

WESTERN SYDNEY
UNIVERSITY



Staff nLine

ALESCO HRMIS V13

VERSION 1.0

TIMESHEET UNIT CHECK SNAPSHOT GUIDE

August 2015

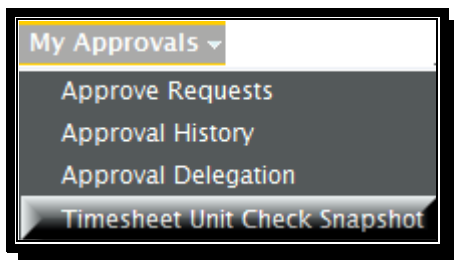
HR Systems
Office of People and Culture

Timesheet Unit Check Snapshot

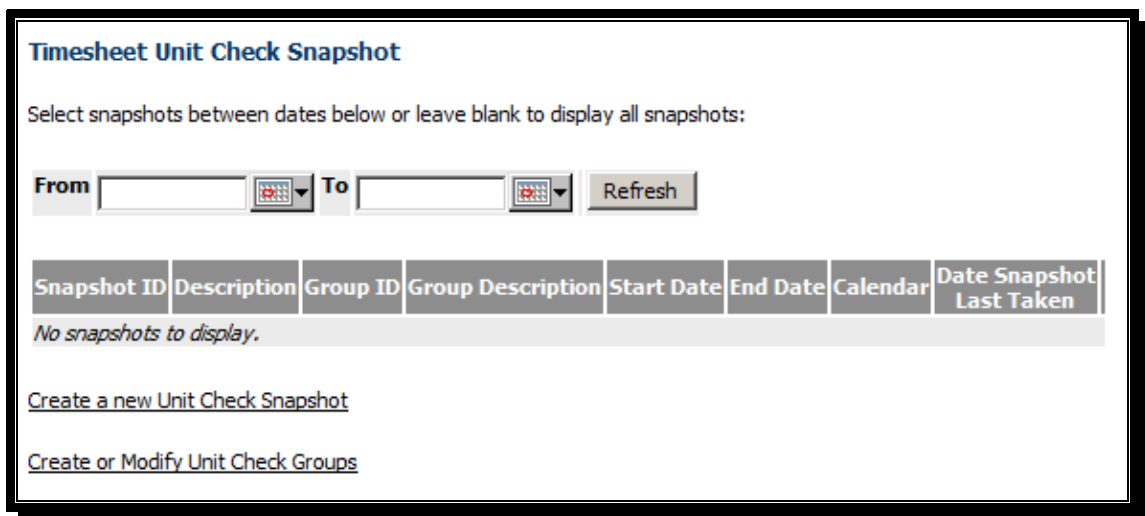
The Timesheet Unit Check Snapshot is a management tool designed to monitor, the timesheet units submitted by an employee, for a specified period, against estimates defined by the supervisor. The system will issue warnings when the demarcated levels are reached but will not prevent or restrict the further submitting of timesheets.

This functionality is available to all users with team leader access and has casual staff reporting to them.

Timesheet Unit check snapshot is located on the "My Approvals" menu.



Once you select "Timesheet Unit Check Snapshot" from the "My Approvals" menu, the following screen will be displayed.

A screenshot of the "Timesheet Unit Check Snapshot" web page. The page has a title "Timesheet Unit Check Snapshot" in blue. Below the title, there is a text prompt: "Select snapshots between dates below or leave blank to display all snapshots:". Below this prompt, there are two input fields labeled "From" and "To", each with a calendar icon to its right. To the right of these fields is a "Refresh" button. Below the input fields, there is a table with the following headers: "Snapshot ID", "Description", "Group ID", "Group Description", "Start Date", "End Date", "Calendar", and "Date Snapshot Last Taken". Below the table headers, there is a message: "No snapshots to display." Below the message, there are two links: "Create a new Unit Check Snapshot" and "Create or Modify Unit Check Groups".

