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# Time & Labor Management with SaaShr


Manager User Guide – Desktop

## SaaShr

G&A Partners' Time and Labor Management (TLM) system is powered by SaaShr, a best-in-class time and attendance system developed by UKG, an industry leader in time-tracking technology.

## About this guide

The Table of Contents below is hyperlinked so that you can click on a topic and advance to the first page of that job aid for faster navigation. Section Headers have been added to clearly identify how the job aids are categorized and include a brief introduction to each of the sections.

 The Note icon alerts you to information to be aware of.

 The Lightbulb icon alerts you to tips/suggestions.



# Table of Contents

This guide provides managers with information they need to know to start using SaaShr’s time and labor management functions on its desktop application, including:

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**Disclaimer**

The technology features available to each client are based on its G&A Partners service agreement. You may not be able to access or view all options listed within this user guide. Please contact your system administrator if you have any questions about the TLM features available to your organization. In addition, this user guide is written from the perspective of a default manager with administrative access. If your personal account security level/access settings are different than that of a default manager, you may not be able to see or access all of the information or options described within this guide.



# G&A IT Systems Overview

G&A uses many IT systems and although each system is different, they all work together to service you, our client, with WorkSight proprietary software serving as the nucleus for all these systems.



**WorkSight** is a Single Sign On (SSO) into multiple all G&A's IT systems. SSO is an authentication method that enables you to securely login to WorkSight and have access to all G&A's systems you have contracted to use without the need to login to each one separately.

**Click Boarding** is the system used to complete employment forms and acknowledge company policies.

**PrismHR** is a complete platform to help efficiently manage payroll, benefits, and HR.

**SaaShr** is a comprehensive time and labor management system that addresses your time tracking and absence management needs.

**Cornerstone** is our online employee development platform designed to help set, manage, and meet your professional goals and empower you to perform at your highest level.

**Slavic 401K** is a 401K recordkeeper and third-party administrator in the PEO multiple employer (MEP) space.

**HiringThing** is an applicant tracking system used for all phases of online recruiting.

**Client Space** is a customer relationship management (CRM) system that provides a way to document interactions with internal and external clients and solve problems in real time.





## WorkSight

WorkSight is a Single Sign On (SSO) into all G&A Partners' IT systems. SSO is an authentication method that enables you to securely login to WorkSight and have access to all G&A's systems you have contracted to use without the need to login to each one separately.

In WorkSight there are two clearly defined roles:

- **Work site Employee** – An employee with access to manage their personal information, i.e., address, paystub, work time, time off, etc.
- **Manager** – A manager role is responsible for the work time and time off for employees reporting to them.

From accessing WorkSight to navigating and understanding the icons, this chapter provides information to help you get started within WorkSight, including:

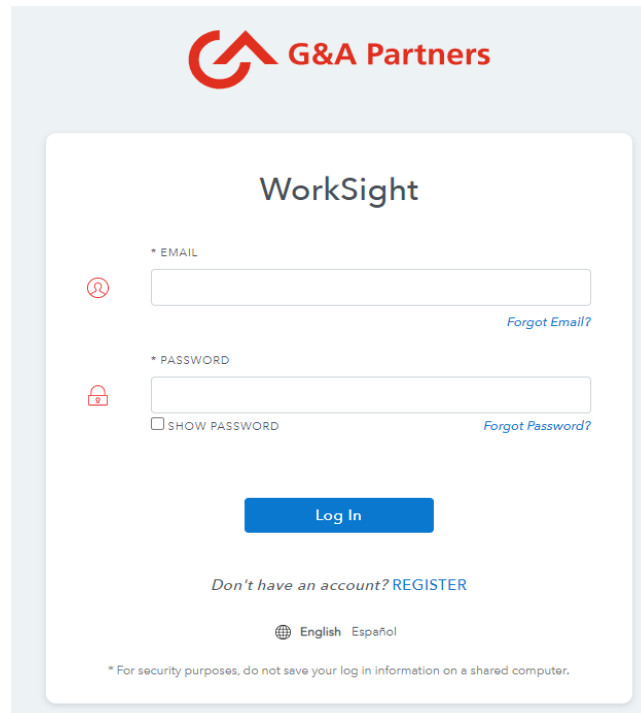
- Logging In to WorkSight
- WorkSight Dashboard
- Logging out of WorkSight



## Logging In to WorkSight

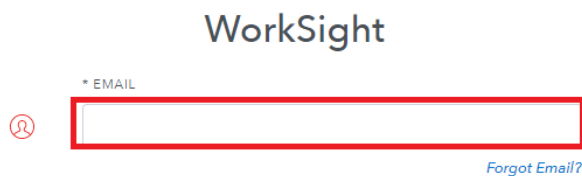
Follow the steps below to log into WorkSight.

1. Click on the URL: <https://worksight2.gnapartners.com/login> and the WorkSight Login page will display.



The screenshot shows the WorkSight login page. At the top, there is the G&A Partners logo. Below it, the word "WorkSight" is centered. There are two input fields: one for "EMAIL" with a red padlock icon to its left and a "Forgot Email?" link to its right; and one for "PASSWORD" with a red padlock icon to its left, a "SHOW PASSWORD" checkbox below it, and a "Forgot Password?" link to its right. A blue "Log In" button is centered below the fields. At the bottom, there is a link "Don't have an account? REGISTER" and language options "English" and "Español". A security note at the very bottom reads: "\* For security purposes, do not save your log in information on a shared computer."


2. Enter the email address assigned to your G&A Partners account in the Email field.



This image is a close-up of the "EMAIL" field from the screenshot above. The field is highlighted with a red border. To the left of the field is a red padlock icon. To the right is a "Forgot Email?" link.

3. Enter your Password in the Password field.



 \* PASSWORD


SHOW PASSWORD [Forgot Password?](#)


**Log In**

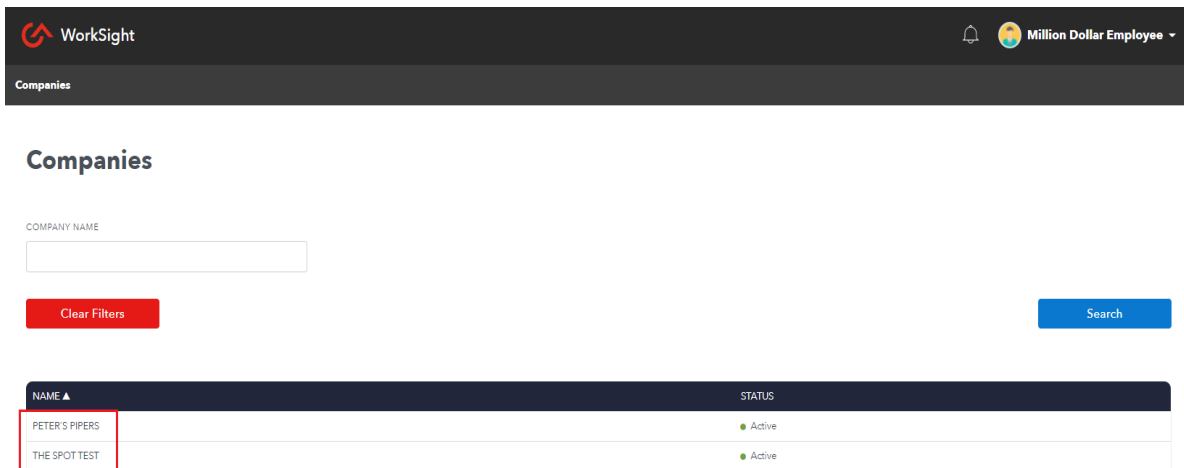
4. Click the Log In button.

**Log In**

*Don't have an account?* [REGISTER](#)


 [English](#) [Español](#)

 If you are granted access to multiple accounts, the WorkSight Client page will display. Click on the company name from the list to access the selected company's WorkSight dashboard.

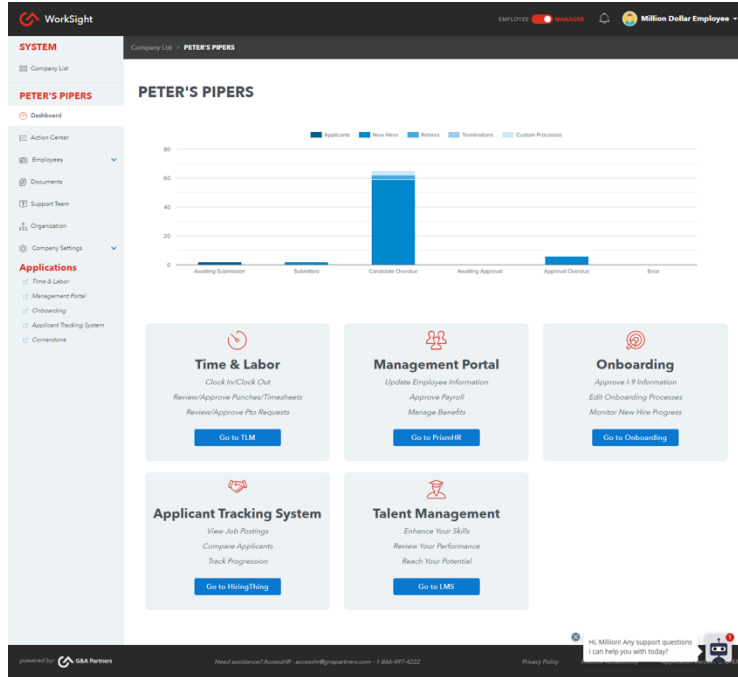


The screenshot shows the WorkSight Client interface. At the top, there is a navigation bar with the WorkSight logo and a user profile labeled "Million Dollar Employee". Below this is a "Companies" section with a search bar and a "Search" button. A table lists two companies: "PETER'S PIPERS" and "THE SPOT TEST", both with a status of "Active". The "PETER'S PIPERS" row is highlighted with a red box.

NAME ▲	STATUS
PETER'S PIPERS	Active
THE SPOT TEST	Active

 If you are granted access to one account, the WorkSight Dashboard will display.





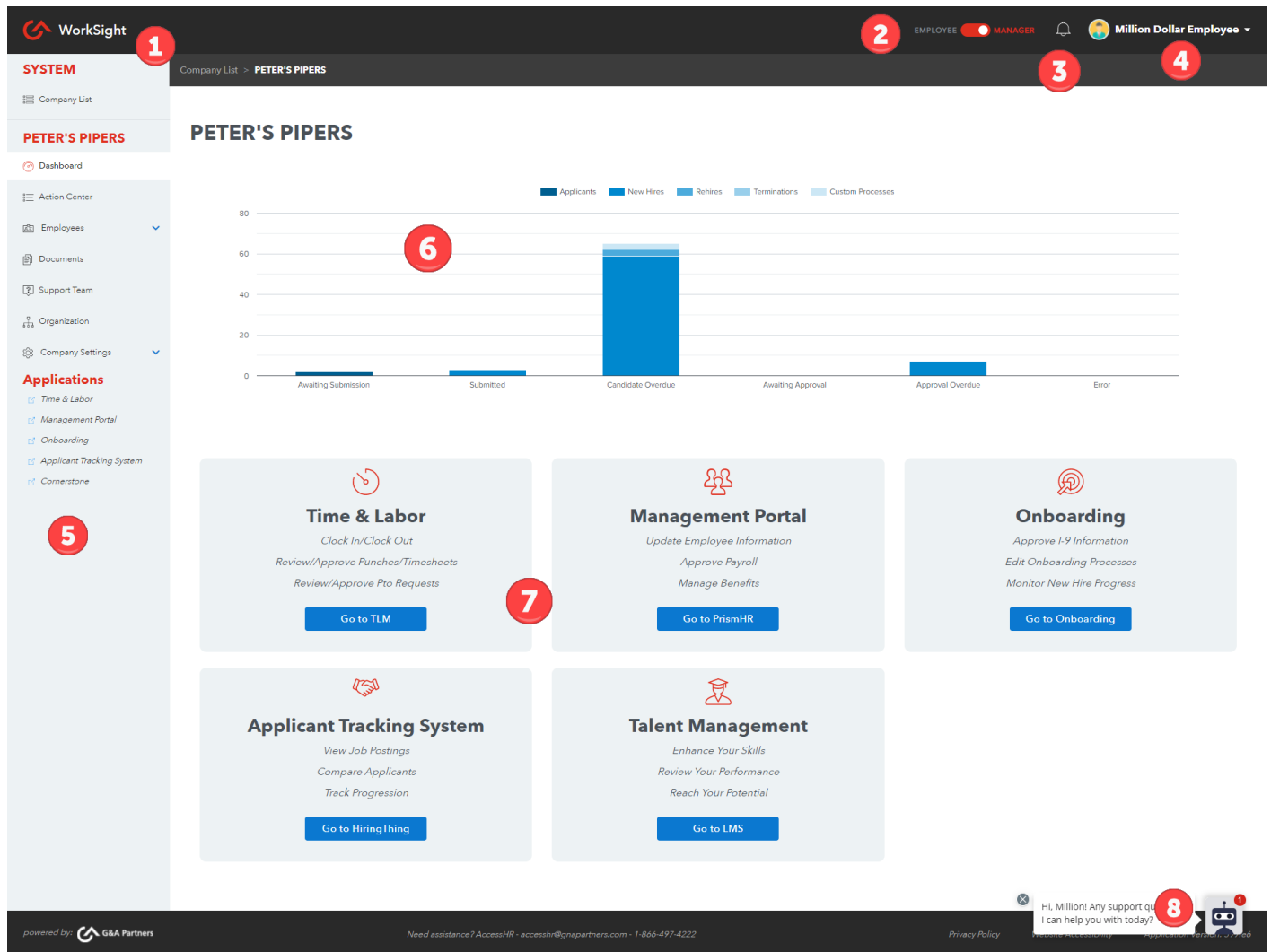
The screenshot shows the WorkSight HR dashboard for 'PETER'S PIPERS'. The top navigation bar includes 'WorkSight', 'EMPLOYEES', 'MANAGER', and 'Million Dollar Employee'. The left sidebar lists various system modules like 'SYSTEM', 'Company List', 'Dashboard', 'Action Center', 'Employees', 'Documents', 'Support Team', 'Organization', 'Company Settings', and 'Applications'. The main content area is titled 'PETER'S PIPERS' and features a bar chart showing the status of applications. Below the chart are five interactive cards for 'Time & Labor', 'Management Portal', 'Onboarding', 'Applicant Tracking System', and 'Talent Management', each with a 'Go to' button. A footer contains contact information and a support chat widget.

Application Status	Count
Awaiting Submission	~2
Submitted	~2
Candidate Overdue	~65
Awaiting Approval	~2
Approval Overdue	~5
Error	~2



## WorkSight Dashboard



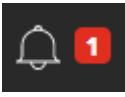
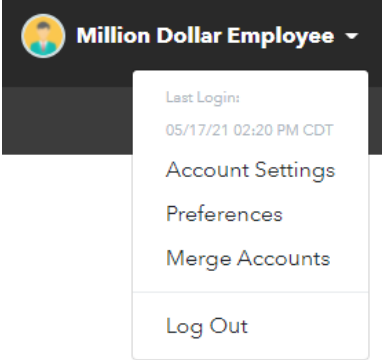
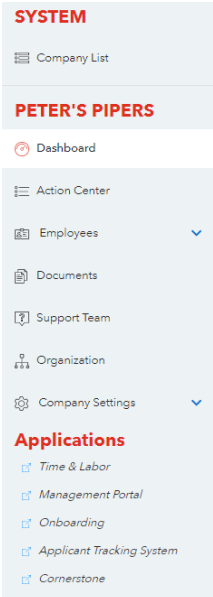
The WorkSight Dashboard is like the dashboard in a car. It organizes, stores, and displays important information from multiple systems into one easy to access location. We consider this location to be a Single Sign On (SSO) environment; you login once and all your applications are accessible.



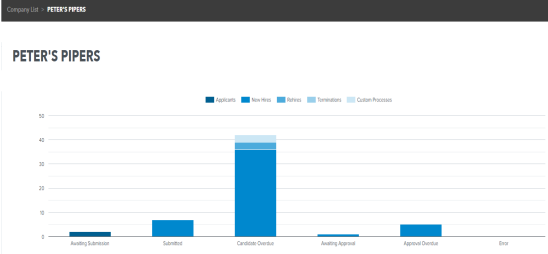
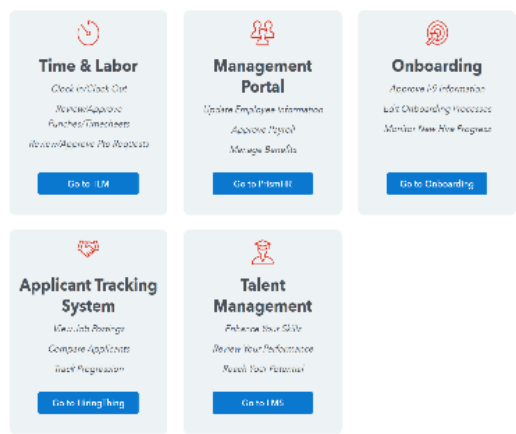

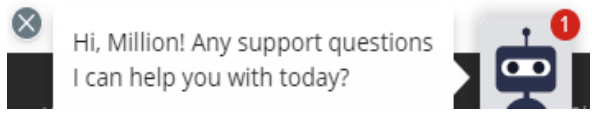
The screenshot shows the WorkSight dashboard for 'PETER'S PIPERS'. The interface includes a top navigation bar with the WorkSight logo (1), user role 'EMPLOYEE' (2), and user name 'Million Dollar Employee' (4). A left sidebar contains navigation menus for 'SYSTEM' (Company List), 'PETER'S PIPERS' (Dashboard, Action Center, Employees, Documents, Support Team, Organization, Company Settings), and 'Applications' (Time & Labor, Management Portal, Onboarding, Applicant Tracking System, Cornerstone) (5). The main content area features a bar chart (6) titled 'PETER'S PIPERS' showing metrics for Applicants, New Hires, Rehires, Terminations, and Custom Processes across stages: Awaiting Submission, Submitted, Candidate Overdue, Awaiting Approval, Approval Overdue, and Error. Below the chart are five tiles: 'Time & Labor' (7) with 'Go to TLM' button, 'Management Portal' with 'Go to PrismHR' button, 'Onboarding' with 'Go to Onboarding' button, 'Applicant Tracking System' with 'Go to HiringThing' button, and 'Talent Management' with 'Go to LMS' button. The footer contains 'powered by G&A Partners', contact information, a privacy policy link, and a chatbot (8) with the message 'Hi, Million! Any support questions I can help you with today?'.

⚠️ Based on your role and security level in WorkSight, the Status of Enrollment graph and some tiles may not be accessible to you.



	Icon/Pictorial	Function/Description
1		Click the <b>WorkSight logo</b> to return to the WorkSight Dashboard from wherever you are within WorkSight.
2		The <b>Employee/Manager toggle switch</b> allows you to alternate between employee and manager view. This toggle may not be present as it is managed in PrismHR and depends on your security access.
3		<b>Notifications</b> are important messages and alerts. A red count badge will display if there are new alerts since your last login.
4		Click on the drop-down arrow next to your name to access <b>Account Settings, Preferences, Merge Accounts, and Logout</b> . The drop-down list also displays the date and time of your last login. <b>Account Settings</b> allows you to view and make changes to your WorkSight account. <b>Preferences</b> allows you to turn on/off I-9 Notifications. <b>Merge Accounts</b> is used to combine two or more WorkSight accounts into one, as applicable. <b>Logout</b> is used to exit WorkSight.
5		The <b>Navigation Pane</b> makes it easy to quickly access pages within G&A Systems. <ul style="list-style-type: none"> <li>• Personal – Your employee information stored in PrismHR (i.e., personal information, employment summary, contact information, etc.)</li> <li>• Payroll – Your payroll information stored in PrismHR (i.e., pay history and direct deposit)</li> <li>• Taxes – Your tax withholding and W-2.</li> <li>• Time Off – Time-off leave and request time-off.</li> <li>• Benefits – Your benefit election information.</li> <li>• Documents – Your onboarding documentation.</li> <li>• Organization – Your org chart</li> <li>• Applications – links to SaaShr (time &amp; labor) and PrismHR (payroll &amp; benefits)</li> </ul>



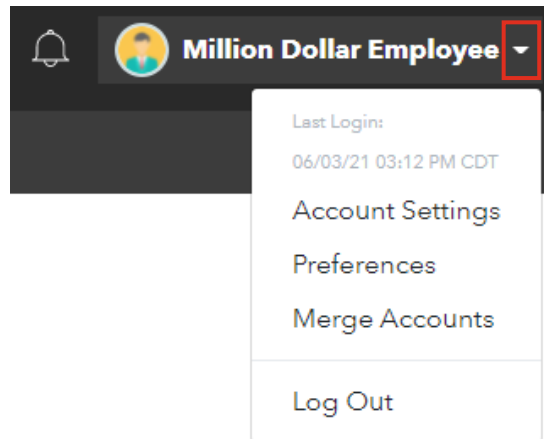
	Icon/Pictorial	Function/Description
6		<p>The <b>Status of Enrollment graph</b> appears above the tiles on the WorkSight Dashboard and provides the status of each employee during the onboarding process. There are six different statuses in the onboarding process. This graph is only visible to managers.</p>
7		<p><b>Tiles</b> are located below the Status of Enrollment graph in the main section of the WorkSight Dashboard. Tiles provide access to a specific G&amp;A system for which the tile is named.</p> <ul style="list-style-type: none"> <li>• <i>Time &amp; Labor</i> is SaaShr.</li> <li>• <i>Management Portal</i> is PrismHR.</li> <li>• <i>Onboarding</i> is Click Boarding.</li> <li>• <i>Applicant Tracking System</i> is HiringThing. (Only for managers.)</li> <li>• <i>Talent Management</i> is Cornerstone, G&amp;A's learning-management system.</li> </ul> <p> Based on your employer's configuration, you may not have all the tiles depicted here.</p>
8		<p>The <b>Chat Bot</b> appears in the bottom-right corner on the WorkSight Dashboard page to aid users while navigating.</p>



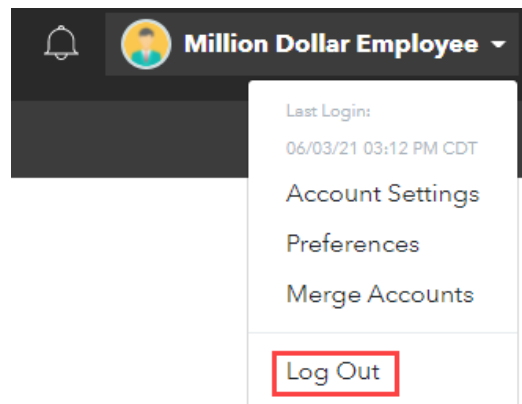
## Logging Out of WorkSight

Follow the steps below on how to log out of WorkSight.

