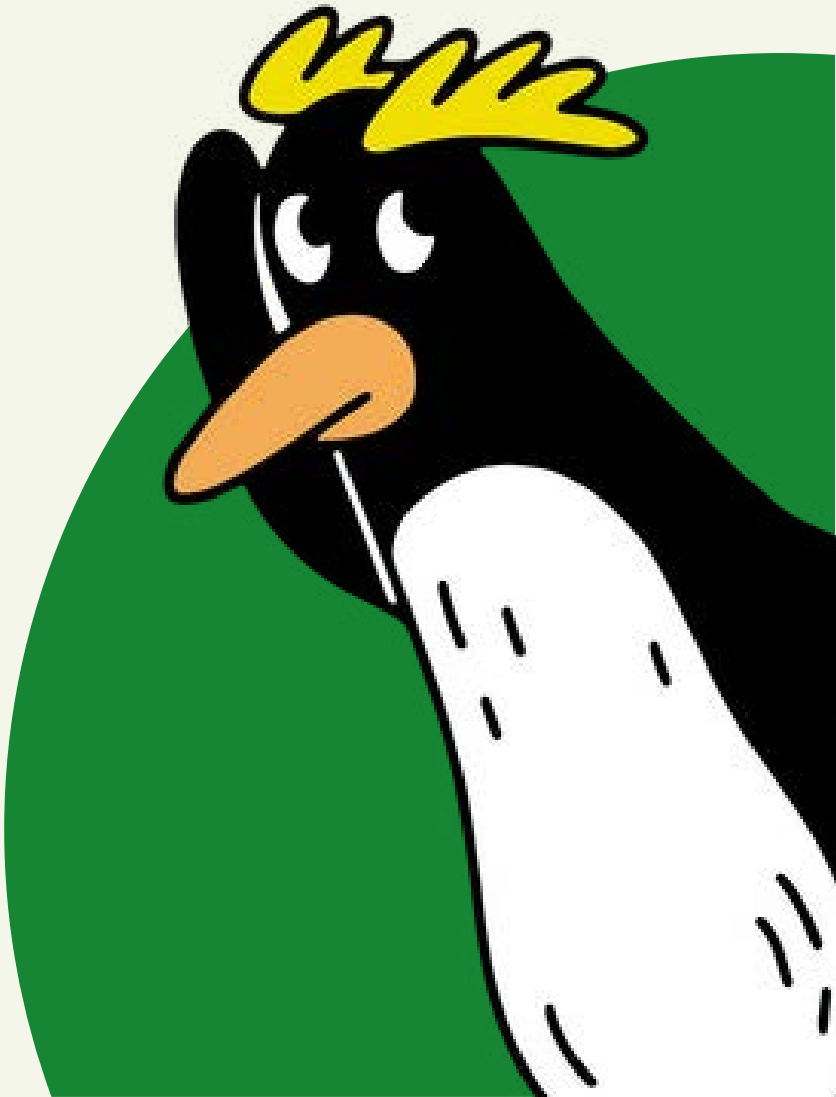
Approved hours will flow straight through to the pay which you can see by clicking ‘Pay’ > ‘Run a pay’ and then double clicking into the employee's name.

Hours submitted by timesheets, cannot be edited in the pay packet. The payroll administrator or manager will need to edit in the timesheet tab and re-save.



We're here to help

Whether you're after some information, or you've got something niggly or urgent that you want to chat through with an expert – we've got you! Our customer support team can be reached on 0800 10 10 38, Monday to Friday, excluding public holidays.



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