There are two main stages in setting up a Time sheet Unit Check Snapshot - they are

- Creating Unit Check Groups, and
- Defining a Unit Check Snapshot

Unit Check Groups

When you access the Timesheet Unit Check snapshot menu, you could view snapshot records previously created. To restrict the snapshot display to those spanning particular date range, enter the relevant dates in the **From** and **To** fields and click on the refresh button.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Guidance Text

Select snapshots between dates below or leave blank to display all snapshots:

From  To 

Snapshot ID	Description	Group ID	Group Description	Start Date	End Date	Calendar	Date Snapshot Last Taken	
2	HRIS Team 2	2	HRIS Snapshot	01-MAY-2009	31-DEC-2009		23-SEP-2009	Update Snapshot

[Create a new Unit Check Snapshot](#)

[Create or Modify Unit Check Groups](#)

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To create or modify a Unit Check Group, click on the "Create or Modify Unit Check Groups" link. The following screen will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

New Unit Check Group

Group ID: 26
Group Description:
Group Selection Type:

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- | | |
|-----------------------------|---|
| Group Description | Enter an appropriate description for the Group |
| Group Selection Type | All employees from Team list with option to exclude particular employees |
| | List of select employees/jobs |
| | All employees with specific occupancy attributes such as Clevel, Award, Classification or Employment Status |

The Unit Check Group operates on a team leader's current team list where their employment status is that of a Casual.

To create a Unit Check Group direct from the Team List, select Group Selection Type of "Direct from Team List". The following screen will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

New Unit Check Group: 25 TeamList

Choose employees to Exclude from the group by checking the box in the exclude column.

Instruction Text

Person Id	Job No	Name	Position No	Position title	Clevel Description	Exclude
30026000	03	DAWSON, Mr SAMPSON LESLIE	7004376	CASUAL ACADEMIC - HRIS	Information Services	<input checked="" type="checkbox"/>
30026007	01	NASH, Miss Samantha	7004375	CASUAL GENERAL - Info Services	Information Services	<input type="checkbox"/>
30026002	01	LESTER, Mr Bryan	7004375	CASUAL GENERAL - Info Services	Information Services	<input type="checkbox"/>

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You can select all, exclude some, or if you have an extensive list and wish to select only a few, you have the option of excluding all and then selecting a few.

When all required employees are selected, click on the "Next" button.
To complete, click the "Finish" button. To make changes, click the "Back" button.

To specify a Unit Check Group based on specific employee/jobs, select Group Selection Type of "By Employee Number", click on the "Next" button and the following screen will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

New Unit Check Group: 27 EmployeeNum

Choose employees to include in the group.

You may type in the employee number and job or use the list of values

Person Id	Job No Name	Position title
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Back Next Cancel Add Rows

When you click on the "Person ID" drop down box, a list of employees with their job #s are displayed from the Team list. Make your selection and enter the job # if not already populated.

List Of Values: Employee Number

% Find Close

EMPLOYEE NUMBER	JOB NUMBER	NAME	POSITION
30026000	03	DAWSON, Mr SAMPSON LESLIE	CASUAL ACADEMIC - HRIS
30026002	01	LESTER, Mr Bryan	CASUAL GENERAL - Info Services
30026007	01	NASH, Miss Samantha	CASUAL GENERAL - Info Services

When all required employees are selected, click on the "Next" button. To complete, click the "Finish" button. To make changes, click the "Back" button.

To specify a Unit Check Group based on an employee profile, select Group Selection Type of "Employee profile" and click the "Next" button. The following screen will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

To create the profile, click on one of the links below.

Select by Clevel
 Select by Award
 Select by Classification
 Select by Employee Status

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Click on the appropriate radio button to group by Clevel, award, classification or employment status and then click on the "Next" button. The following screens will be displayed.

By Clevel (Organisational Unit)

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Unit Check Group: 44 Academic Group

Choose Company Levels.
You may type in the clevel code or use the list of values

C Level	Description

By Award

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Unit Check Group: 30 GenStaff

Choose awards.

You may type in the award code or use the list of values

Award	Description
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

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By Classification

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Unit Check Group: 45 Snapshot by by Classification

Choose classifications.

You may type in the classification code or use the list of values

Classification	Description
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

By Employment status

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Unit Check Group: 33 Gen Staff

Choose employee status.