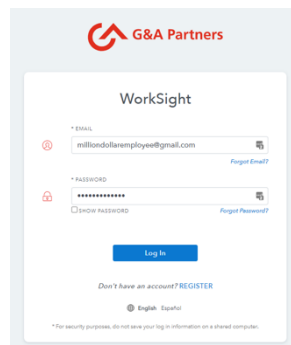
1. Click on the drop-down arrow next to your name in the upper right-hand corner of the WorkSight Dashboard. A drop-down list will display:



2. Click Log Out.



The WorkSight Login page will display when you have successfully logged out of WorkSight.





## Time and Labor Management (TLM)

G&A offers a comprehensive Time and Labor Management system, SaaShr, that addresses your time tracking and absence management needs. Throughout this user guide, Time and Labor Management will be referred to as TLM.

In this section, you will find information on:

- Accessing TLM
- Direct Login to SaaShr (Mobile Application Only)
- TLM Dashboard
- Navigating SaaShr
- Signing out of TLM



## Accessing Time and Labor Management (TLM)

Follow the steps below to access TLM through WorkSight.

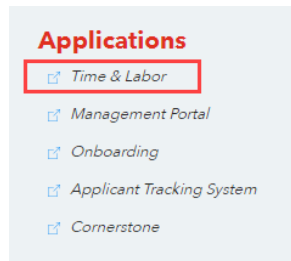
### Option 1:

1. After logging into WorkSight, confirm that you are in the Manager's view.

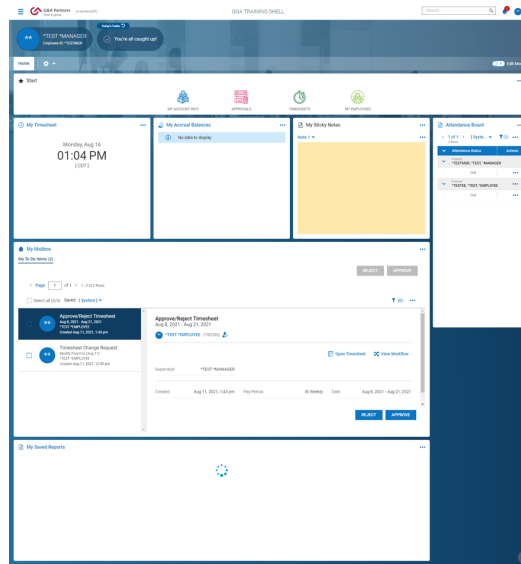



If you are in the employee view, click the toggle switch to change to manager view.

2. Click on the Time & Labor link under the Applications header in the Navigation Pane.



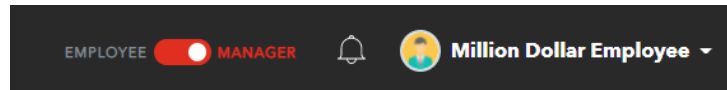
The SaaShr (G&A's Time and Labor Management system) Dashboard will open a new tab within your browser.




 Depending on your level of TLM security access, your customizable dashboard may vary in view.

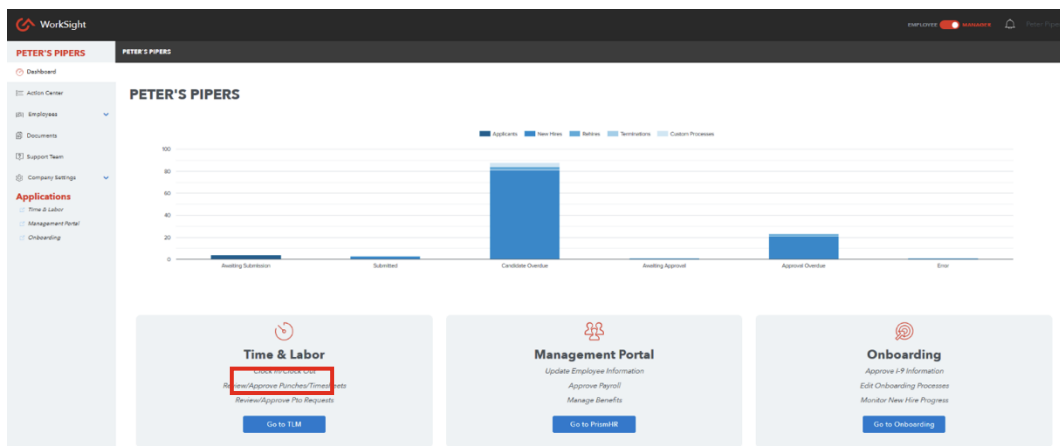
**Option 2:**

1. After logging into WorkSight, confirm that you are in the Manager’s view.



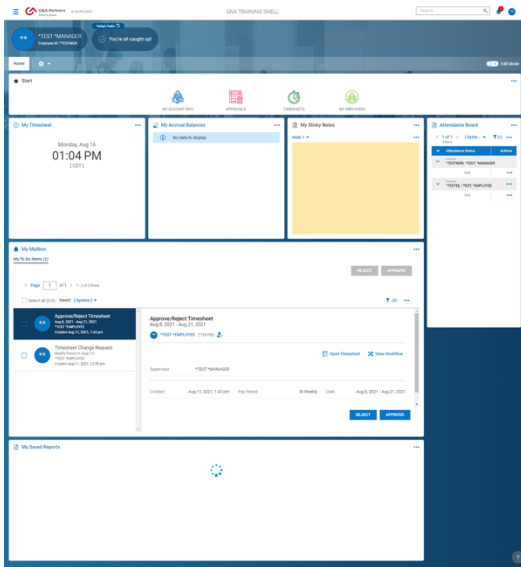
 If you are in the employee view, click the toggle switch to change to manager view.


2. Within the “Time & Labor” tile on your home screen, click on the “Go to TLM” button to be directed into SaaShr, G&A’s Time and Labor Management system.



The SaaShr (G&A’s Time and Labor Management system) Dashboard will open a new tab within your browser.






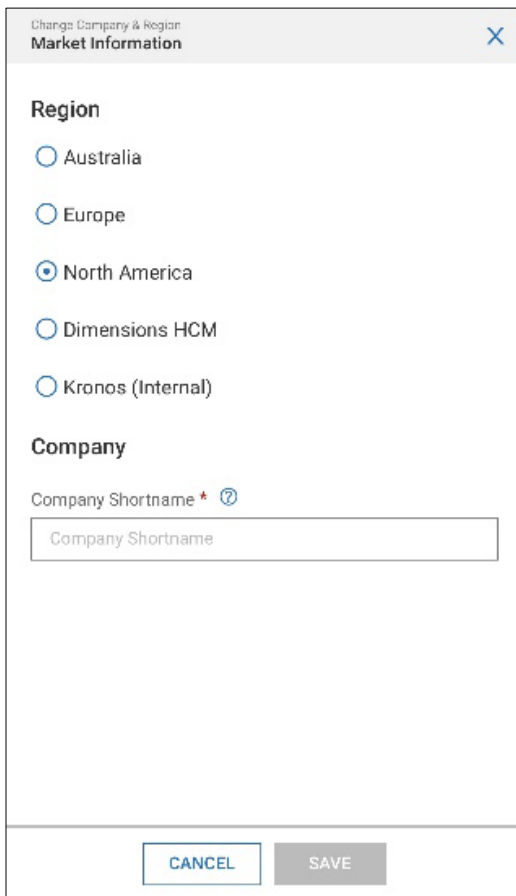
 Depending on your level of TLM security access, your customizable dashboard may vary in view.



## Direct Login to SaaShr (Mobile Application Only)

 If your company has opted to utilize Direct Login, this portion of the user guide will assist you with accessing the mobile application. If your company has chosen not to utilize this feature, this portion of the user guide will not apply.

Upon hire, you will receive an email containing a link to download the mobile application (for Android and iPhone), your “Company Shortname”, “Username” and temporary “Password.” You will need to enter this information when logging into the mobile application for the first time.



Change Company & Region  
Market Information

**Region**

Australia


Europe

North America

Dimensions HCM

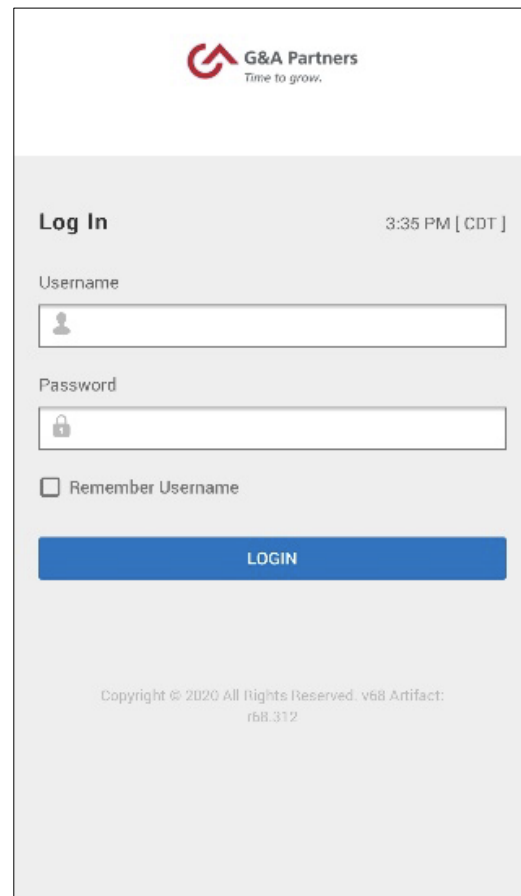
Kronos (Internal)


**Company**

Company Shortname \* 

Company Shortname

CANCEL SAVE



 **G&A Partners**  
Time to grow.

**Log In** 3:35 PM [ CDT ]

Username

Password

Remember Username

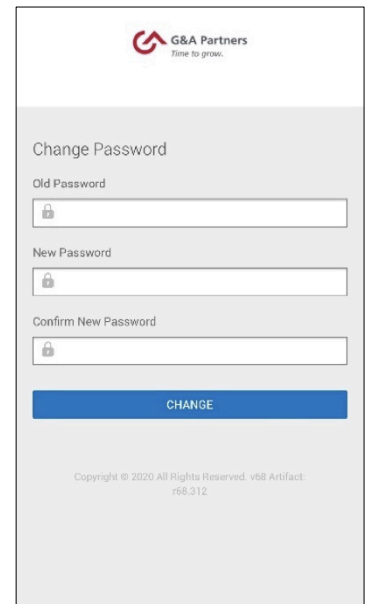
LOGIN

Copyright © 2020 All Rights Reserved. v68 Artifact: r68.312



After your initial login, you will be prompted to reset your password. Your new password must meet the following requirements:

- Be at least 8 characters long
- Contain at least 1 upper case letter
- Contain at least 1 lower case letter
- Contain at least 1 number
- Contain at least 1 special character (!, @, #, etc.)

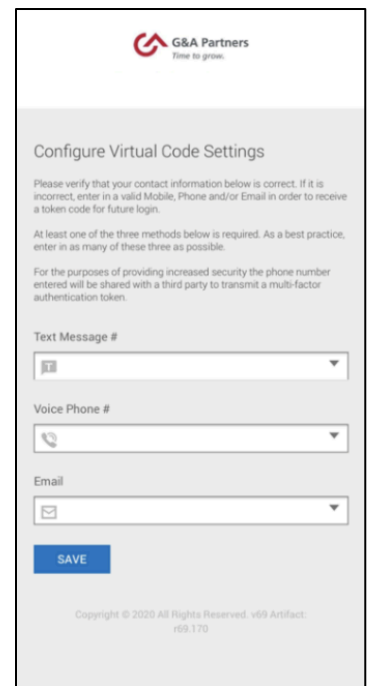


The screenshot shows the 'Change Password' interface. It includes the G&A Partners logo at the top, followed by the title 'Change Password'. There are three input fields: 'Old Password', 'New Password', and 'Confirm New Password', each with a lock icon on the left. Below the fields is a blue 'CHANGE' button. At the bottom, there is a copyright notice: 'Copyright © 2020 All Rights Reserved. v68 Artifact r68.312'.

Once your password has been created, you will begin to configure your Virtual Code Authentication (VCA) settings. For security purposes, VCA will be utilized to verify yourself upon the direct login to SaaSshr under the following scenarios:

- An expired “cookie” (unsuccessful login for at least 30 days)
- Logging into a new device
- Too many failed login attempts

You can choose up to three methods for receiving a VCA code. It is highly recommended that you set more than one method.

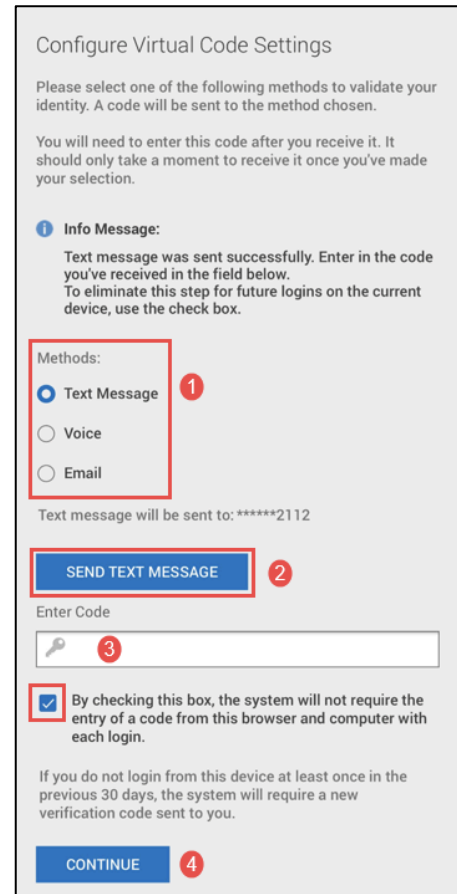


The screenshot shows the 'Configure Virtual Code Settings' interface. It includes the G&A Partners logo at the top, followed by the title 'Configure Virtual Code Settings'. Below the title is a paragraph of instructions: 'Please verify that your contact information below is correct. If it is incorrect, enter in a valid Mobile, Phone and/or Email in order to receive a token code for future login.' This is followed by another paragraph: 'At least one of the three methods below is required. As a best practice, enter in as many of these three as possible.' A third paragraph states: 'For the purposes of providing increased security the phone number entered will be shared with a third party to transmit a multi-factor authentication token.' There are three dropdown menus: 'Text Message #' with a text message icon, 'Voice Phone #' with a telephone handset icon, and 'Email' with an envelope icon. Below the dropdowns is a blue 'SAVE' button. At the bottom, there is a copyright notice: 'Copyright © 2020 All Rights Reserved. v69 Artifact r69.170'.



Once you configure your methods, you will be required to choose a method to validate your identity:

1. Select the radio button next to your desired method.
2. Click the “SEND TEXT MESSAGE” button.
3. After receiving your VCA code, enter it into the designated field.
4. Check the box to not require this step for the next 30 days.
5. Click “CONTINUE” to validate and log into SaaShr.



Configure Virtual Code Settings

Please select one of the following methods to validate your identity. A code will be sent to the method chosen.

You will need to enter this code after you receive it. It should only take a moment to receive it once you've made your selection.

**Info Message:**  
Text message was sent successfully. Enter in the code you've received in the field below.  
To eliminate this step for future logins on the current device, use the check box.

Methods:

- Text Message **1**
- Voice
- Email

Text message will be sent to: \*\*\*\*\*2112

**SEND TEXT MESSAGE** **2**

Enter Code

**3**

By checking this box, the system will not require the entry of a code from this browser and computer with each login.

If you do not login from this device at least once in the previous 30 days, the system will require a new verification code sent to you.

**CONTINUE** **4**

If you have issues accessing the WorkSight mobile application, please contact G&A Partners AccessHR, our enhanced, on-demand customer service team (formerly the Customer Care Center):

Hours: Monday – Friday | 7:30 a.m. – 7:00 p.m. CT

Email: [accesshr@gnapartners.com](mailto:accesshr@gnapartners.com)

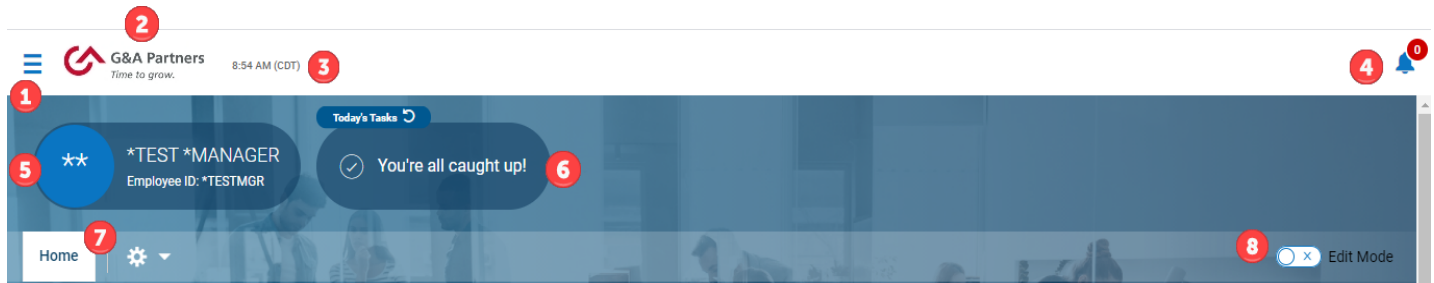
Phone: 866-497-4222


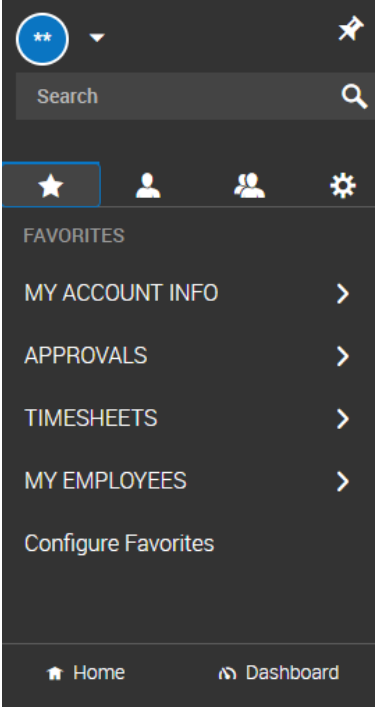


## Time and Labor Management (TLM) Dashboard

The TLM Dashboard is your home page within SaaShr. Following is a description of the main components that make up the TLM Dashboard: Header and Start.

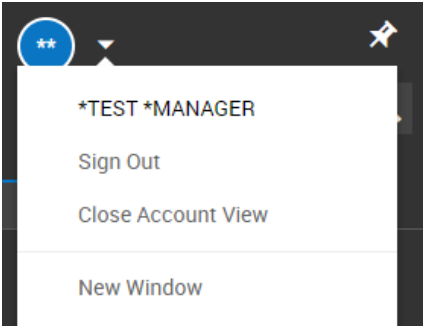



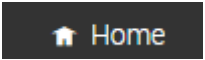
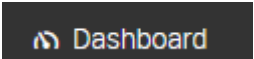
### Header:





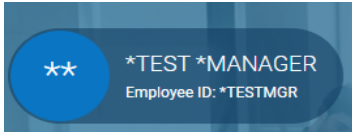
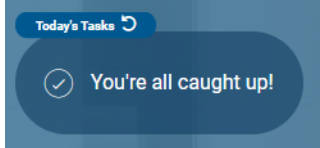

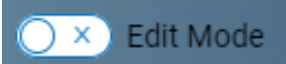
	Icon/Pictorial	Description
1		The <b>Menu</b> icon (Hamburger button) allows you to toggle between the menu being hidden behind the button or displayed on the page.
1a		Clicking the Menu icon displays the <b>Side Menu</b> .





	Icon/Pictorial	Description
1b		<p>The drop-down arrow presents a set of options:</p> <p>Clicking your name (shown as <b>*TEST* MANAGER</b> in this example) displays <b>“My Profile”</b> to the right of the page.</p> <p><b>Sign out</b> - logs you out of SaaShr.</p> <p><b>Close Account View</b> - closes the dashboard.</p> <p><b>New Window</b> - creates a duplicate tab in your browser.</p>
1c		<p><b>Thumbtack</b> icon pins/un-pins the Side Menu to the dashboard.</p>
1d		<p><b>Search</b> - Allows you to search for items throughout SaaShr.</p> <p>⚠️ You are only able to search for items based on your security profile.</p>
1e		<p>The next section in the Side menu contains four tabs:</p> <p><b>Favorites</b> (star icon) - Presents your ‘favorite’ links and pages within SaaShr.</p> <p>⚠️ A set of default favorites has been prefigured for you.</p> <p><b>My Info</b> (icon representing a single person) - Presents information about your personal TLM profile.</p> <p><b>Team</b> (icon representing multiple people) - Presents information regarding your assigned employees.</p> <p><b>Admin</b> (gear icon) - Presents company level information and functionality.</p>
1f		<p><b>Home</b> - Clicking Home will close the side menu and return the screen to the dashboard view.</p>
1g		<p><b>Dashboard</b> - Clicking Dashboard displays Time Off Awaiting My Approval, Missing Punches, Timesheets Awaiting My Approval, and My Saved Reports.</p>



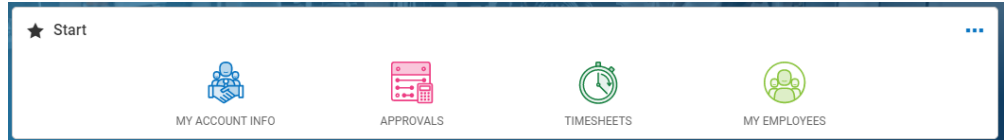
	Icon/Pictorial	Description
2		Clicking <b>G&amp;A's logo</b> will return the screen to the dashboard view.
3	10:21 AM (CDT)	The <b>Current Time</b> displays when you access the system.
4		<b>To Do Items</b> shows pending approvals for your assigned employees.
5		The <b>My Account Info</b> displays your photo (when one is uploaded), your name, employee ID, hire date, and displays your tenure.
6		<b>Tasks</b> will display any action items assigned to you.
7		The <b>Settings</b> (gear) icon when clicked provides a list of options: <b>Edit Tabs</b> - Edit dashboard tabs. <b>Enable Edit Mode</b> - Edit content on your dashboard. <b>Reset Configuration</b> - Restores to original system state. <b>Refresh</b> - Reloads or updates the information on the page. <b>Print</b> - Opens the print dialog box to printing options for the page.
8		The <b>Edit Mode</b> toggle switch defaults to off. To edit the content on your dashboard, click the Edit Mode toggle switch to on.











**Start:**

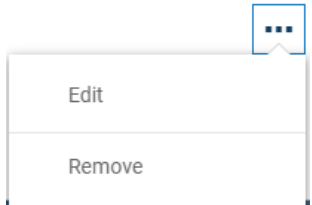
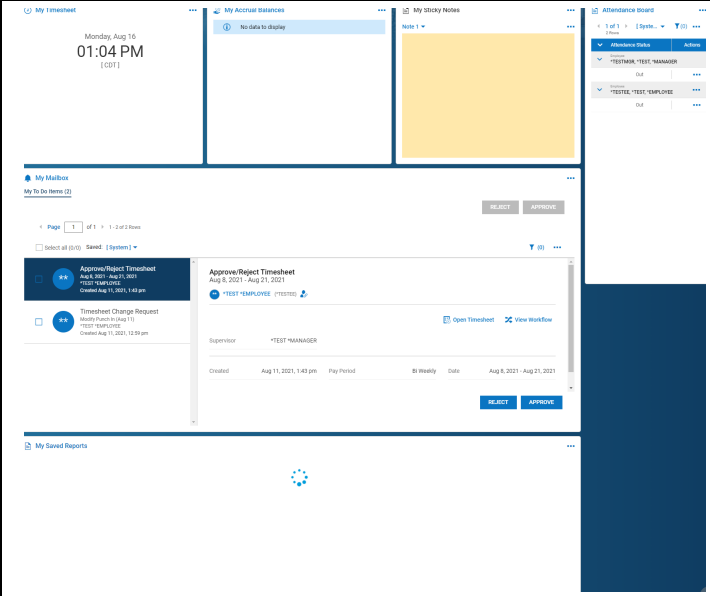
The Start widget has been preconfigured with 4 categories:

- My Account Info
- Approvals
- Timesheets
- My Employees



Widget	Description
 MY ACCOUNT INFO	 <b>MY ACCOUNT INFO</b>  <a href="#">Request Time Off</a> <a href="#">My Current Timesheet</a> <a href="#">My Time Off History</a> <a href="#">My Time Off &amp; Holidays Calendar</a>
 APPROVALS	 <b>APPROVALS</b>  <a href="#">Pending Timesheet Change Requests</a> <a href="#">Pending Time Off Approval</a>
 TIMESHEETS	 <b>TIMESHEETS</b>  <a href="#">Missed Punches Report</a> <a href="#">Current Pay Period Timesheets</a> <a href="#">By Pay Period Timesheets</a> <a href="#">All Timesheets</a>
 MY EMPLOYEES	 <b>MY EMPLOYEES</b>  <a href="#">Employee Profiles (Security, Badge, Schedules)</a> <a href="#">Employee Accrual Balances</a> <a href="#">Request Time Off on Employee Behalf</a> <a href="#">Anniversaries Calendar (Monthly)</a>



Icon	Description
	<p>The ellipsis indicates additional options on the SaaShr dashboard page.</p> <ul style="list-style-type: none"> <li>• <b>Edit</b> – Opens to the Start Widget configuration.</li> <li>• <b>Remove</b> – Deletes the Start Widget.</li> </ul>
	<p>The <b>Widgets</b> on the TLM dashboard allow you to view and access blocks of information on one page.</p> <p>⚠ Each client's dashboard is different and may be customized during configuration.</p>



## Navigating SaaShr

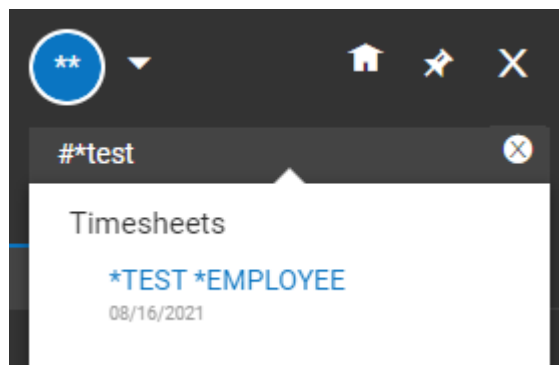
G&A Partners' Time and Labor Management (TLM) system, SaaShr, contains tools that you can use to navigate within the system to view information and perform tasks.

### Search

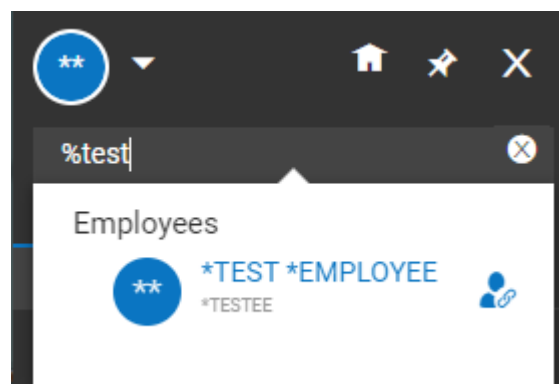
Within the Side menu is a Search field that allows you to search for items throughout SaaShr. You can search for specific employees (by name, ID, or badge), any TLM report (if you know the name), and current timesheets.

**Search Shortcuts** allow for quick navigation to desired information however, you are only able to search for items based on your security profile.

Type “#” before a name to access the employee’s current timesheet.

















Type “%” before a name to access the employee record.

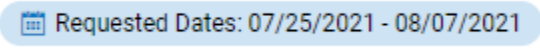
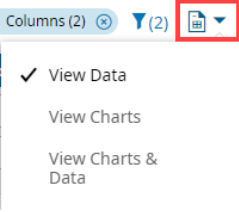
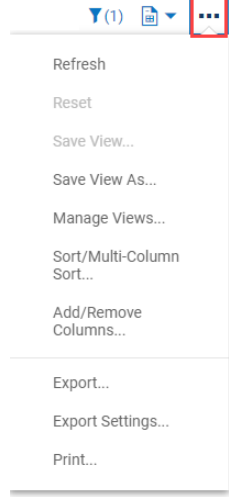






## Icons

Within SaaShr, there are several icons across the application that may be seen on multiple pages and reports. The most common are listed below.

Icon	Function
	The <b>Lookup List</b> icon shows a list of available options. Options may vary depending on the field or report associated.
	The <b>Notes</b> icon allows you to add a note within the associated form. Notes are most used within the timesheets.
	The <b>Calendar</b> icon allows you to choose a specific date from a calendar view. This will update the report and associated data to the date/week chosen.
	The <b>Back Arrow</b> is used to navigate to the previous screen.  Do not use your browser's back arrow as this will log you out of the application.
 February 08, 2021 - February 21, 2021	The <b>Date Toggle</b> allows you to navigate to a past or future date range, i.e., pay period, week, month, etc. You can click on the arrow pointing left for past or the arrow pointing right for future. To select a specific date (past or present), click on the calendar icon and select the date.
	<b>To Do Items</b> icon shows pending approvals for your assigned employees.
	<b>Additional Options</b> icon can show additional reporting options, export options and action items.
	The <b>Filter</b> icon is used to adjust column filters within a report.
	The <b>Employee Quick Links</b> icon allows you to access employee audits and timesheets.
	The <b>Export</b> icon allows you to export data in multiple file formats such as .csv, .xls, .xlsx, .pdf, .html, .xml, and .txt.
	<b>Full Screen</b> – Allows you to toggle between full screen and normal view.
 	<b>Approve button</b> – Allows you to approve the time off request(s) for each row selected. <b>Reject button</b> – Allows you to reject the time off request(s) for each row selected.

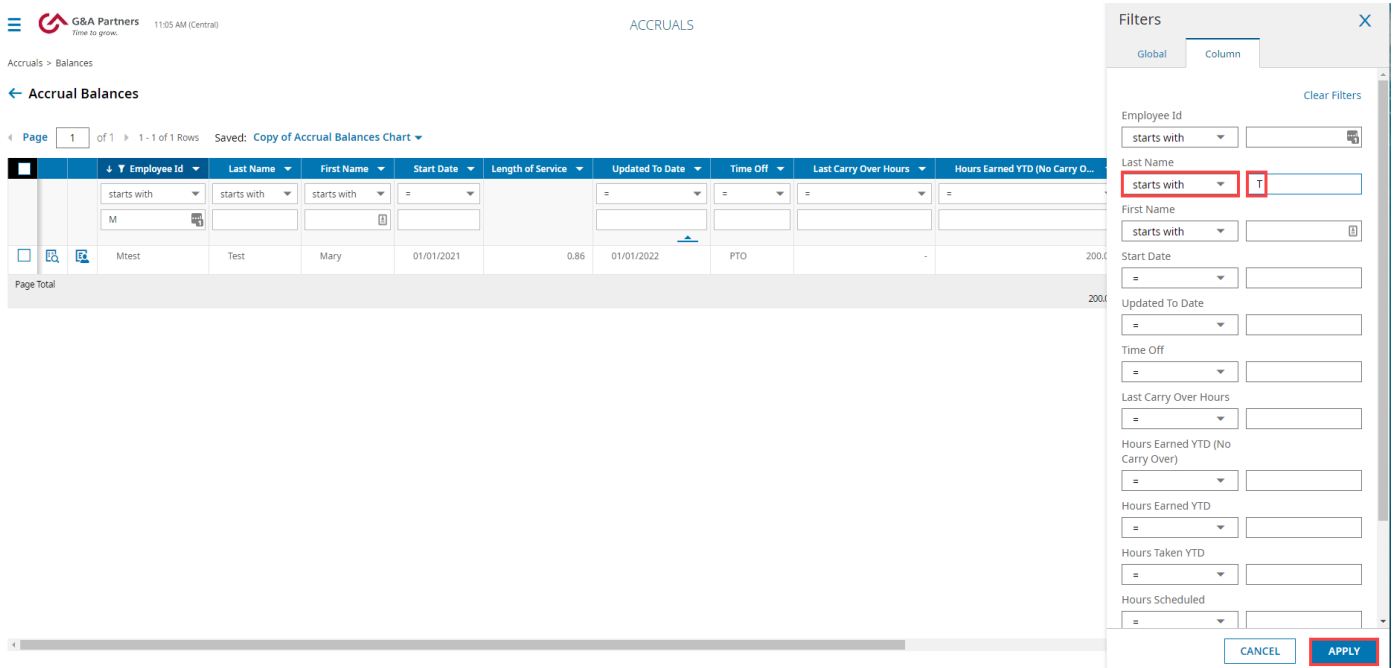


Icon	Function
	<p><b>Pay Period</b> – Displays the date range of the selected pay period. To change the date range, click on the drop-down arrow and select from calendar range, pay period, or expression. To change the From and To dates, overwrite the dates in the MM/DD/YYYY format or select from the calendar icon.</p>
	<p>The <b>View Data</b> icon allows you to select how to see your report information. View Data is the default view. You can select to View Charts or View Charts and Data.</p>
	<p>The <b>Actions</b> icon when clicked displays a list of report related options.</p>
	<p>The <b>Refresh</b> icon – Allows you to refresh data that is displayed.</p>
	<p>The <b>Clear Values</b> icon – Allows you to remove any values added to the report.</p>
	<p><b>Jump To Menu</b> icon – When clicked, opens the Jump To menu.</p>
	<p><b>Jump To</b> – When clicked, will take you to a specific part of the page.</p>



## Filters

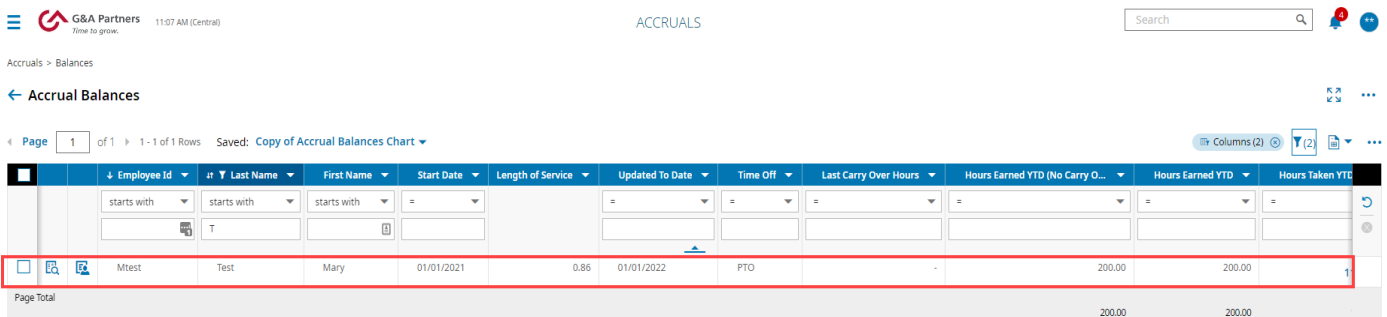
Many pages in TLM offer filters for sorting data including reports. Filters are useful for sorting data when looking for specific information within a large range of data. For example, trying to find a specific employee account among a large list of employees. You can find that employee account by entering the first few letters of the employee’s last name in the “Last Name” filter field, selecting the “Starts With” option, and then clicking the Apply button.



The screenshot shows the 'ACCRUALS' page with a table containing one row for employee 'Mtest' (Mary Test). The filters sidebar on the right is open, showing the 'Last Name' filter set to 'starts with' and 'T'. The 'Apply' button is highlighted in red.

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours	Hours Earned YTD (No Carry O...)
Mtest	Test	Mary	01/01/2021	0.86	01/01/2022	PTO	-	200.00

The page will refresh and display all users who fit the criteria entered.



The screenshot shows the 'ACCRUALS' page after filtering. The table now displays one row for employee 'Mtest' (Mary Test), which is highlighted with a red border. The filters sidebar is no longer visible.

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours	Hours Earned YTD (No Carry O...)	Hours Earned YTD	Hours Taken YTD
Mtest	Test	Mary	01/01/2021	0.86	01/01/2022	PTO	-	200.00	200.00	1





Additional Filter Options include:

- Sort (ascending/descending)
- Group results by column
- Remove column
- Filter by value

You can also quickly set value filters on multiple columns by clicking Columns.



The Definition/Function table below provides an example for each filter symbol using 7/6/21 as an example date:

Symbol	Definition	Function
=	Entry is exactly this	The entry equals 7/6/21
!=	Entry is not this	The entry does not equal 7/6/21
starts with	Entry starts with	Entry starts with abc
like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
in	Entry that includes	The entry includes 7/6/21
not in	Entries that do not include	The entry does not include 7/6/21
is null	Entries that are blank	The entry is blank
Is not null	Entries that are not blank	The entry has been filled in
Between	Entries between a range	The entry is between 100-105 This only applies to numerical date values and cannot be used with alphabetical values.
Not between	Entries not between a range	The entry does not include 100-105



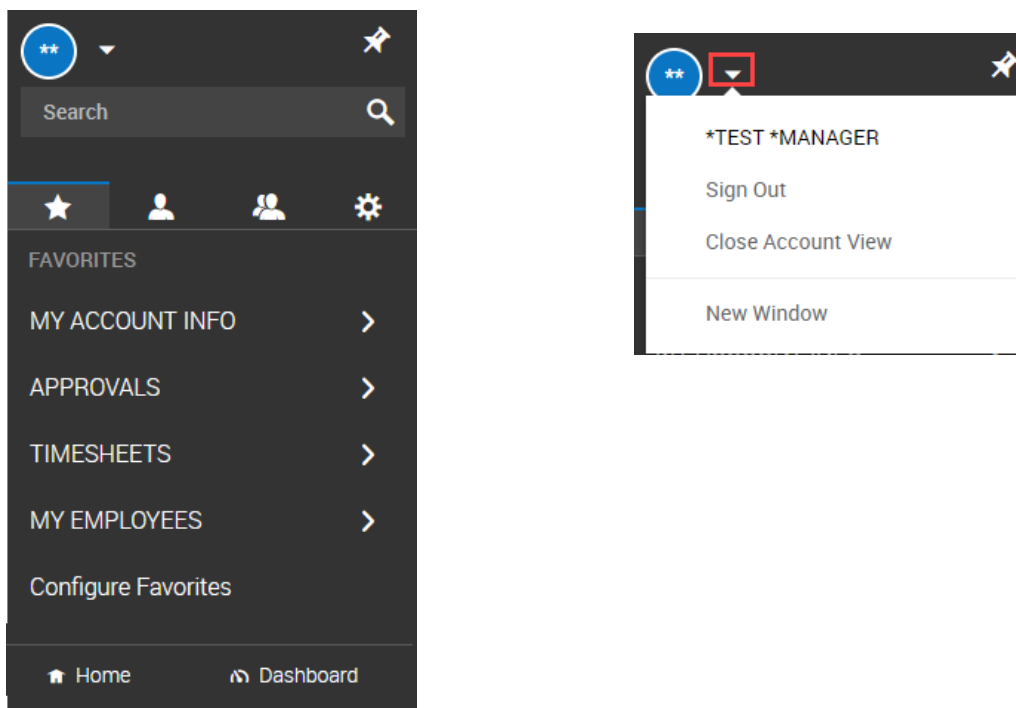
## Signing Out of Time and Labor Management (TLM)

Follow the steps below to sign out of TLM.

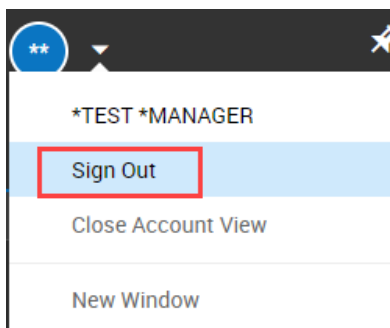
1. Click on the Side menu icon.




2. The Side menu will open. Click the drop-down arrow and a list will open.

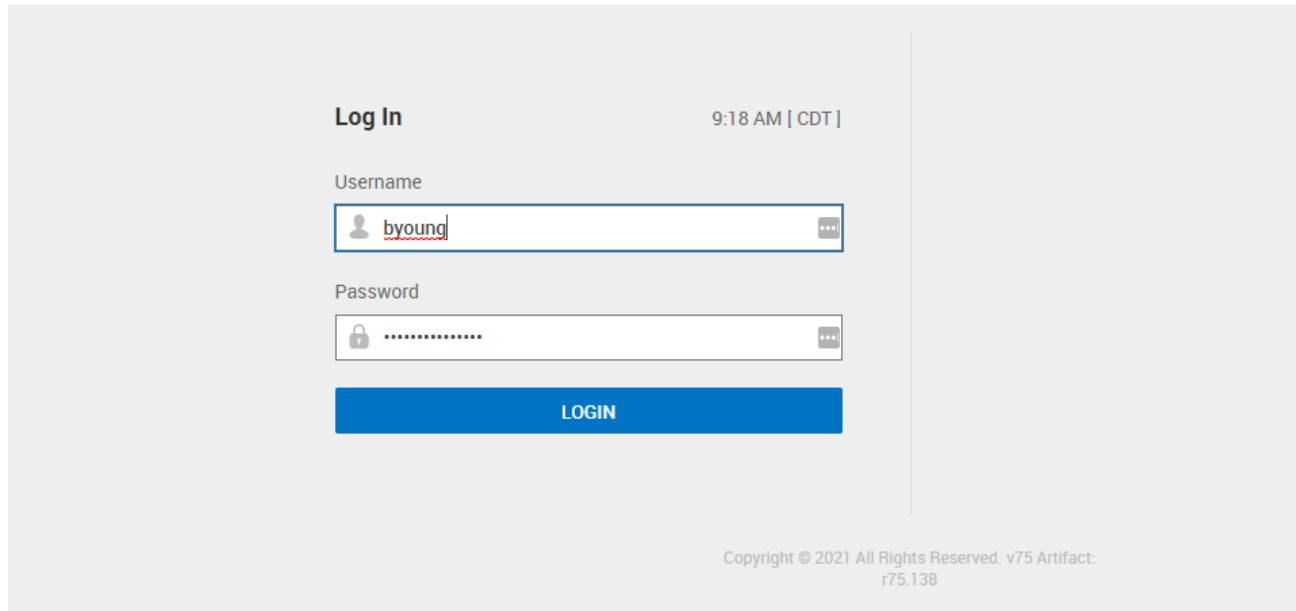


3. Click Sign Out.



4. The Login page will display once you've successfully signed out.

 *hr* - G&A ADMIN ACCOUNT -



The screenshot shows a login interface with the following elements:

- Log In** header and **9:18 AM [ CDT ]** timestamp.
- Username** field containing the text **byoung**.
- Password** field containing a series of dots for masking.
- A blue **LOGIN** button.
- Copyright notice at the bottom: **Copyright © 2021 All Rights Reserved. v75 Artifact: r75.138**



## My Account

Under the 'My Account' menu, various options have been set up for you. The options available may vary by company and by user.

Listed below are descriptions of each option.

- **My Actions** – Any actions requiring your attention, such as Time Off Requests from your employees.
- **My Benefits** – An area where you can view and select company benefits.
- **My Delegations** – An area where you can designate alternate managers to handle employee requests in your absence.
- **My Learning** – An area containing multiple documents and job aids to help you learn about the topic listed.
- **My Profile** – Allows you to view your personal information.
- **My Settings** – Contains options such as Change Password, Change Security Question, and Change Virtual Code Settings.
- **My Schedule** – Allows you to view your schedule.
- **My Time-Off** – Contains options to request time-off, as well as view your history, view your time-off requests on a calendar, and view your accruals history.
- **My Timesheet** – Contains options to view current and historical timesheets, as well as timesheet change requests.



## Employee Management

As a manager, you are designated as needed to view and edit the profiles of employees reporting to you.

This section provides information to help you manage your direct reports in TLM on how to:

- View and Edit an Employee's Profile in SaaShr
- Reset an Employee's Password in SaaShr
- Unlock an Employee's Account in SaaShr




## View and Edit an Employee Profile in SaaShr

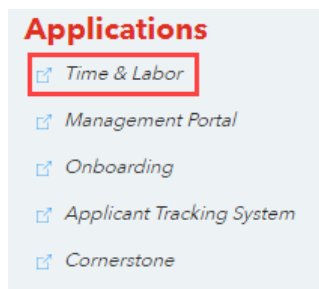
Within an employee's profile in SaaShr, G&A Partners' Time and Labor Management (TLM) system, you can view and/or edit an employee's information based on your company's configuration. Contact your System Administrator for any questions concerning the profiles available to your organization.

Follow the steps below to view and edit an employee's profile.