You may type in the employee status code or use the list of values

Employee Status	Description
CASGO	Casual General - OnLine Timesheets

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When all required criteria are identified, click on the "Next" button.
To complete, click the "Finish" button. To make changes, click the "Back" button.

The Unit check group can be edited in the same way as when first entering the unit check group criteria except the Group Selection type cannot be changed.

Unit Check Snapshot definition

To Create a Unit Check Snapshot click on the "Create a new Unit Check Snapshot" link, as illustrated below.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Guidance Text

Select snapshots between dates below or leave blank to display all snapshots:

From To Refresh

Snapshot ID	Description	Group ID	Group Description	Start Date	End Date	Calendar	Date Snapshot Last Taken	
2	HRIS Team 2	2	HRIS Snapshot	01-MAY-2009	31-DEC-2009		23-SEP-2009	Update Snapshot

[Create a new Unit Check Snapshot](#)

[Create or Modify Unit Check Groups](#)

The following screen will appear.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot ID: 25

Snapshot Description:

Unit Check Group: HRIS Snapshot

Start Date:

End Date:

Calendar:

Group By:

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Snapshot Description

Enter an appropriate description for the unit check snapshot

Unit Check Group

Select the relevant unit check group from the drop down list provided to identify the group of employees for whom their timesheets required to be tallied in this snapshot.

Start Date

Enter or select date from which timesheet entries, are to be tallied.

End Date

Enter or select date to which timesheet entries are to be tallied.

**Calendar
Group By**

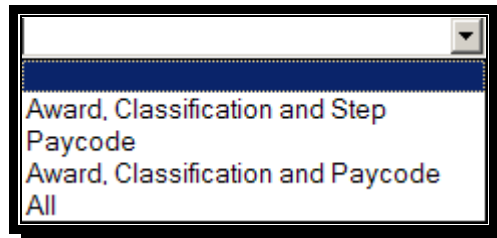
Select the required calendar from the dropdown box.
Select the relevant method of grouping employee timesheet entries within the unit check snapshot from the available options.

Total timesheet entries by selected *award, classification and step* (agreed rate)

Total timesheet entries by selected *paycodes*.

Total timesheet entries by selected *award, classification and step* (agreed rate), and *paycodes*

All - Total timesheet entries.



Enter the required details and click on the "Next" button.

A screenshot of a web form titled "Timesheet Unit Check Snapshot". At the top, it displays "Person: M9100362, Ms JENNIE RICHARDSON" and "Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)". The form contains several fields: "Snapshot ID" (25), "Snapshot Description" (snap shot list), "Unit Check Group" (HRIS Snapshot), "Start Date" (01-Sep-2009), "End Date" (17-Nov-2009), "Calendar" (ACAD - Academic Calendar), and "Group By" (Paycode). The "Group By" field is circled in red. At the bottom left, there are two buttons: "Next" and "Cancel". The "Next" button is also circled in red.

To specify a Unit Check Snapshot grouping on paycode, select Group by "Paycode", and click the "Next" button.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot: 25 snap shot list

Choose Paycodes to be displayed for each employee/job in the snapshot.
You may type in the codes or use the list of values

Delete	Paycode	Description
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
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<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Select one or more Paycodes from the list provided.
The Description will be populated on selection of the paycode.

To specify a Unit Check Snapshot **without** a **grouping** select Group by "All", and click the "Next" button. The following screen will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot: 26 snap shot list

You have selected to group snapshot details by ALL. ie group Snapshot by emp and job. No further criteria needs to be selected.

Proceed to Finish.