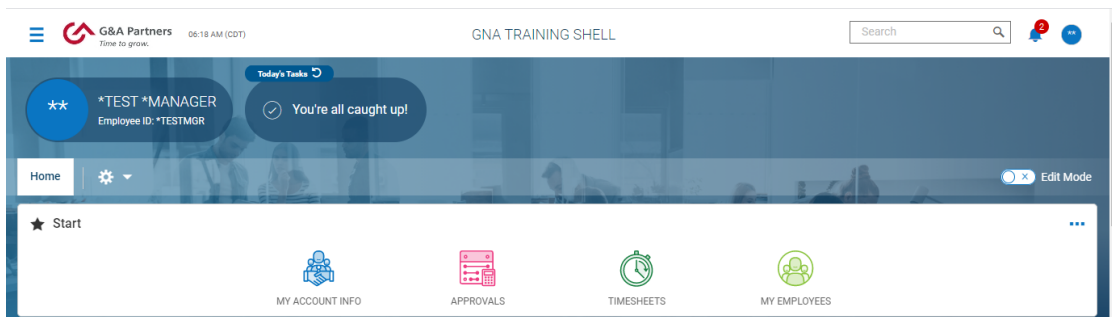
**1. Login to WorkSight.**

 If you are logged into WorkSight but not TLM, skip to step 2. If you are already logged into TLM, skip to step 3.

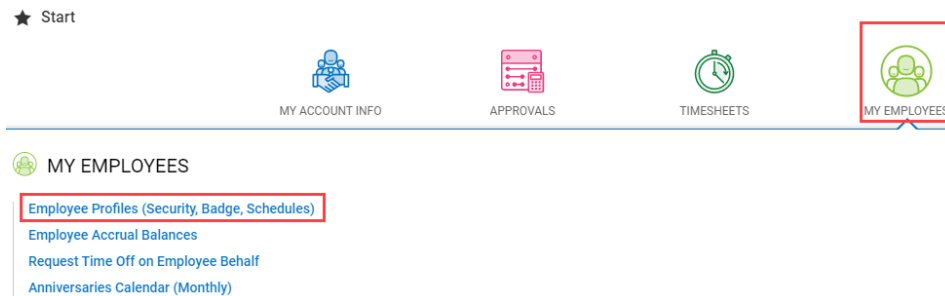
**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



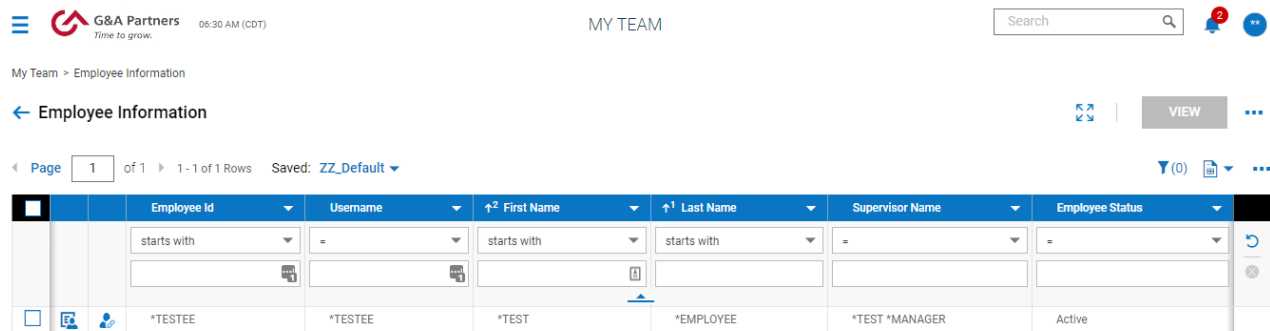
The TLM dashboard will display.



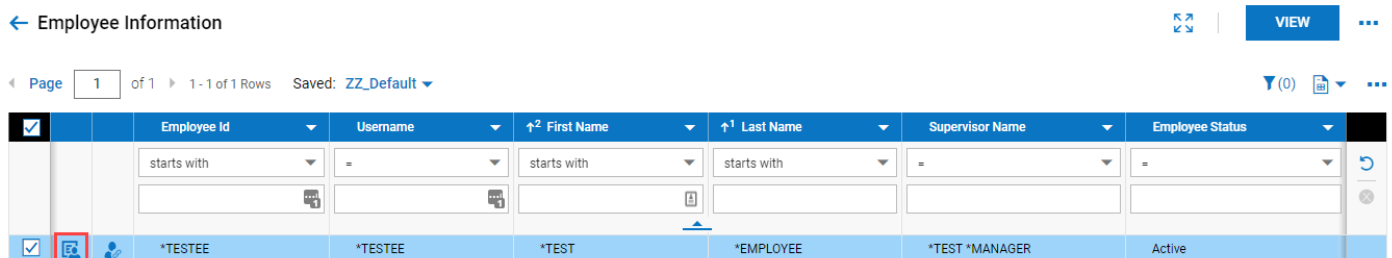
3. Click the My Employees widget then Employee Profiles (Security, Badge, Schedules).



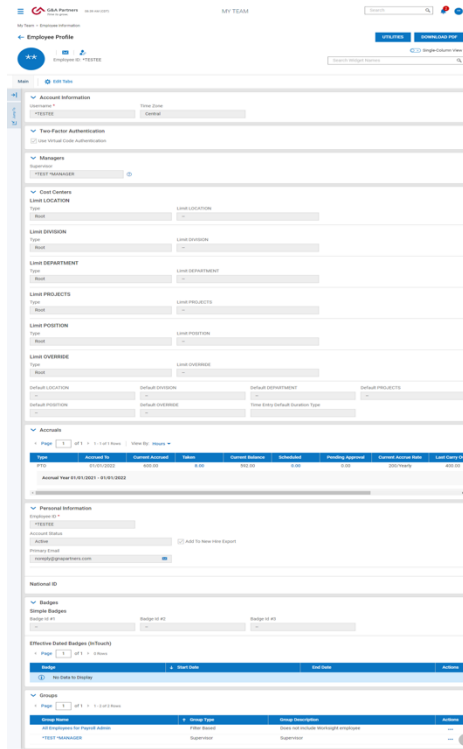
The My Team page will display.



4. Click the Employee Information icon on the row of the employee's profile you want to view.



The Employee Profile page will display.



**5. Make the applicable change(s).**

If ...	Then ...
Your company is using time clocks.	Continue to step 6 to enter the Badge number.
You are changing from Employee to Manager permissions when promoting or vice versa.	Your System Administrator will enter the update via the Security Profile.
Your company is maintaining their own PTO plans.	You can edit the PTO Plan.
You are assigning a manager.	Skip to step 7.
Your company utilizes the mobile app.	Your System Administrator can unlock or reset passwords from the Employee Profile page.






6. Enter the Badge number.

▼ Badges ↗

Simple Badges

Badge Id #1	Badge Id #2	Badge Id #3
<input style="width: 90%; border: 1px solid #ccc; border-bottom: 2px solid red;" type="text" value="--"/>	<input style="width: 90%; border: 1px solid #ccc;" type="text" value="--"/>	<input style="width: 90%; border: 1px solid #ccc;" type="text" value="--"/>


 Badge numbers should be entered in the “Badge Id #1” field ONLY. The badge number cannot be larger than 65000 and cannot start with leading zeros.

7. Assign a manager.

▼ Managers ↗

Supervisor

?

 By default, you can assign up to 2 managers.


If ...	Then ...
More than 2 managers need to be assigned.	Contact your System Administrator to have more added.
You have completed your review and/or changes to the employee’s profile and want to view the profile of another employee.	<ol style="list-style-type: none"> <li>1. Click <a href="#">← Employee Profile</a> .</li> <li>2. Click the Employee Information icon on the row of the employee’s profile you want to view.</li> <li>3. Repeat steps 5-8 as applicable.</li> </ol>
You want to sign out of TLM.	<ol style="list-style-type: none"> <li>1. Click the My Profile icon.</li> <li>2. Click Sign Out.</li> </ol>

8. Click Save once the information has been updated.




## Reset an Employee's Password in SaaShr

Resetting an employee's password is required when they have forgotten the current password.

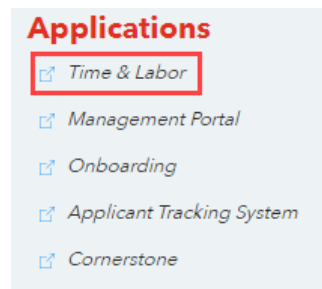
 Following the below steps will reset the password for the Mobile App only and will not update their WorkSight account.

Follow the steps below to reset an employee's password.

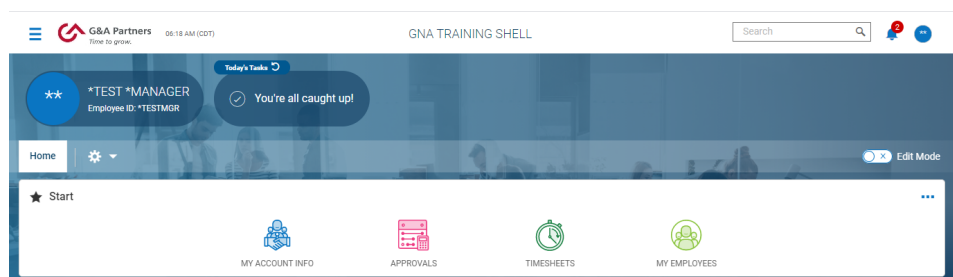
1. Login to WorkSight.

 If you are logged into WorkSight but not TLM, skip to step 2. If you are already logged into TLM, skip to step 3.

2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight Dashboard.



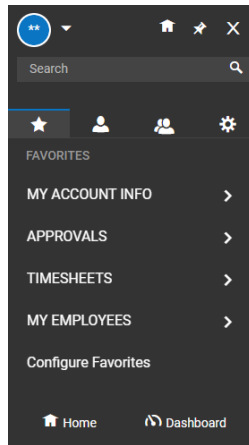
The TLM dashboard will display.



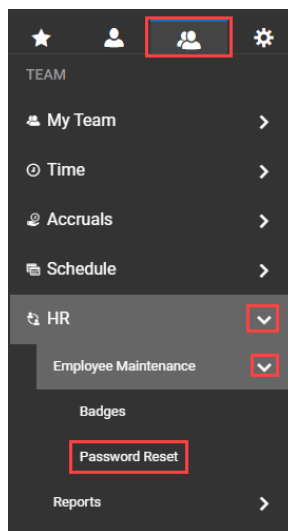
3. Click the Menu icon from the TLM dashboard.



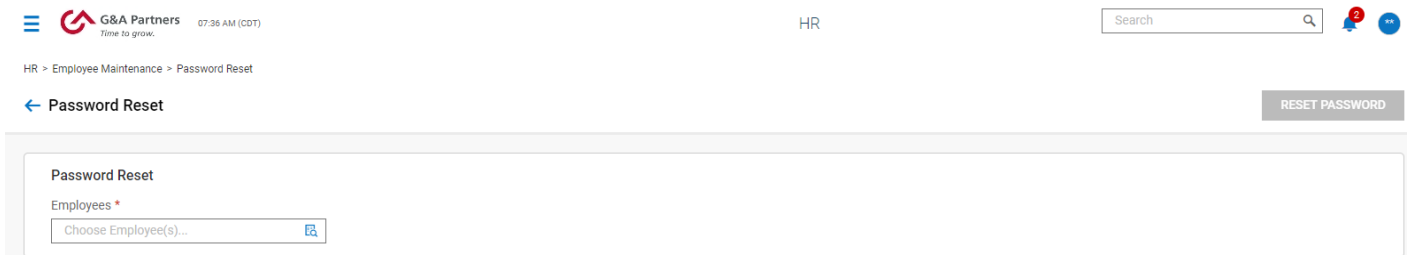
The Side menu will appear.



4. Click My Team > HR > Employee Maintenance > Password Reset.




The HR page will display.



5. Enter the employee's name or Employee ID in the Employees field.

### Password Reset

Employees \*

 As you enter a value, the Type Ahead feature displays potential matches based on the value(s) entered; To select, click on the name and it will auto fill the Employees field.

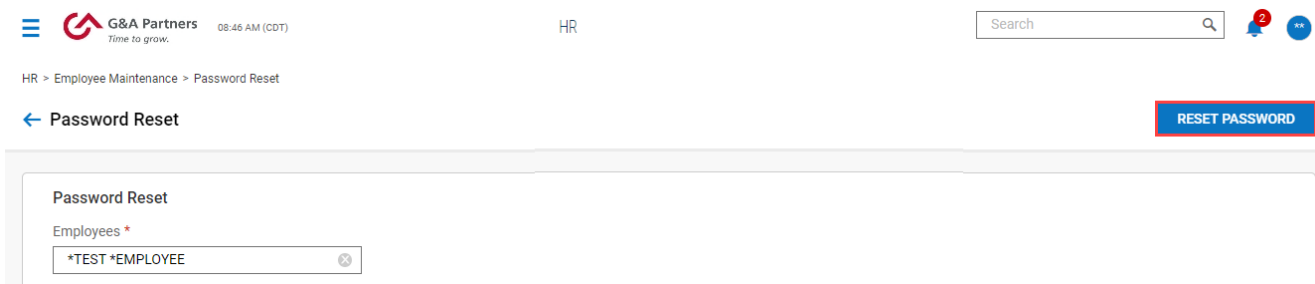
Employees \*

Browse Multiple Employees...

**\*TEST \*EMPLOYEE**

If ...	Then ...
You want to search for the employee or select multiple employees.	<ol style="list-style-type: none"> <li>1. Click the Lookup List icon.</li> <li>2. Click in the checkbox on the row of the employee(s) you want to select from 'Browse and Select Employees.'</li> <li>3. Click the Apply button.</li> <li>4. Continue to step 6.</li> </ol>
You want to clear the Employees field.	Click the X at the end of the field.

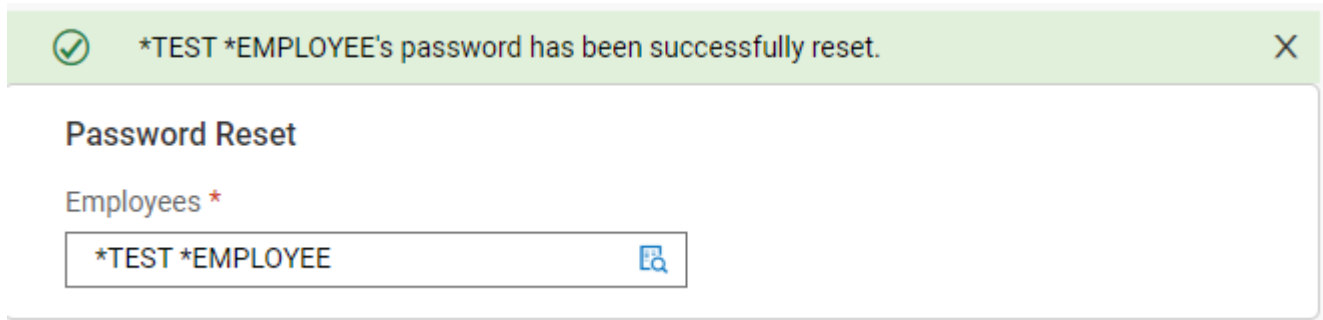
6. Click the Reset Password button.




 An employee's password will always default to "Password1!" when reset within SaaShr.



A confirmation message will display.



 Click the X in the confirmation message to close it.


 If you want to sign out of SaaShr, click on the My Profile icon and select Sign Out.

## Unlock an Employee's Password in SaaShr

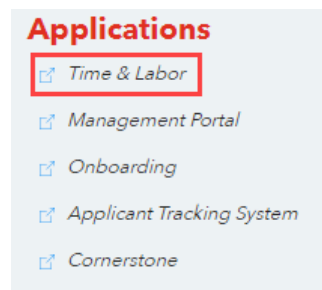
Unlocking an employee's password is required when their login attempts have failed.

Follow the steps below to unlock an Employee's Password.

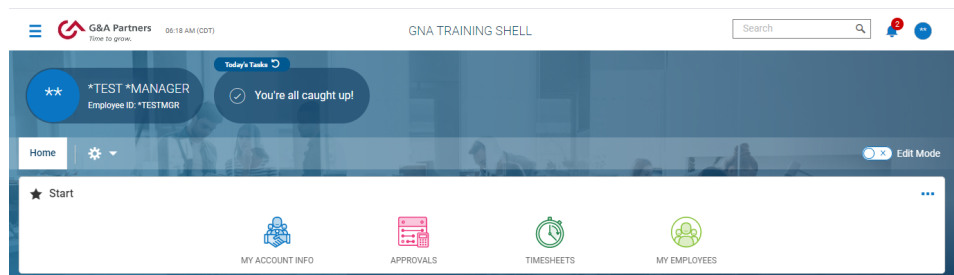
**1. Login to WorkSight.**

 If you are logged into WorkSight but not TLM, skip to step 2. If you are already logged into TLM, skip to step 3.

**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



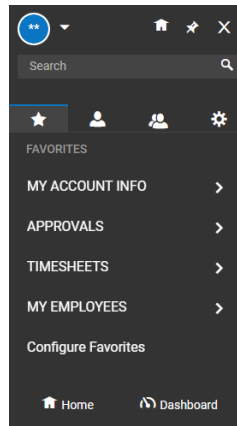
The TLM dashboard will display.



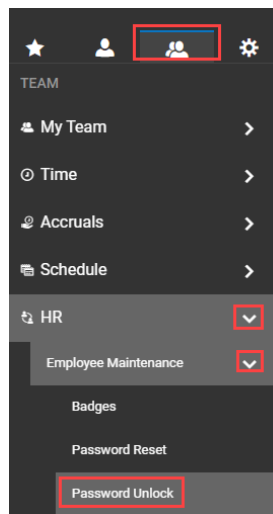
**3. Click the Menu icon from the TLM dashboard.**



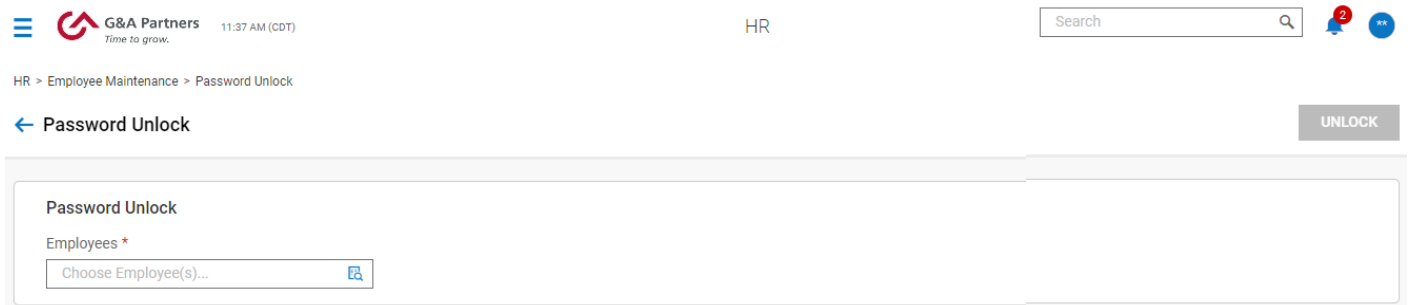
The Side menu appears.



4. Click My Team > HR > Employee Maintenance > Password Unlock.




The HR page displays.



5. Enter the employee's name or Employee ID in the Employees field.

### Password Unlock

Employees \*

 As you enter a value, the Type Ahead feature displays potential matches based on the value(s) entered; To select, click on the name and it will auto fill the Employees field.

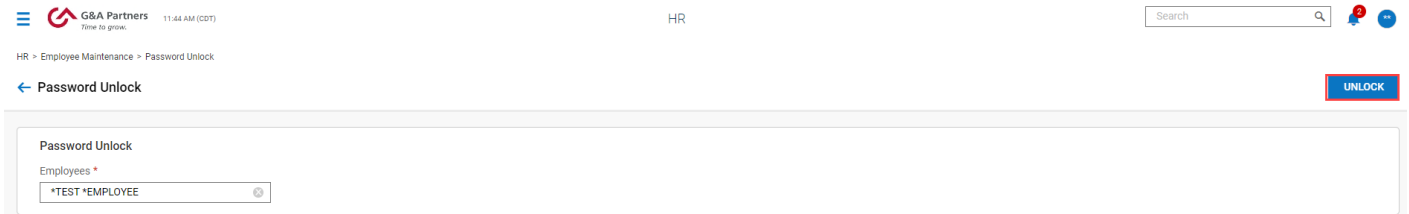
Employees \*

Browse Multiple Employees...

**\*TEST \*EMPLOYEE**

If ...	Then ...
You want to search for the employee or select multiple employees.	<ol style="list-style-type: none"> <li>1. Click the Lookup List icon.</li> <li>2. Click in the checkbox on the row of the employee(s) you want to select from 'Browse and Select Employees.'</li> <li>3. Click the Apply button.</li> <li>4. Continue to step 6.</li> </ol>
You want to clear the Employees field.	Click the X at the end of the field.

6. Click the Unlock button.

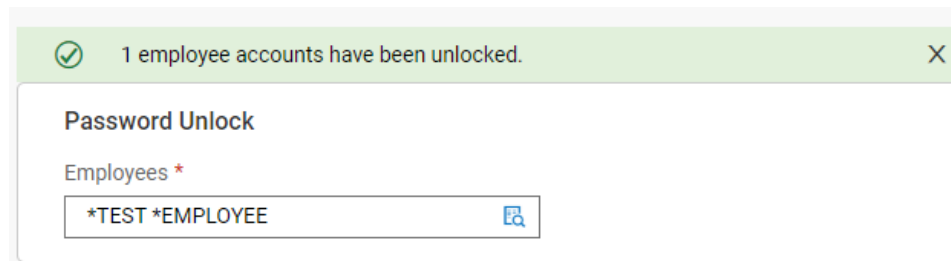


The screenshot shows the 'Password Unlock' page. At the top, there is a navigation bar with the G&A Partners logo, the time '11:44 AM (CDT)', and the page title 'HR'. Below the navigation bar, there is a breadcrumb trail: 'HR > Employee Maintenance > Password Unlock'. The main content area shows the 'Password Unlock' form with the 'Employees' field containing the text '\*TEST \*EMPLOYEE'. An 'UNLOCK' button is located in the top right corner of the form area.






A confirmation message will display.



 Click the X in the confirmation message to close it.

 If you want to sign out of SaaShr, click on the My Profile icon and select Sign Out.




# Time Tracking and Employee Timesheets

Time Tracking is the process of managing the work time of your direct reports in Time and Labor Management (TLM).

As a manager you have been designated to edit and approve timesheets for some or all of your employees' accounts. In this section, you will find information on how to:


- View Employee Timesheets
- Change Requests
- Edit Timesheets
- Process Timesheets

 A best practice is to review and address all Timesheet Change requests before manually editing employee timesheets. If this order is not followed, it may result in errors when trying to approve change requests.




## View Employee Timesheets

There are six timesheet views. The table below details each view.

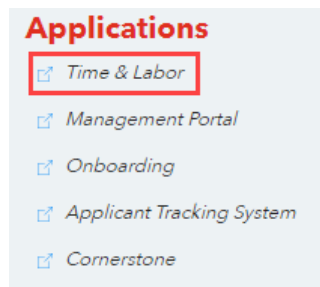
Timesheet View	Description
All Timesheets	View of all company timesheets, and access timesheet related functions for a specific date range.
Pending Approval	View of all timesheets which have been submitted by employees and are ready for approval prior to processing payroll.
By Pay Period	View based on time frame used to calculate earned wages.   This view is most frequently selected for viewing, editing, approving, and rejecting timesheets.
By Week	View of timesheet by week within a pay period.
Current	View of all timesheets within the current pay period.
All Open	View of all employee timesheets that are in the 'Open' state.

Follow the steps below on to view an employee's timesheet.

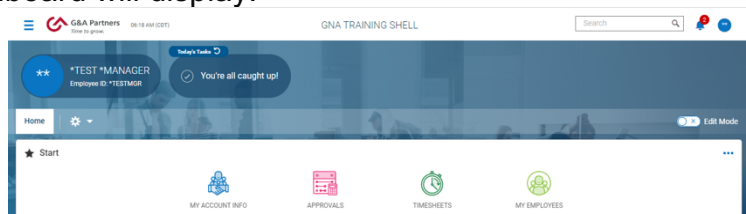
**1. Log into WorkSight.**

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



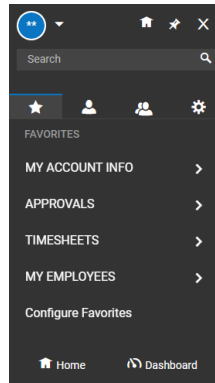
The TLM dashboard will display.



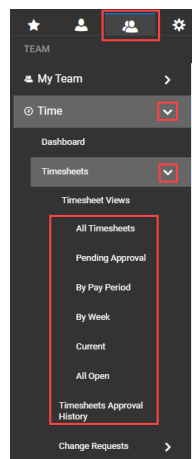
3. Click the Menu icon from the TLM dashboard.



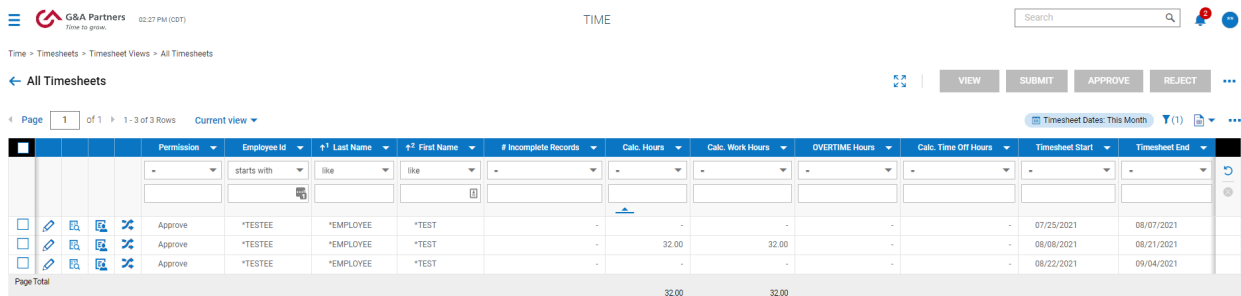
The Side menu will appear.



4. Click the My Teams tab > Time > Timesheets and select your view.



The Time page will open.



Permission	Employee Id	1 Last Name	2 First Name	# Incomplete Records	Calc. Hours	Calc. Work Hours	OVERTIME Hours	Calc. Time Off Hours	Timesheet Start	Timesheet End
Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-	-	-	07/25/2021	08/07/2021
Approve	*TESTEE	*EMPLOYEE	*TEST	-	32.00	32.00	-	-	08/08/2021	08/21/2021
Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-	-	-	08/22/2021	09/04/2021
Page Total					32.00	32.00				



## Change Requests

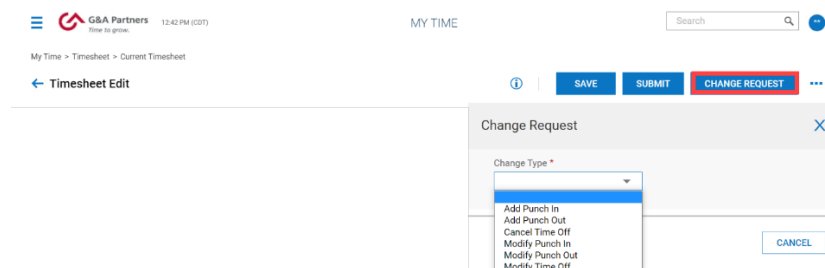
Employees record their work time via a series of clocking/punching in and clocking/punching out. Work time is calculated from the initial clock-in until the employee clocks out.

▼ Date		From	To	Raw Total	Calc. Total
▼ SUN Jun 27 No Schedule		07:00 am	11:00 am	4.00	4.00
		12:00 pm	04:00 pm	4.00	4.00
	+			8.00 hrs	8.00 hrs

⚠ Calculated Time is what exports out of Time and Labor Management (TLM) to PrismHR. The Raw Total is the total time in hours and minutes calculated from the 'From' and 'To' times. Clients that have an auto lunch deduction should be aware auto lunch is not reflected in the raw total. So, 4.00 hours could show 3.50 hours reflected in the "Calculated Time" column, which is shipped out to payroll.


Change Requests are made by employees via Timesheet Edit when they need a change to their timesheet. The type of changes which can be requested include:

- Add a punch-in or punch-out
- Modify a punch-in or punch-out
- Modify a cost center as part of a punch-in activity




Change Type	Function
Add Punch In/Punch Out	Should be used if there is not time existing for a punch.
Modify Punch In/Punch Out	Should be used for changing an existing punch that has already been made.



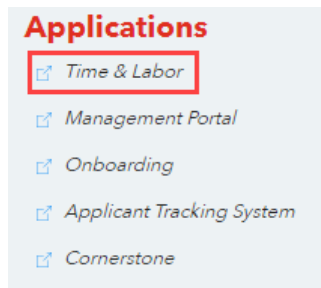
 Upon submission of a change request, a workflow is created, and the change request will route to your daily tasks and mailbox.

Follow the steps below to access Change Requests.

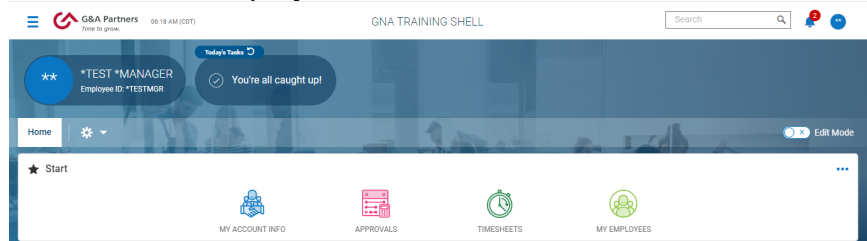
1. Log into WorkSight.

 If you are logged into WorkSight but not TLM, skip to step 2. If you are already logged into TLM, skip to step 3.

2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.



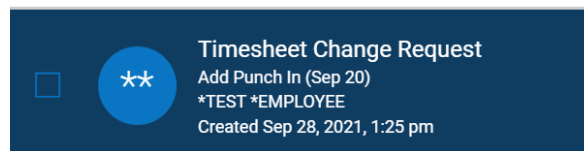
The TLM dashboard will display.




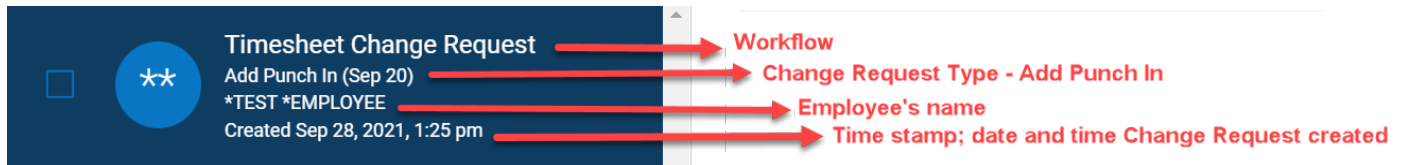
3. Click the “My Mailbox” icon.



4. Click on Timesheet Change Request and review.

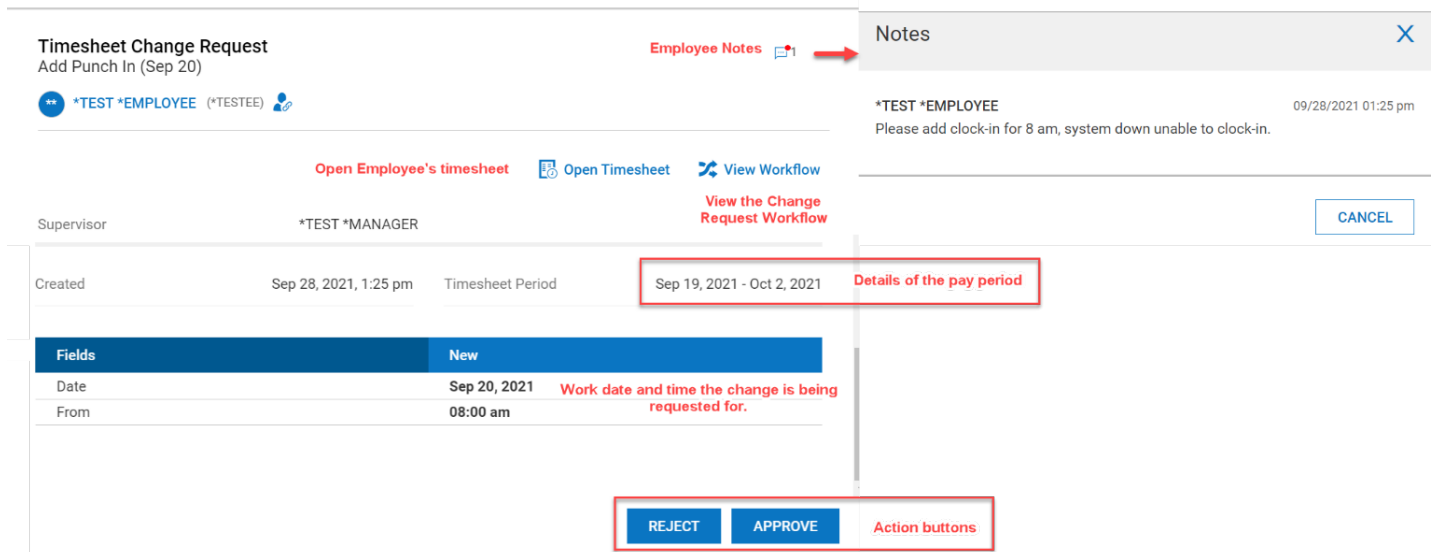


 Change requests must be reviewed and approved individually.



**Timesheet Change Request** → **Workflow**  
 Add Punch In (Sep 20) → **Change Request Type - Add Punch In**  
 \*TEST \*EMPLOYEE → **Employee's name**  
 Created Sep 28, 2021, 1:25 pm → **Time stamp; date and time Change Request created**

After clicking on the change request, additional information will be available.



**Timesheet Change Request**  
 Add Punch In (Sep 20)  
 \*TEST \*EMPLOYEE (\*TESTEE)

**Employee Notes** → **Notes**

\*TEST \*EMPLOYEE 09/28/2021 01:25 pm  
 Please add clock-in for 8 am, system down unable to clock-in.

**Open Employee's timesheet** **Open Timesheet** **View Workflow**

Supervisor: \*TEST \*MANAGER **View the Change Request Workflow** **CANCEL**

Created: Sep 28, 2021, 1:25 pm | Timesheet Period: Sep 19, 2021 - Oct 2, 2021 **Details of the pay period**

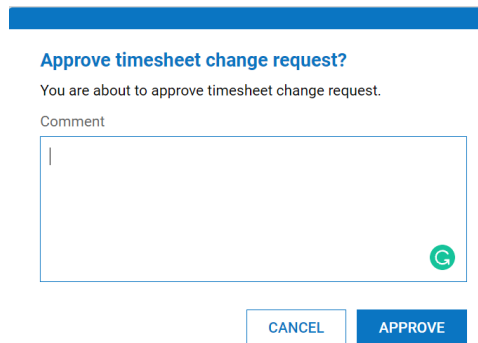
Fields	New
Date	Sep 20, 2021 <b>Work date and time the change is being requested for.</b>
From	08:00 am

**REJECT** **APPROVE** **Action buttons**

**5. Click on the appropriate action button.**

- To approve a Change Request, click the Approve button. When the approve confirmation dialog box appears, leave an optional comment, click approve again, then click OK to close the dialog box.

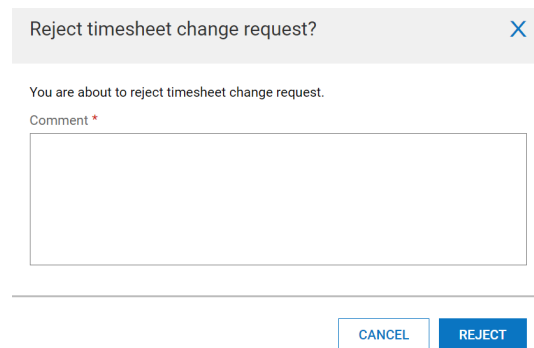




❗ When approving Change Requests, comments are optional.

❗ The approved time entry will automatically be placed on the timesheet. Depending on what type they choose, be it a "add time entry" or "modify punch", the addition of a time entry will add a new time entry line and the modify punch will replace whatever punch the employee chose to update.

- To reject a Change Request, click the Reject button. When the reject confirmation dialog box appears, leave a comment, click reject again, then click OK to close the dialog box.



❗ When rejecting Change Requests, comments are required.

❗ A notification for the rejected change request will route to the employee via email. After the employee makes the needed adjustment based on the rejection reason(s) given, the Change Request can be resubmitted for approval.






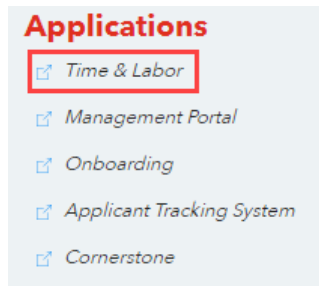
## Edit Timesheets

Follow the steps below to edit employee timesheets.

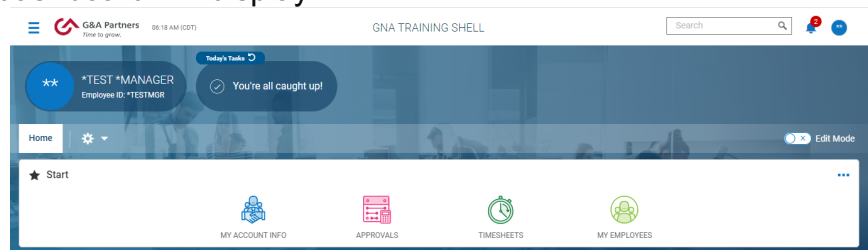
1. Log into WorkSight.

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

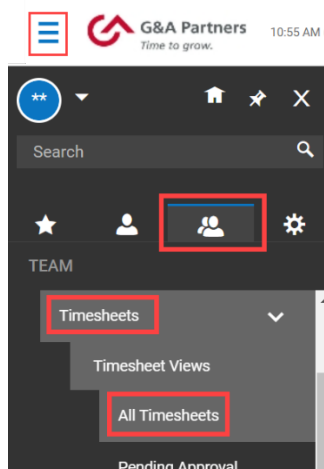
2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.



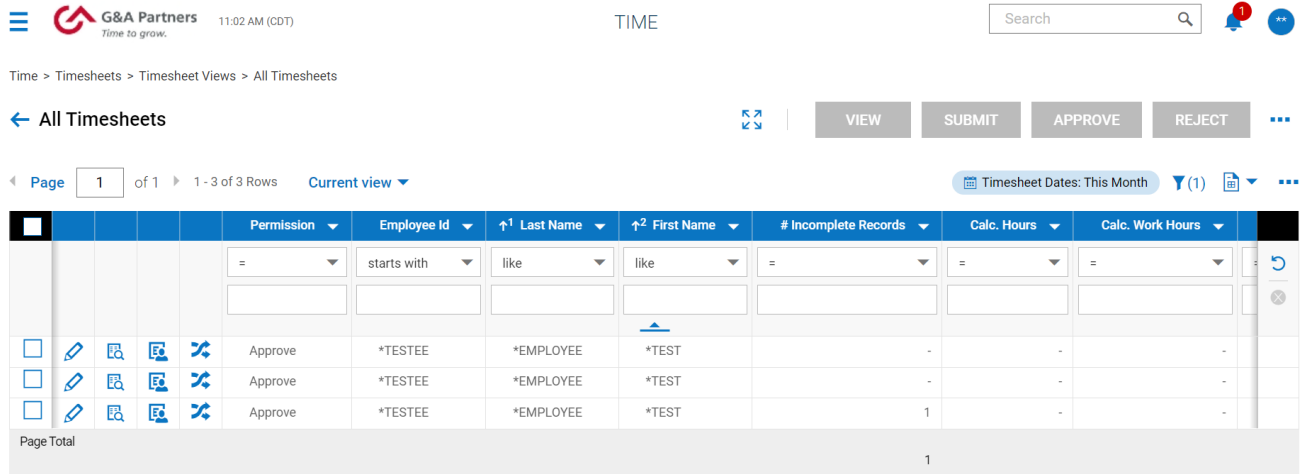
The TLM dashboard will display.



3. Navigate to the Team > Timesheets > All Timesheets via the Side menu.



All Timesheets will display.



TIME

Search

Time > Timesheets > Timesheet Views > All Timesheets

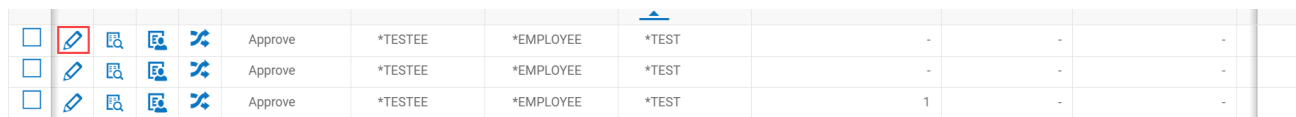
← All Timesheets




Page 1 of 1 | 1 - 3 of 3 Rows

Permission	Employee Id	Last Name	First Name	# Incomplete Records	Calc. Hours	Calc. Work Hours
Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-
Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-
Approve	*TESTEE	*EMPLOYEE	*TEST	1	-	-

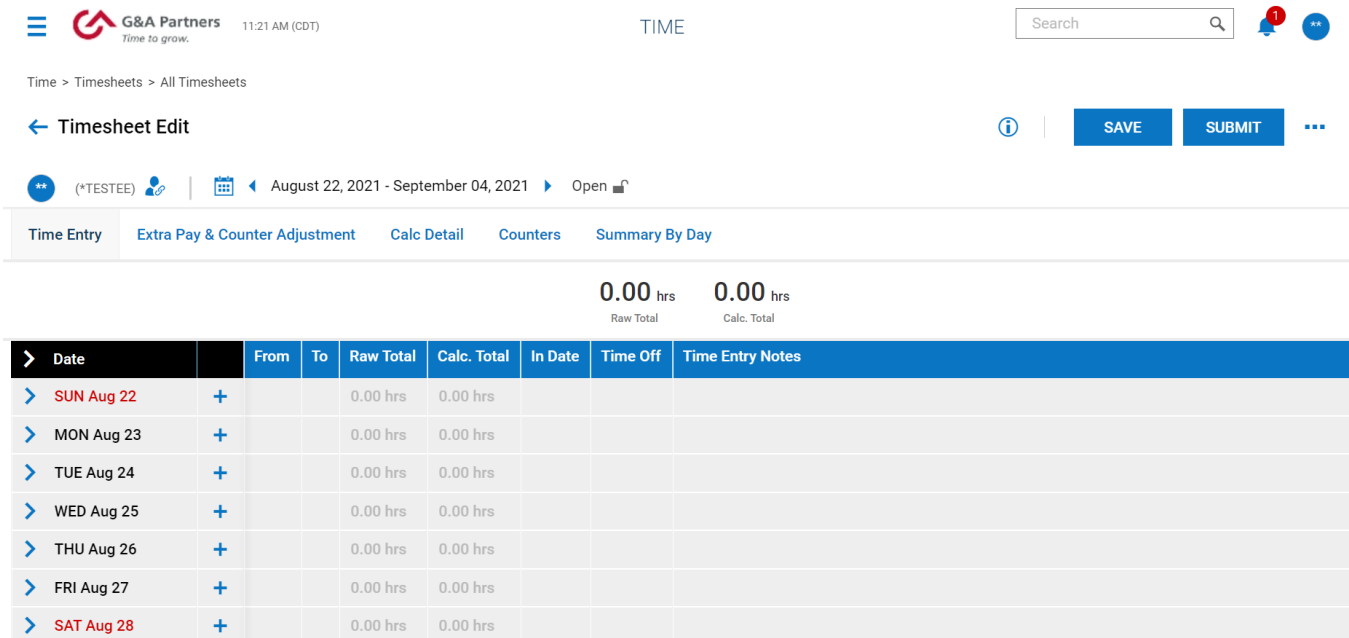
Page Total 1

4. Click the Edit icon on the row of the employee's timesheet you want to edit.



	Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-
	Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-
	Approve	*TESTEE	*EMPLOYEE	*TEST	1	-	-

The employee's Timesheet Edit screen will display.



TIME

Search

Time > Timesheets > All Timesheets

← Timesheet Edit

SAVE SUBMIT

(\*TESTEE) | August 22, 2021 - September 04, 2021



Time Entry | Extra Pay & Counter Adjustment | Calc Detail | Counters | Summary By Day









0.00 hrs Raw Total    0.00 hrs Calc. Total

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Time Entry Notes
SUN Aug 22	+		0.00 hrs	0.00 hrs			
MON Aug 23	+		0.00 hrs	0.00 hrs			
TUE Aug 24	+		0.00 hrs	0.00 hrs			
WED Aug 25	+		0.00 hrs	0.00 hrs			
THU Aug 26	+		0.00 hrs	0.00 hrs			
FRI Aug 27	+		0.00 hrs	0.00 hrs			
SAT Aug 28	+		0.00 hrs	0.00 hrs			



5. Make your edit(s).

If ...	Then ...
You want to edit the “From” or “To field.	Click within the field and enter the time for that day.
You want to add additional rows.	1. Click the Add Rows  icon. 2. Enter the time.
You want to remove a row.	Click the Delete  icon.
You want to delete a time entry from the employee’s timesheet.	Click the Delete icon for the appropriate date, see screenshot below.