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When all required criteria are entered, click the "Finish" button and the following screen will be displayed

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Success! Snapshot created

Snapshot ID	26
Snapshot Description	snap shot list
Unit Check Group	2
Start Date	01-Sep-2009
End Date	17-Nov-2009
Calendar	ACAD

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To view the new snapshot, click "Timesheet Unit Check Snapshot" on the menu

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Guidance Text
 Select snapshots between dates below or leave blank to display all snapshots:

From To Refresh

Snapshot ID	Description	Group ID	Group Description	Start Date	End Date	Calendar	Date Snapshot Last Taken	
26	snap shot list	2	HRIS Snapshot	01-SEP-2009	17-NOV-2009	Academic Calendar		Update Snapshot
2	HRIS Team	2	HRIS Snapshot	01-MAY-2009	31-DEC-2009		23-SEP-2009	Update Snapshot

[Create a new Unit Check Snapshot](#)
[Create or Modify Unit Check Groups](#)

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To edit an existing Unit Check Snapshot definition, click on the "Snapshot ID" link and the following page will be displayed.

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot ID	26
Snapshot Description	<input type="text" value="snap shot list"/>
Unit Check Group	HRIS Snapshot
Start Date	<input type="text" value="01-SEP-2009"/>
End Date	<input type="text" value="17-NOV-2009"/>
Calendar	<input type="text" value="ACAD - Academic Calendar"/>
Group By	<input type="text" value="All"/>

Next Cancel Delete

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The unit check snapshot definition can be edited in the same way as when first entering the unit check snapshot criteria. However, if the snapshot has had estimates or warning amounts recorded against it, the 'Group by' cannot be changed.

View/Edit a Snapshot

To View or edit the snapshot, click on the "Update Snapshot" link. The following screen will be displayed

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot: 26 - snap shot list
 Start Date: 01-SEP-2009
 End Date: 17-NOV-2009
 Calendar: ACAD - Academic Calendar Dates: From 01-Jan-1950 to 31-Dec-2049

Only display entries that have estimates

Please note that the Approval Numbers are current as on date
 Message2
 Message3

Employee#	Name#	Job#	Approval Number	Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
30026002	LESTER, Mr Bryan	01	018PAY			6	0	0	6	
30026007	NASH, Miss Samantha	01	PAY/1209,PAY/1211			0	0	0	0	
Totals for Clevel				Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
U21EBA	Information Services				6	0	0	6		
Totals for Snapshot				Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
					6	0	0	6		

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The unit check snapshot displays the timesheet amounts grouped as specified in the snapshot definition. The entered timesheet values are tallied by submitted, approved and approved and paid values. The actual value is the sum of all these. The unit check snapshot **does not** include un-submitted timesheet values.

Unit Check Estimates.

The unit check snapshot also allows for entry of estimated amounts against individual employees in the unit check group, according to the groupings as specified in the snapshot definition. This allows the comparison of budgeted against actual values.

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Snapshot: 26 - snap
 Start Date: 01-SEP-2009
 End Date: 17-NOV-2009
 Calendar: ACAD - Academic Calendar Dates: From 01-Jan-1950 to 31-Dec-2049

Only display entries that have estimates

Please note that the Approval Numbers are current as on date
 Message2
 Message3

Employee#	Name#	Job#	Approval Number	Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
30026002	LESTER, Mr Bryan	01	018PAY	75	50	6	0	0	6	
30026007	NASH, Miss Samantha	01	PAY/1209,PAY/1211	90	80	0	0	0	0	
Totals for Clevel				Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
U21EBA Information Services					6	0	0	6		
Totals for Snapshot				Estimate	Warning	Submitted	Approved	Paid	Actuals	Remainder
					6	0	0	6		

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You can enter values against the **Estimate** and **Warning** cells.

In the **Estimate** cell, enter the unit/hours expected in the snapshot period for the relevant classification.

In the **Warning** cell, enter the hours/units in the snapshot period for the relevant classification after which you would like to receive email warnings.

To record estimate and warning values, enter the values and save the form.

To confirm that your snapshot has been successfully created, you will see the following.

Person: M9100362, Ms JENNIE RICHARDSON
 Job: 01, SYSTEMS ADMINISTRATOR (BUSINESS)

Timesheet Unit Check Snapshot

Success! Snapshot Saved

Snapshot ID	26
Snapshot Description	snap
Unit Check Group	2
Start Date	01-SEP-2009
End Date	17-NOV-2009
Calendar	ACAD

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To view the updated snapshot, click "Timesheet Unit Check Snapshot" on the menu and then click the "Update Snapshot link".