> Date		From	To	Raw Total	Calc. Total	In Date	Time Off	Time Entry Notes
> SUN Aug 8				0.00 hrs	0.00 hrs			
✓ MON Aug 9		e 07:00 am	e 11:00 am	4.00	4.00	MON Aug 9 ▾	▾	
		e 11:00 am	e 12:00 pm	1.00	1.00	MON Aug 9 ▾	▾	
		e 12:00 pm	>> e 04:00 am	16.00	16.00	MON Aug 9 ▾	▾	
				21.00 hrs	21.00 hrs			

6. After completing your edits, click Save.




## Process Timesheets

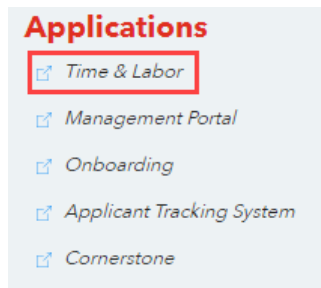
Processing timesheets is a crucial function to assure that employees are paid accurately and timely. This job aid will outline the steps on how to approve and reject timesheets.

Follow the below steps to approve timesheets.

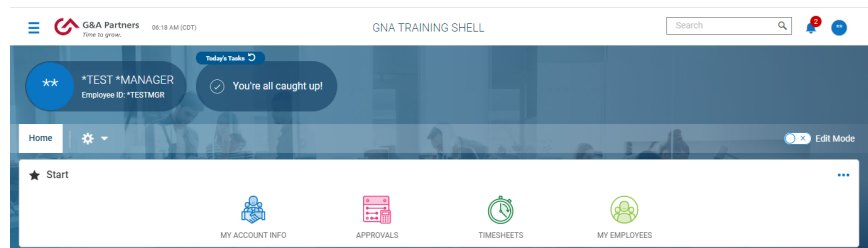
1. Log into WorkSight.

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

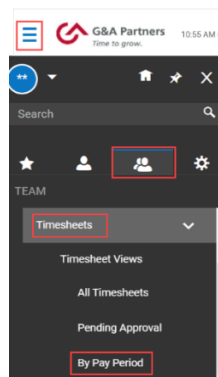
2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.




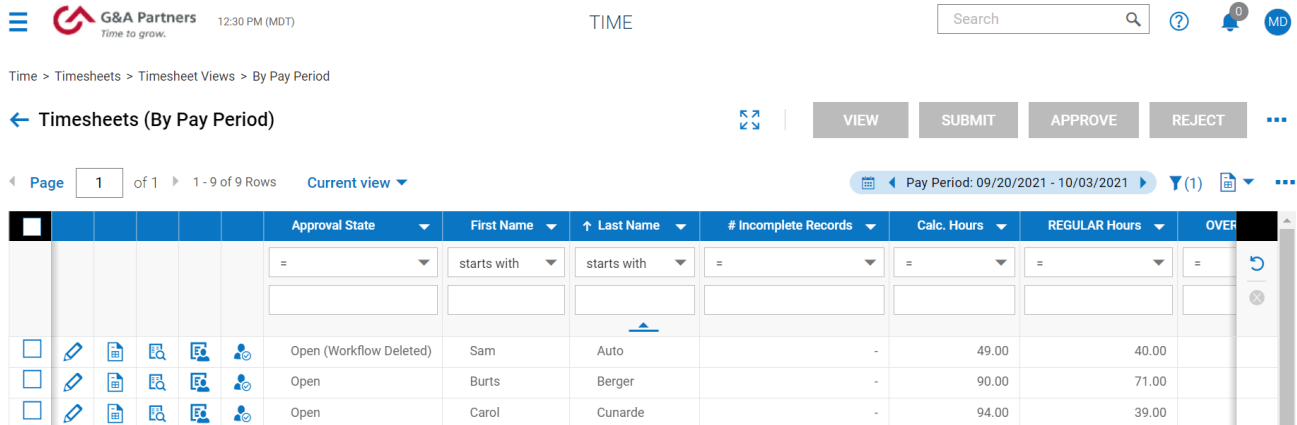
The TLM dashboard will display.



3. Navigate to Team > Timesheets > “By Pay Period” via the Side menu.



 From timesheets “By Pay Period,” you will see timesheets for a specified pay period range and can view, edit, approve, and reject timesheets for your assigned employees.




Time > Timesheets > Timesheet Views > By Pay Period

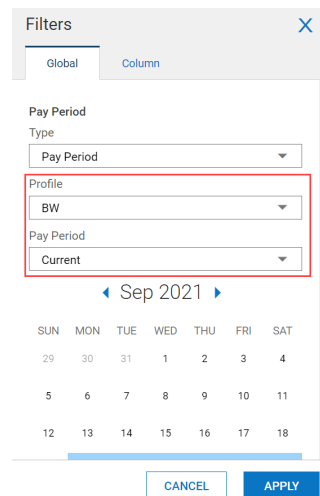
← Timesheets (By Pay Period) [VIEW] [SUBMIT] [APPROVE] [REJECT] ...

Page 1 of 1 1 - 9 of 9 Rows Current view

Pay Period: 09/20/2021 - 10/03/2021 (1)

	Approval State	First Name	Last Name	# Incomplete Records	Calc. Hours	REGULAR Hours	OVER
	Open (Workflow Deleted)	Sam	Auto	-	49.00	40.00	
	Open	Burts	Berger	-	90.00	71.00	
	Open	Carol	Cunarde	-	94.00	39.00	

 The current pay period is the default view. If you want to select a different pay period, click on the filters box, select the “Pay Period” and/or “Profile”, then click Apply.



Filters

Global Column

Pay Period

Type  
Pay Period

Profile  
BW

Pay Period  
Current

◀ Sep 2021 ▶

SUN MON TUE WED THU FRI SAT

29 30 31 1 2 3 4

5 6 7 8 9 10 11






12 13 14 15 16 17 18

CANCEL APPLY



#### 4. Review and process the timesheets.

[VIEW] [SUBMIT] [APPROVE] [REJECT] ...



Action	Description/Function
View	<p>The View action allows you to view and/or edit an employee’s timesheet. Editing requires a security profile with editing capability.</p> <ol style="list-style-type: none"> <li>1. Select the timesheet(s) you want to Approve by clicking in the checkbox on the row of each employee.</li> <li>2. Click the View button. This will open the Timesheet Edit page.</li> <li>3. To approve, click the Approve button.</li> </ol> <p> If you select more than one timesheet, advance to the next employee by clicking the right arrow.</p> <p style="text-align: center;"><a href="#">← Timesheet Edit</a></p> <p style="text-align: center;">◀ 1 of 3 ▶  Sam Auto (L08870) </p>
Submit	<p>The Submit action will place the timesheets into a ‘Submitted’ approval state.</p> <p> If you are not the approving manager but have a hierarchy of approving managers, this option may be used to indicate the timesheets are ready to be approved.</p> <ol style="list-style-type: none"> <li>1. Select the timesheet(s) you want to Submit for approval by clicking in the checkbox on the row of each employee.</li> <li>2. Click the Submit button. This will open the “Submit timesheet(s) for Approval” dialog box.</li> </ol> <p> Comments are optional.</p> <ol style="list-style-type: none"> <li>3. Click the Submit button.</li> </ol>



<p>Approve</p>	<p>The Approve action will place the timesheet into an 'Approved (PayPrep Ready)' approval state.</p> <ol style="list-style-type: none"> <li>1. Select the timesheet(s) you want to <b>Approve</b> by clicking in the checkbox on the row of each employee.</li> <li>2. Click the Submit button. This will open the "Approve timesheet(s)?" dialog box.</li> </ol> <p> Comments are optional.</p> <ol style="list-style-type: none"> <li>3. Click the Approve button.</li> </ol>
<p>Reject</p>	<p>The Reject action will place the timesheet(s) in an 'Open (Rejected)' state. This enables the timesheet to be edited and submitted or approved again.</p> <p> All rejections of requests require comments.</p> <ol style="list-style-type: none"> <li>1. Select the timesheet(s) you want to reject by clicking in the checkbox on the row of each employee.</li> <li>2. Click the Reject button. This will open the "Reject timesheet(s)" dialog box.</li> <li>3. Enter comments.</li> <li>4. Click the Reject button.</li> </ol>
<p>More Options</p>	<p>The More Options icon provides additional options including Print, Refresh, and Delete.</p>




## Absence Management

Absence Management is the process of managing your employees' time-off in SaaShr, G&A Partners' Time and Labor Management system. SaaShr allows you to easily view and approve/reject time-off requests, as well as view time-off counts and accrual history in detail.

This chapter provides information on how to:

- View Employee PTO Balances and Accruals
- View and Process Pending Approvals
- Add Time-Off to an Employee's Timesheet
- Process Time-Off Requests

 The menu options available to you to approve or reject timesheets depends on your individual security rights. The specific time-off types (ex. PTO, Sick, Vacation) will vary based upon your company configuration.





## View Employee's Time Off Balances and Accruals

Within Time and Labor Management (TLM), you can view and process time-off requests as well as view time-off counts and accrual history in detail.

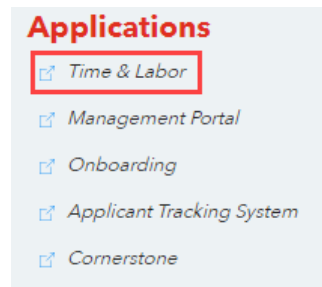
Follow the steps below to view an employee's time off balances and accruals.

1. Log into WorkSight.

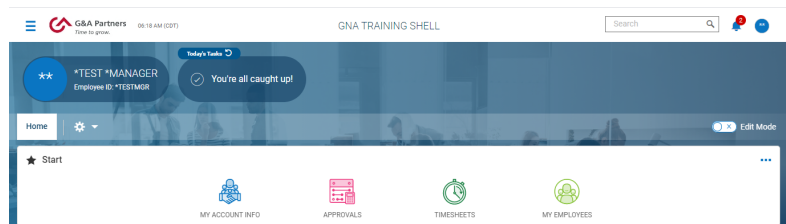


If you are logged into WorkSight but not TLM, skip to step 2. If you are already logged into TLM, skip to step 3.

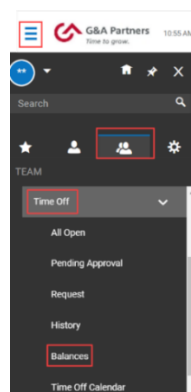
2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.



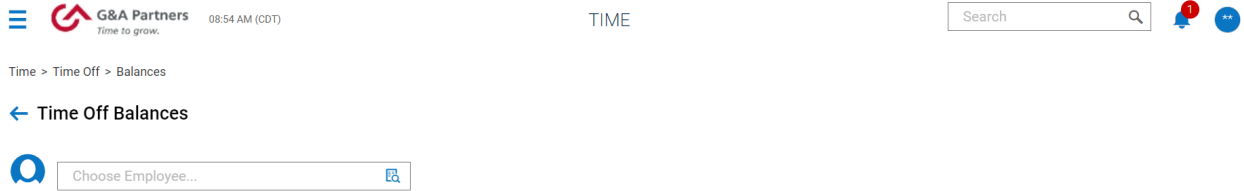
The TLM dashboard will display.




3. Navigate to Team > Time Off > Balances via the Side menu.

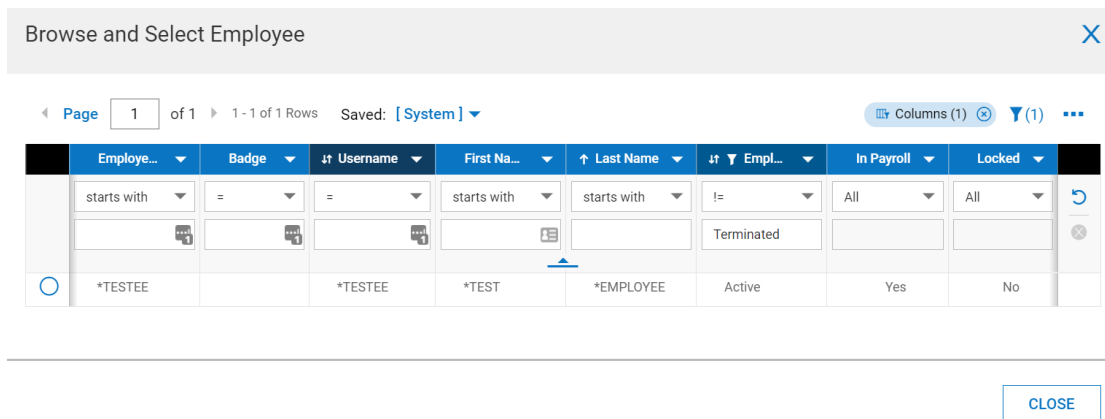


The Time Off Balances form will display.

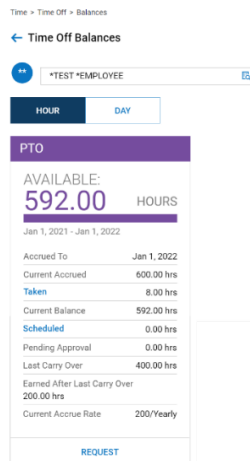


4. Enter the employee's name or ID # in the Choose Employee field.

 To search for an employee click on the Browse icon at the end of the Choose Employee field then click inside the radio button adjacent to the employee's name.



The time off balance for the employee selected will display.



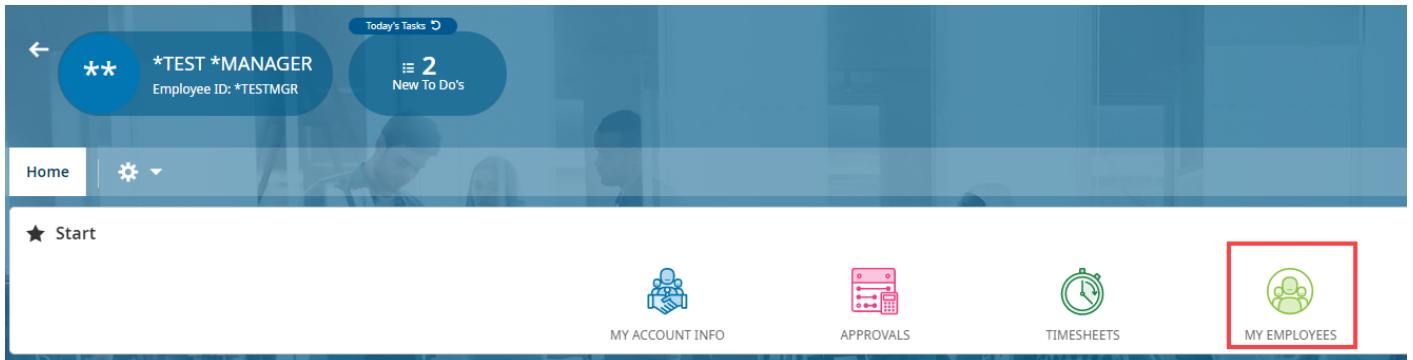
5. To view the next employee, repeat step 4.



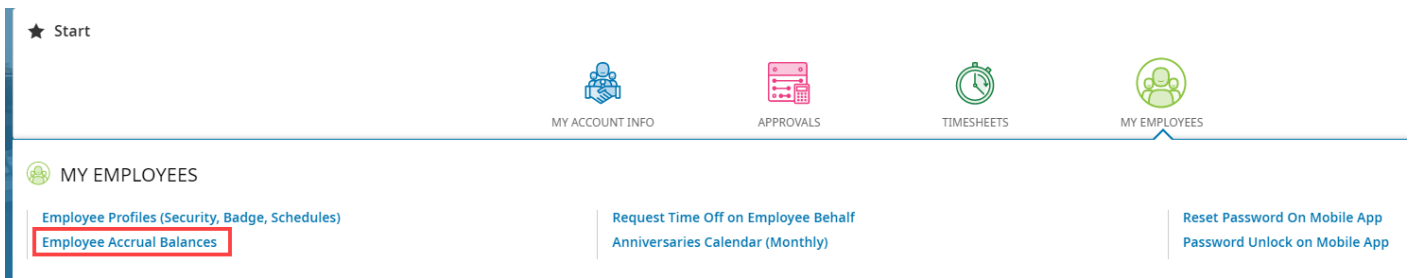
## Accrual Balances

The list of employee accrual balances by the type of time-off can be seen on the Accrual Balances report.

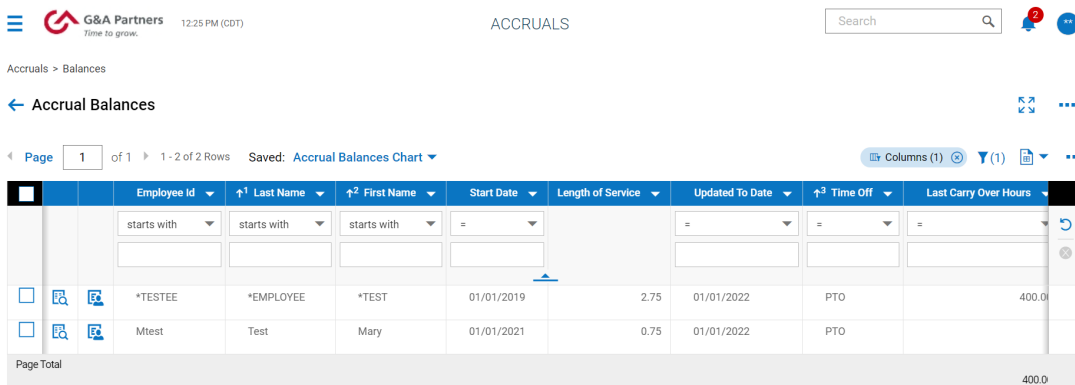
1. Click the My Employees Widget on the TLM Dashboard.



2. Click the “Employee Accrual Balances” link.



The Accruals for your employees will display.



The screenshot shows the 'ACCUALS' report page. The table displays the following data:

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours
*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.75	01/01/2022	PTO	400.0
Mtest	Test	Mary	01/01/2021	0.75	01/01/2022	PTO	

Page Total: 400.0



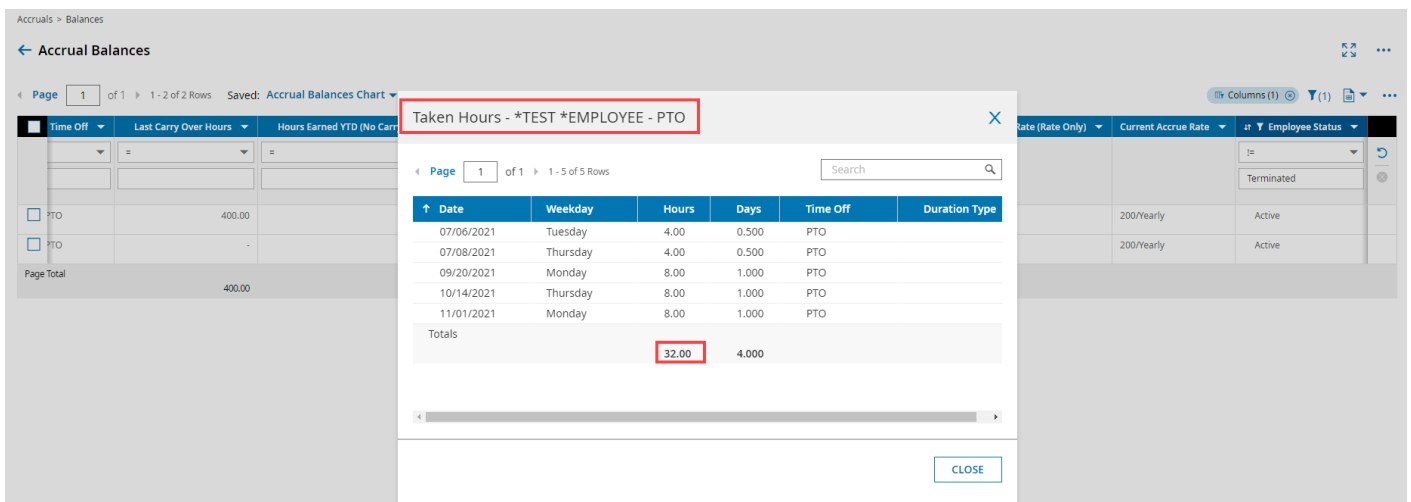
⚠️ Accruals are an ongoing calculation, which includes consideration to:

- Beginning time-off type balance
- Time based accrual rules (ongoing)
- Time-off taken (as needed)
- Manual adjustments (as needed)
- Carry over rules (as defined)

3. Two hyperlinks will show within this report for hours/time taken for the year (in the past) as well as scheduled time (in the future). Both are shown as Year-to-Date (YTD) as the policy shows information based on the policies' anchor date.

Hours Earned YTD	Hours Taken YTD	Hours Scheduled
=	=	=
600.00	32.00	-
200.00	11.00	-
800.00	43.00	

Clicking on a link will open a pop-up window with more detailed information.



The screenshot shows a software interface for 'Accruals > Balances'. A table titled 'Accrual Balances' is visible in the background. A pop-up window titled 'Taken Hours - \*TEST \*EMPLOYEE - PTO' is open, displaying a detailed table of PTO hours taken. The table has columns for Date, Weekday, Hours, Days, Time Off, and Duration Type. The data rows are as follows:

Date	Weekday	Hours	Days	Time Off	Duration Type
07/06/2021	Tuesday	4.00	0.500	PTO	
07/08/2021	Thursday	4.00	0.500	PTO	
09/20/2021	Monday	8.00	1.000	PTO	
10/14/2021	Thursday	8.00	1.000	PTO	
11/01/2021	Monday	8.00	1.000	PTO	
Totals		32.00	4.000		

The 'Hours' column in the Totals row is highlighted with a red box. A 'CLOSE' button is located at the bottom right of the pop-up window.



## Accrual History

The Accrual History can be filtered to show the detailed accrual activity (transaction type) for a given employee. By default, the system filter for “Date Added” = [Today]. The “Filter Range” can be expanded (ex: Date Added = [This Year]) to show more data.


1. Click the Accrual History icon for the employee you want to view.

← Accrual Balances ↔ ...

Page 1 of 1 | 1 - 2 of 2 Rows | Saved: Accrual Balances Chart | Columns (1) | (1) | ...

	Employee Id	↑ <sup>1</sup> Last Name	↑ <sup>2</sup> First Name	Start Date	Length of Service	Updated To Date	↑ <sup>3</sup> Time Off	Last Carry Over Hours
	starts with	starts with	starts with	=		=	=	=
<input type="checkbox"/>	*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.75	01/01/2022	PTO	400.00
<input type="checkbox"/>	Mtest	Test	Mary	01/01/2021	0.75	01/01/2022	PTO	

The Accrual History will display.

 **G&A Partners** 12:53 PM (CDT) ACCRUALS  🔔 2

Accruals

← Accruals History ↔

Employee: \*TEST \*EMPLOYEE  
Time Off: PTO

Page 1 of 1 | 1 - 12 of 12 Rows | Saved: [System] | (0) | ...


	↓ Added	Transaction Type	Range	Hours Authorized	Hours Taken	Days Authorized	Days Taken
	=	=		=	=	=	=
	07/07/2021 11:53a	Time Entry	07/08/2021	-	4.00	-	0.50
	07/07/2021 11:53a	Time Entry	07/06/2021	-	4.00	-	0.50
	05/17/2021 01:48p	Manual Accruals Execution	01/01/2021 - 01/01/2022	200.00	-	25.00	-
	05/17/2021 01:48p	Carry Over Rule	01/01/2021	400.00	-	50.00	-
	05/17/2021 01:48p	Carry Over Rule Prev Year Adjustment	01/01/2021	-400.00	-	-50.00	-



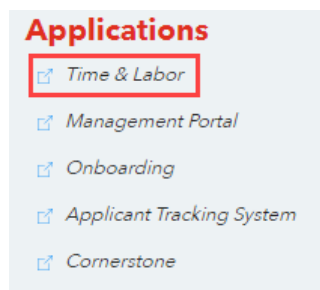
## View and Process Pending Approvals

To review details of time-off submissions and process time-off requests (approve or reject) by your direct reports in one view, follow the steps listed below.

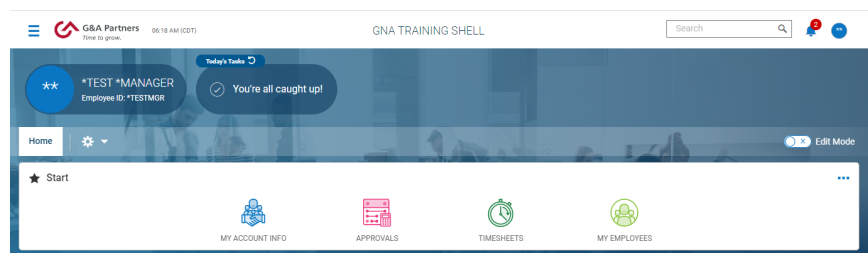
**1. Log into WorkSight.**

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

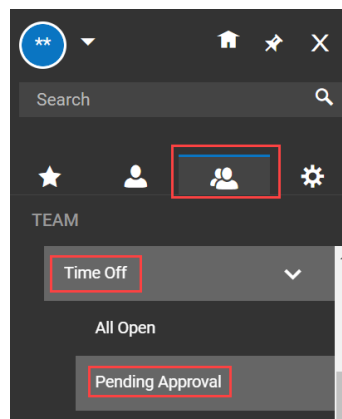
**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



The TLM dashboard will display.



**3. Navigate to Team > Time Off > Pending Approval via the Side menu.**



All pending approvals will display.





Time > Time Off > Pending Approval

← Pending Approval APPROVE REJECT

Page 1 of 1 1 - 1 of 1 Rows Saved: Managers - 1 Time Off Approvals (0)

Employee Id	Username	First Name	Last Name	Requested Weekday	Date Requested	From	To
*TESTEE	*TESTEE	*TEST	*EMPLOYEE	Friday	10/01/2021	-	

 Upon submitting a time-off request, an “Approve/Reject Time Off Request” will route to your mailbox.

Icon	Function
	<b>View Time Off Counts</b> displays the time off type, accrued to, current accrued, taken, current balance, scheduled, and pending approval for the selected employee.
	<b>Employee Information</b> displays the employee profile.
	<b>Review/Modify Time Off Request</b> allows you to view and/or make changes to an employee’s time off request i.e., change time off type, request type, and date.
	<b>Open Timesheet</b> opens to the employee’s Timesheet Edit page where you can view and or edit their current timesheet.

4. Click the checkbox on the row of the employee’s pending approval that you want to process.

Time > Time Off > Pending Approval

← Pending Approval APPROVE REJECT

Page 1 of 1 1 - 1 of 1 Rows Saved: Managers - 1 Time Off Approvals (0)

Employee Id	Username	First Name	Last Name	Requested Weekday	Date Requested	From	To
<input checked="" type="checkbox"/>	*TESTEE	*TESTEE	*TEST	*EMPLOYEE	Friday	10/01/2021	-



If ...	Then ...
You are approving the time-off request.	<ol style="list-style-type: none"> <li>1. Click the Approve button. This will open the “Approve timesheet(s)?” dialog box.</li> <li>⚠ Comments are optional.</li> <li>2. Click the Approve button.</li> </ol>
You are rejecting the time-off request.	<ol style="list-style-type: none"> <li>1. Click the Reject button. This will open the Reject Time Off Request(s)? dialog box.</li> <li>2. Enter reject reason(s).</li> <li>⚠ All rejections require comments.</li> <li>3. Click the Reject button.</li> </ol>

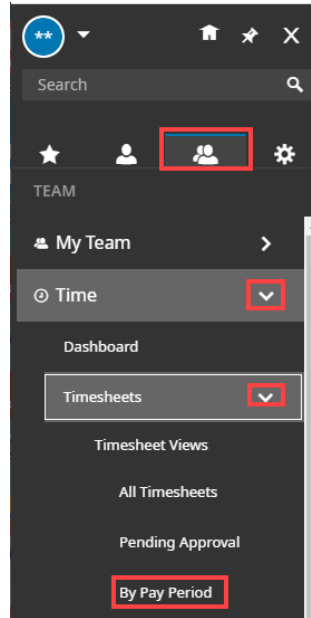




# Add Time-Off to an Employee's Timesheet

Follow the steps below to add time-off an employee's timesheet.

1. Navigate to My Team > Time > Timesheets > By Pay Period via the Side menu.



Timesheets (By Pay Period) will display.

G&A Partners 01:28 PM (Central) TIME




Time > Timesheets > Timesheet Views > By Pay Period

← Timesheets (By Pay Period)

Page 1 of 1 1 - 3 of 3 Rows Current view

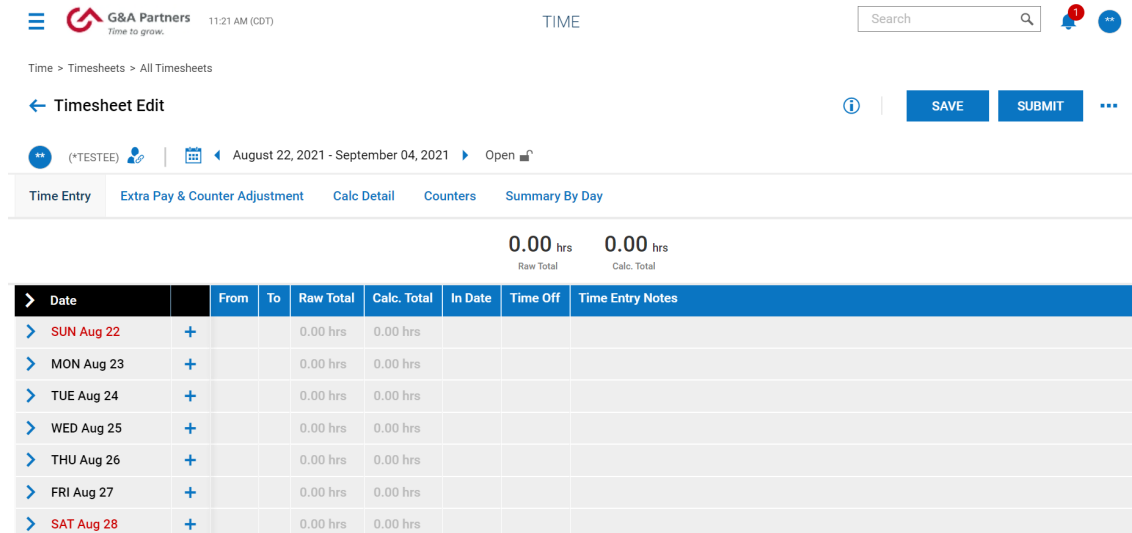
Permission	Approval State	Employee Id	Last Name	First Name	# Incomplete...	Calc. Hours	Calc. Work H...	Calc. Time Of...	OVERTIME H...	Employee ...
Approve	Open	*TESTEE	*EMPLOYEE	*TEST	-	8.00	-	8.00	-	Active
Approve	Open	*JobCosting	JobCosting	Jill	-	-	-	-	-	Active
Approve	Open	Mtest	Test	Mary	-	-	-	-	-	Active
Page Total						8.00		8.00		

2. Click the Edit icon on the row of the employee's timesheet you want to edit.

	Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-	-
	Approve	*TESTEE	*EMPLOYEE	*TEST	-	-	-	-
	Approve	*TESTEE	*EMPLOYEE	*TEST	-	1	-	-




### Timesheet Edit will display.

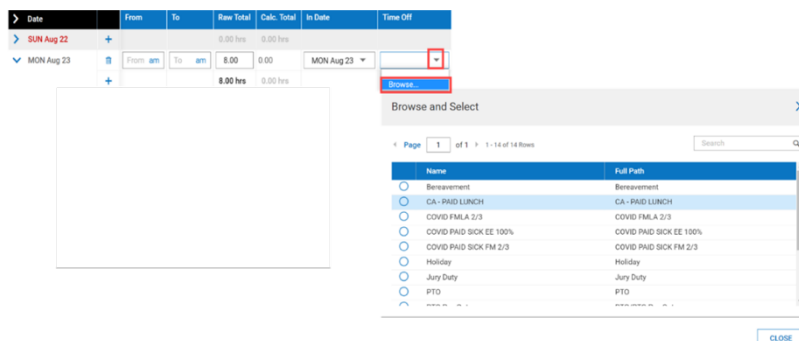


3. Click within the Raw Total's column and enter the bulk hours.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Time Entry Notes
SUN Aug 22	+		0.00 hrs	0.00 hrs			
MON Aug 23	From am	To am	8.00	0.00	MON Aug 23		
	+		8.00 hrs	0.00 hrs			

 Entering “From” and “To” time for adding time off to an employee’s timesheet is not needed; if an employee has time for that day where the employee punched, the timesheet will error if the time overlaps.

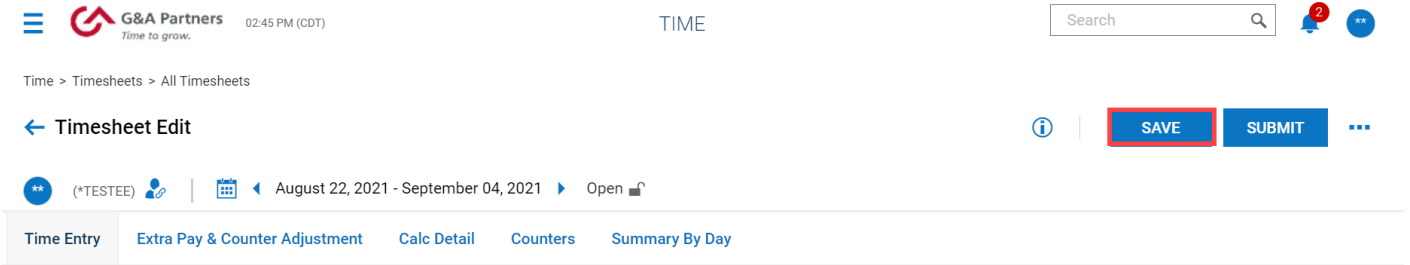
4. Click the drop-down arrow in the Time Off field, click “browse” then select a time-off type.




To add additional rows, click the “Add Rows” button.



### 5. Click the Save button.



Time > Timesheets > All Timesheets

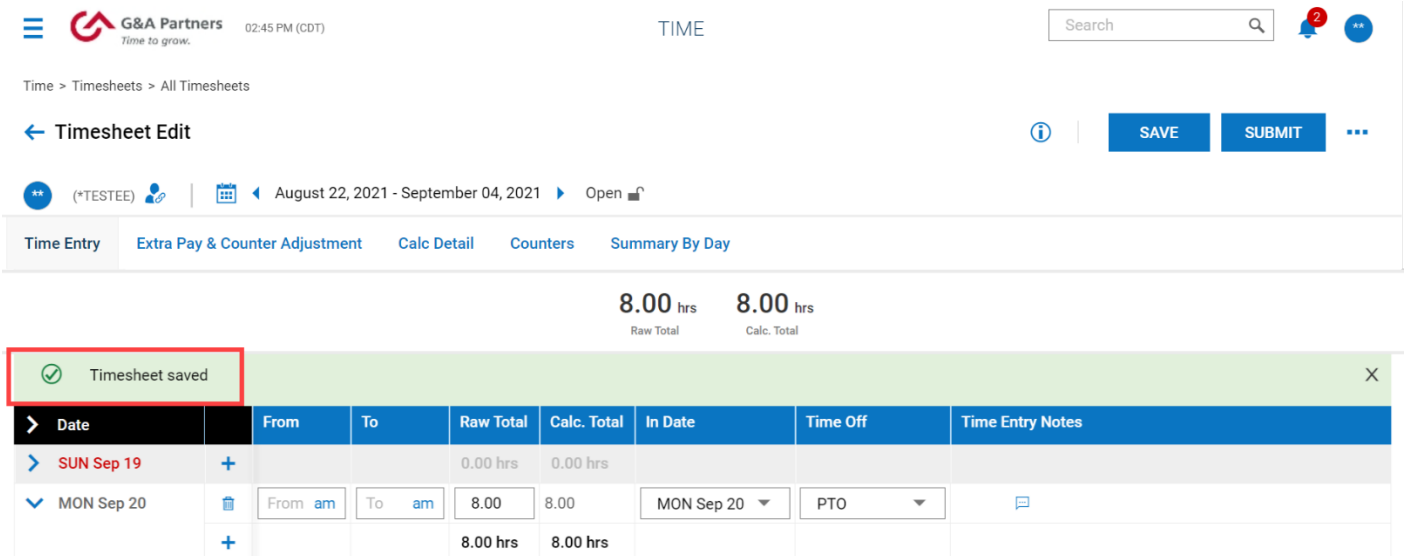
← Timesheet Edit

Time Entry | **Extra Pay & Counter Adjustment** | Calc Detail | Counters | Summary By Day

0.00 hrs Raw Total    0.00 hrs Calc. Total

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Time Entry Notes
SUN Aug 22			0.00 hrs	0.00 hrs			
MON Aug 23	From am	To am	8.00	0.00	MON Aug 23	PTO	
			8.00 hrs	0.00 hrs			

A confirmation will display stating the timesheet has been saved.



Time > Timesheets > All Timesheets

← Timesheet Edit

Time Entry | Extra Pay & Counter Adjustment | Calc Detail | Counters | Summary By Day

8.00 hrs Raw Total    8.00 hrs Calc. Total

✔ Timesheet saved X

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Time Entry Notes
SUN Sep 19			0.00 hrs	0.00 hrs			
MON Sep 20	From am	To am	8.00	8.00	MON Sep 20	PTO	
			8.00 hrs	8.00 hrs			




## Process Time-Off Requests

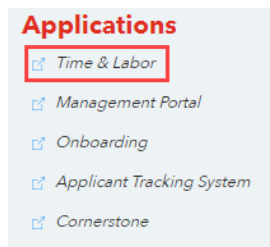
When an employee submits a time-off request, it will route to the Manager's mailbox.

Follow the steps below to approve a time-off request.

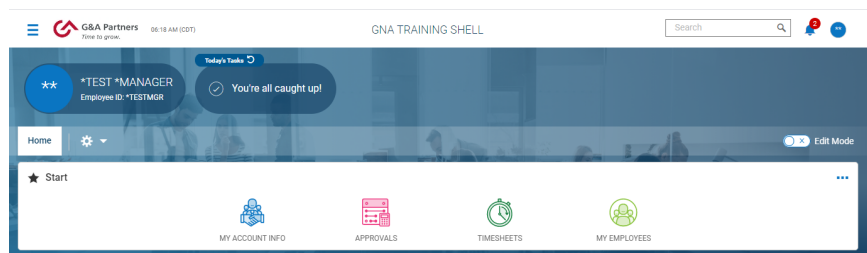
1. Log into WorkSight.

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.



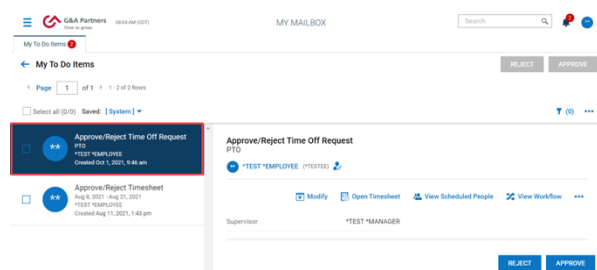
The TLM dashboard will display.




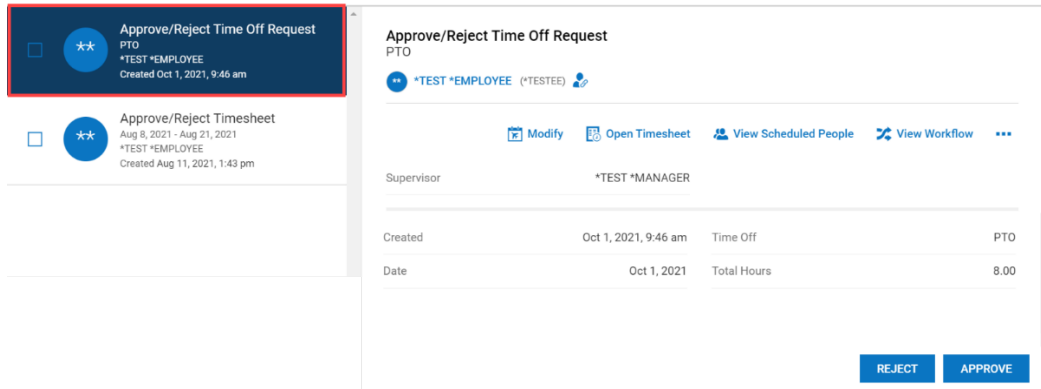
3. Click the "My Mailbox" icon.





The Mailbox will open.



 The first item in your Mailbox is highlighted by default. You can click on any item to view details which will display to the right. Use the scroll bar to the left to view the details in the time-off request.



If ...	Then ...
You are approving the time-off request.	<ol style="list-style-type: none"> <li>1. Click the Approve button. This will open the “Are you sure you want to approve this time off?” dialog box.   Comments are optional.</li> <li>2. Click the Approve button.</li> </ol>
You are rejecting the time-off request.	<ol style="list-style-type: none"> <li>1. Click the Reject button. This will open the Reject Time Off Request dialog box.</li> <li>2. Enter reject reason(s).   All rejections of requests require comments.</li> <li>3. Click the Reject button.</li> </ol>

After processing the time-off request, it will no longer appear in your mailbox.



# Reporting

SaaShr offers extensive reporting options and capabilities for you to gather and present labor-related data in a variety of ways.

Since all reports follow similar creation procedures, general guidelines that apply to all reports are provided in this section as well as the following items:

- Viewing SaaShr Reports
- Report Settings
  - Configure Report Display
  - Columns
  - Change Column Order
  - Add Columns
  - Remove Columns
  - Search for Data Items
- Data Filters
- Save a Report
- Export a Report
- Print a Report
- Refresh Report Data
- My Saved Reports




## View SaaShr Reports

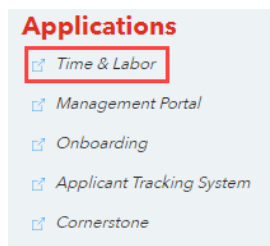
SaaShr reports are typically found in their respective functional areas. For example, time related reports are a part of the “Time” module, accrual reports are part of the “Accruals” module, and schedule reports are part of the ‘Schedule’ module.

Follow the steps below to access “My Reports.”

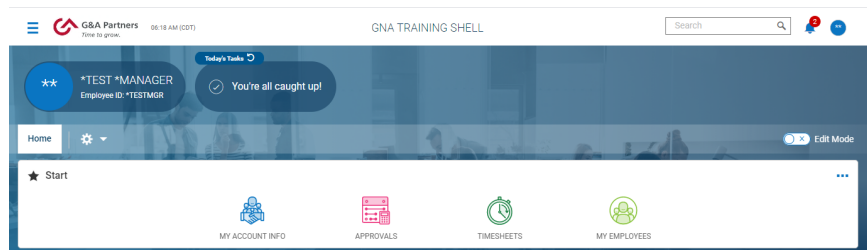
**1. Step 1.** Log into WorkSight.

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

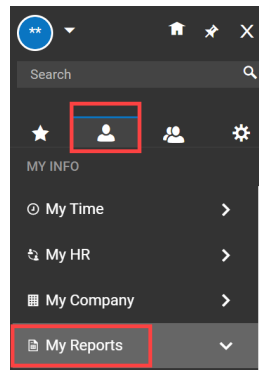
**2.** Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.



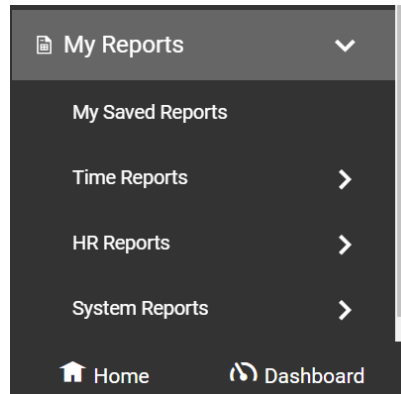
The TLM dashboard will display.



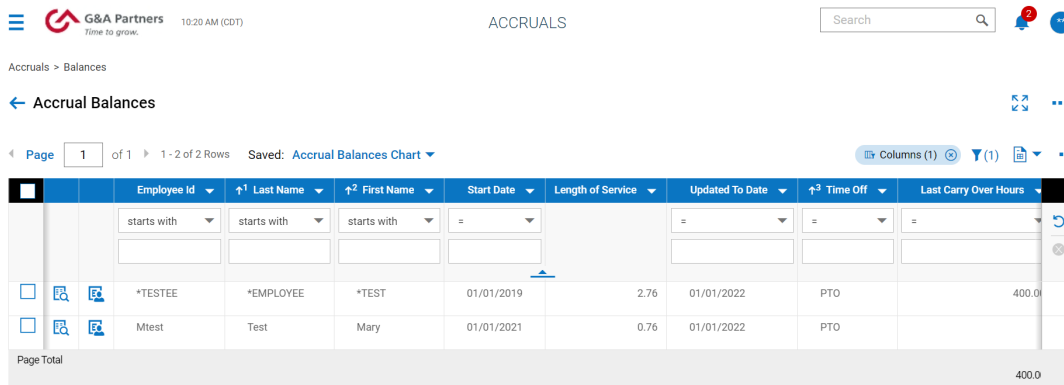
**3.** Navigate to My Info > My Reports via the Side menu.




The reports are grouped to show your saved reports, which are reports configured specifically for you/others, as well as reports by functional area (Time, HR, and System) to which you have access.

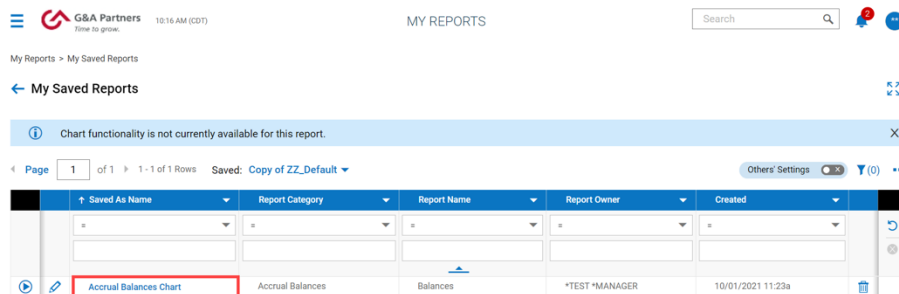


#### 4. Select a report to view.



	Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours
	*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.76	01/01/2022	PTO	400.0
	Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO	
Page Total								400.0

 If you select “My Saved Reports,” a list of the reports you have saved will display. Click on your desired report.



	Saved As Name	Report Category	Report Name	Report Owner	Created
	Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/01/2021 11:23a



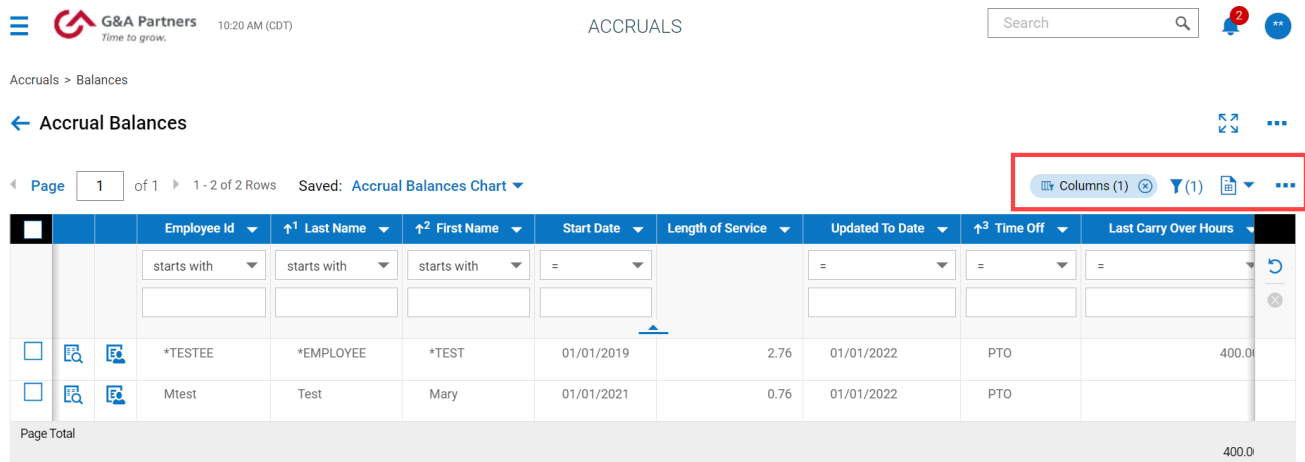


## Report Settings

Once a report is selected, it will run with either the system default report settings or any personal default settings you may have defined. The report will display in a tabular format. Once the report displays, there are several ways the report can be configured.

### Configuring Report Display

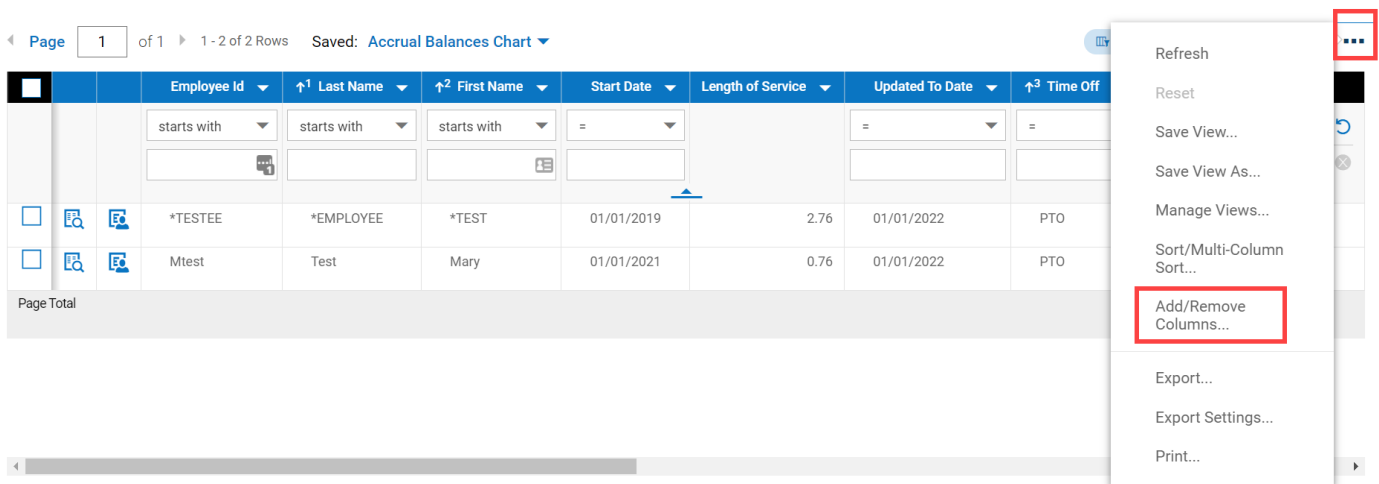
The most common way to configure the display of the report is by changing the columns or changing the report filters. These are both managed using the toolbar above and to the right of the report data table.



The screenshot shows the 'ACCUALS' report interface. At the top, there is a search bar and notification icons. Below the header, the breadcrumb 'Accruals > Balances' is visible. The main section is titled '← Accrual Balances'. A toolbar above the table includes a 'Columns (1)' button, a filter icon, and a refresh icon. The table has columns for Employee Id, Last Name, First Name, Start Date, Length of Service, Updated To Date, Time Off, and Last Carry Over Hours. Two rows of data are shown: one for '\*TESTEE' and another for 'Mtest'. A 'Page Total' row at the bottom shows a total of 400.0.

### Column Selection

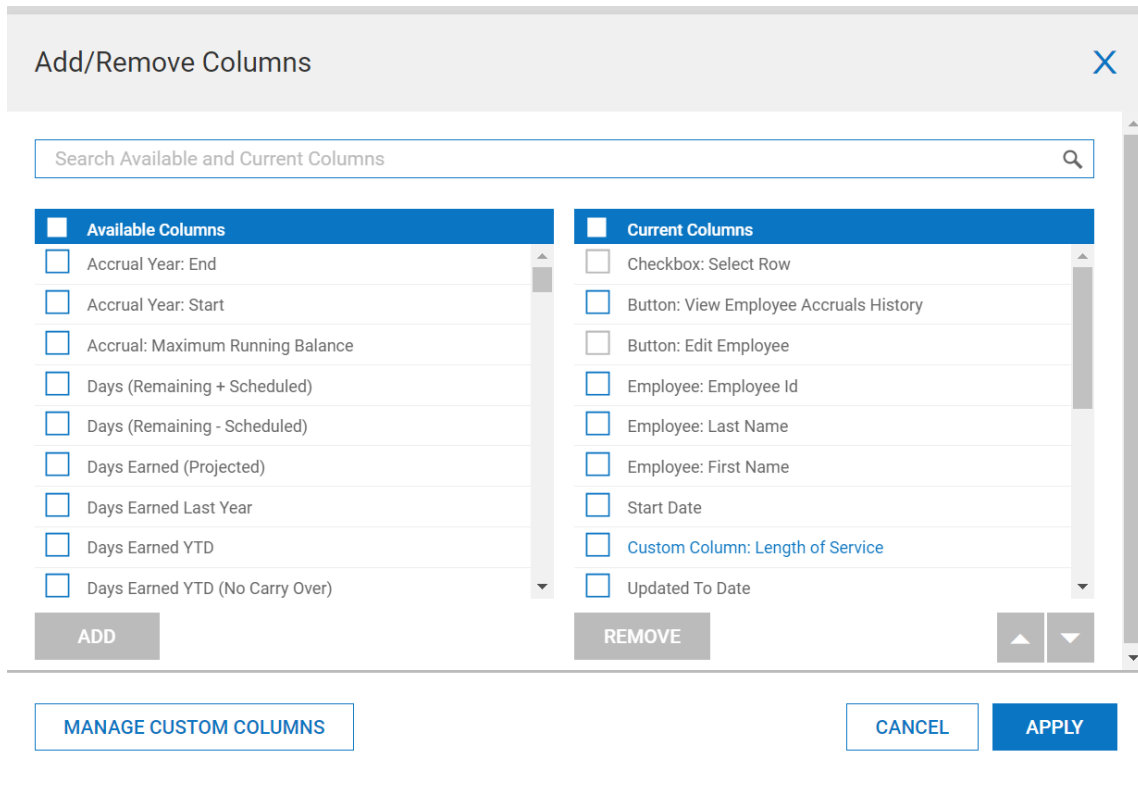
Column Selection can most easily be accomplished using the 'Actions' menu [...] and choosing "Add/Remove Columns."



This screenshot is similar to the previous one but shows the 'Actions' menu (indicated by a red box in the top right) open. The menu options include Refresh, Reset, Save View..., Save View As..., Manage Views..., Sort/Multi-Column Sort..., Add/Remove Columns... (highlighted with a red box), Export..., Export Settings..., and Print... The table data remains the same as in the previous screenshot.



The “Add/Remove Columns” selector will display.



Column availability is based upon your security and the underlying data used in the report. Different reports will have different columns available for display.

The columns currently on the report display are on the right of the panel in the ‘Current Columns’ list, with the leftmost report column showing at the top of the list and the rightmost report column showing at the bottom of the list.

To change the column display you may change the column order, add a column to the report, remove a column from the report, or search for data items.



## Change Column Order

1. Click one or more checkboxes in the 'Current Column' list.

Add/Remove Columns
✕

Available Columns	Current Columns
<input type="checkbox"/> Accrual Year: End	<input type="checkbox"/> Checkbox: Select Row
<input type="checkbox"/> Accrual Year: Start	<input type="checkbox"/> Button: View Employee Accruals History
<input type="checkbox"/> Accrual: Maximum Running Balance	<input type="checkbox"/> Button: Edit Employee
<input type="checkbox"/> Days (Remaining + Scheduled)	<input type="checkbox"/> Employee: Employee Id
<input type="checkbox"/> Days (Remaining - Scheduled)	<input checked="" type="checkbox"/> Employee: Last Name
<input type="checkbox"/> Days Earned (Projected)	<input checked="" type="checkbox"/> Employee: First Name
<input type="checkbox"/> Days Earned Last Year	<input type="checkbox"/> Start Date
<input type="checkbox"/> Days Earned YTD	<input type="checkbox"/> Custom Column: Length of Service
<input type="checkbox"/> Days Earned YTD (No Carry Over)	<input type="checkbox"/> Updated To Date
<input type="checkbox"/> Days Remaining	<input type="checkbox"/> Time Off

ADD
REMOVE

MANAGE CUSTOM COLUMNS
CANCEL
APPLY


2. Click the up/down icons to move the selected column(s) to the left (click up) or to the right (click down).

Add/Remove Columns
✕

Available Columns	Current Columns
<input type="checkbox"/> Accrual Year: End	<input type="checkbox"/> Checkbox: Select Row
<input type="checkbox"/> Accrual Year: Start	<input type="checkbox"/> Button: View Employee Accruals History
<input type="checkbox"/> Accrual: Maximum Running Balance	<input type="checkbox"/> Button: Edit Employee
<input type="checkbox"/> Days (Remaining + Scheduled)	<input type="checkbox"/> Employee: Employee Id
<input type="checkbox"/> Days (Remaining - Scheduled)	<input checked="" type="checkbox"/> Employee: Last Name
<input type="checkbox"/> Days Earned (Projected)	<input checked="" type="checkbox"/> Employee: First Name
<input type="checkbox"/> Days Earned Last Year	<input type="checkbox"/> Start Date
<input type="checkbox"/> Days Earned YTD	<input type="checkbox"/> Custom Column: Length of Service
<input type="checkbox"/> Days Earned YTD (No Carry Over)	<input type="checkbox"/> Updated To Date
<input type="checkbox"/> Days Remaining	<input type="checkbox"/> Time Off

ADD
REMOVE

MANAGE CUSTOM COLUMNS
CANCEL
APPLY

 The column(s) will move based on the direction selected.



## Add Columns to a Report

1. Select the data item(s) in the Available Columns list, then click the “ADD” button.

Add/Remove Columns
✕

Available Columns	Current Columns
<input type="checkbox"/> Days (Remaining - Scheduled)	<input type="checkbox"/> Employee: Last Name
<input type="checkbox"/> Days (Remaining - Scheduled)	<input type="checkbox"/> Employee: First Name
<input type="checkbox"/> Days Earned (Projected)	<input type="checkbox"/> Checkbox: Select Row
<input type="checkbox"/> Days Earned Last Year	<input type="checkbox"/> Button: View Employee Accruals History
<input type="checkbox"/> Days Earned YTD	<input type="checkbox"/> Button: Edit Employee
<input type="checkbox"/> Days Earned YTD (No Carry Over)	<input type="checkbox"/> Employee: Employee Id
<input type="checkbox"/> Days Remaining	<input type="checkbox"/> Start Date
<input type="checkbox"/> Days Scheduled	<input type="checkbox"/> Custom Column: Length of Service
<input checked="" type="checkbox"/> Days Scheduled This Year	<input type="checkbox"/> Updated To Date
<input type="checkbox"/> Days Taken Last Year	<input type="checkbox"/> Time Off
<input checked="" type="checkbox"/> Days Taken YTD	

ADD
REMOVE

MANAGE CUSTOM COLUMNS
CANCEL
APPLY

2. The selected column(s) will be added to the report as the rightmost column and will be listed at the bottom of the ‘Current Columns’ list.

Add/Remove Columns
✕

Available Columns	Current Columns
<input type="checkbox"/> Days (Remaining - Scheduled)	<input type="checkbox"/> Hours Earned YTD (No Carry Over)
<input type="checkbox"/> Days (Remaining - Scheduled)	<input type="checkbox"/> Hours Earned YTD
<input type="checkbox"/> Days Earned (Projected)	<input type="checkbox"/> Hours Taken YTD
<input type="checkbox"/> Days Earned Last Year	<input type="checkbox"/> Hours Scheduled
<input type="checkbox"/> Days Earned YTD	<input type="checkbox"/> Hours Remaining
<input type="checkbox"/> Days Earned YTD (No Carry Over)	<input type="checkbox"/> Current Accrue Rate (Rate Only)
<input type="checkbox"/> Days Remaining	<input type="checkbox"/> Current Accrue Rate
<input type="checkbox"/> Days Scheduled	<input type="checkbox"/> Employee: Status
<input type="checkbox"/> Days Taken Last Year	<input checked="" type="checkbox"/> Days Scheduled This Year
<input type="checkbox"/> Emp. Default: DEPARTMENT: (1)	<input checked="" type="checkbox"/> Days Taken YTD
<input type="checkbox"/> Emp. Default: DEPARTMENT: Abbrev.	

ADD
REMOVE

MANAGE CUSTOM COLUMNS
CANCEL
APPLY



3. Repeat as necessary. Click the “APPLY” button when finished. The column(s) will display on the report.


← Accrual Balances K\* K\* ...

Page 1 of 1 1 - 2 of 2 Rows Saved: Accrual Balances Chart Columns (1) (1) ...

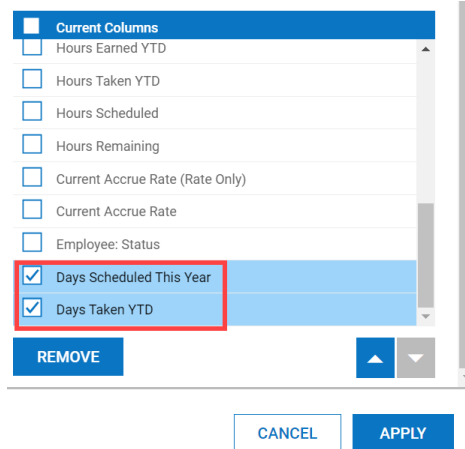
th of Service	Updated To Date	Time Off	Last Carry Over Hours	Hours Earned YTD (No Carry O...	Hours Earned YTD	Hours Taken YTD	Hours Scheduled	Hours Remaining	Current Accrue Rate (Rate Only)	Curre	
<input type="checkbox"/>	2.86	01/01/2022	PTO	400.00	200.00	600.00	32.00	-	568.00	200	200/Y
<input type="checkbox"/>	0.86	01/01/2022	PTO	-	200.00	200.00	11.00	-	189.00	200	200/Y
Page Total				400.00	400.00	800.00	43.00		757.00		



## Remove Columns from a Report

 If you have navigated away from Add/Remove Columns, click the Actions menu, and select “Add/Remove Columns before proceeding with the following steps.”

1. Select the data item(s) in the ‘Current Columns’ list.



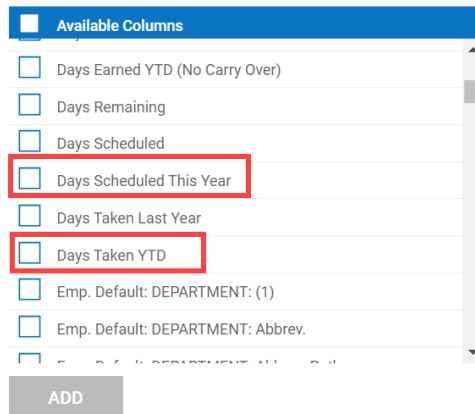
**Current Columns**

- Hours Earned YTD
- Hours Taken YTD
- Hours Scheduled
- Hours Remaining
- Current Accrue Rate (Rate Only)
- Current Accrue Rate
- Employee: Status
- Days Scheduled This Year
- Days Taken YTD

REMOVE

CANCEL APPLY

2. Click the “REMOVE” button. The selected column(s) will be removed from the report and will be put back in the ‘Available Columns’ list in alphabetical order.



**Available Columns**

- Days Earned YTD (No Carry Over)
- Days Remaining
- Days Scheduled
- Days Scheduled This Year
- Days Taken Last Year
- Days Taken YTD
- Emp. Default: DEPARTMENT: (1)
- Emp. Default: DEPARTMENT: Abbrev.
- Emp. Default: DEPARTMENT: All

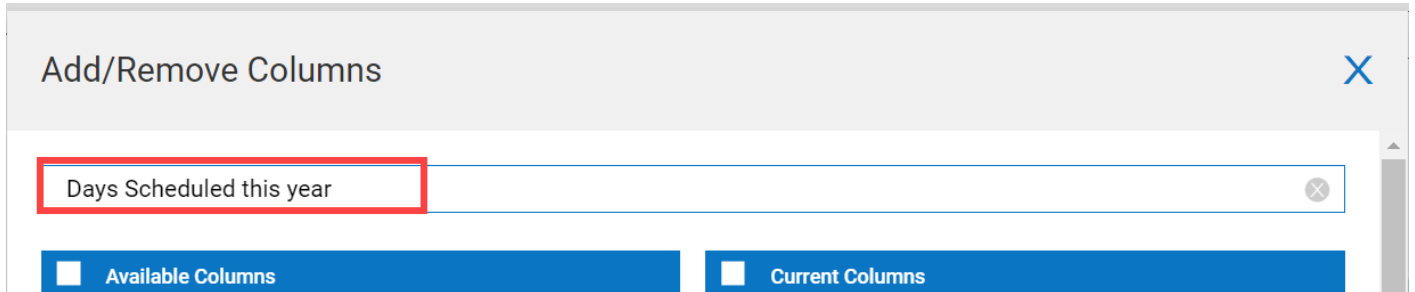
ADD

3. Repeat as necessary then click the “APPLY” button when finished. The column(s) will no longer display on the report.



**Search for Data Items**


1. Type the name of the data item in the 'Search Available and Current Columns' text box.

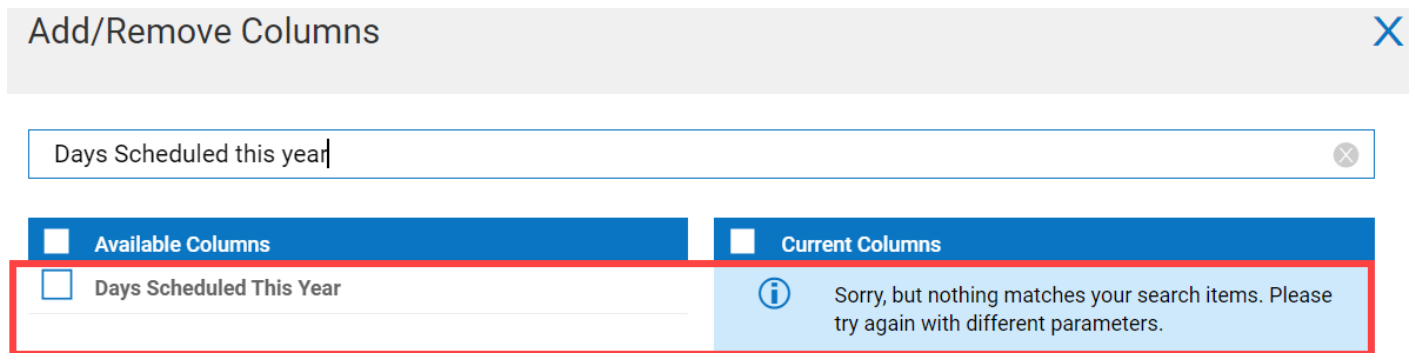


Add/Remove Columns X

Days Scheduled this year X

Available Columns  Current Columns

 As you type, the list of both 'Available Columns' and 'Current Columns' will filter to show those matching what was typed.




Add/Remove Columns X

Days Scheduled this year X

Available Columns  Current Columns

Days Scheduled This Year

 Sorry, but nothing matches your search items. Please try again with different parameters.

2. Select "ADD" or "REMOVE" columns on the report as outlined under the adding or removing columns from a report sections.

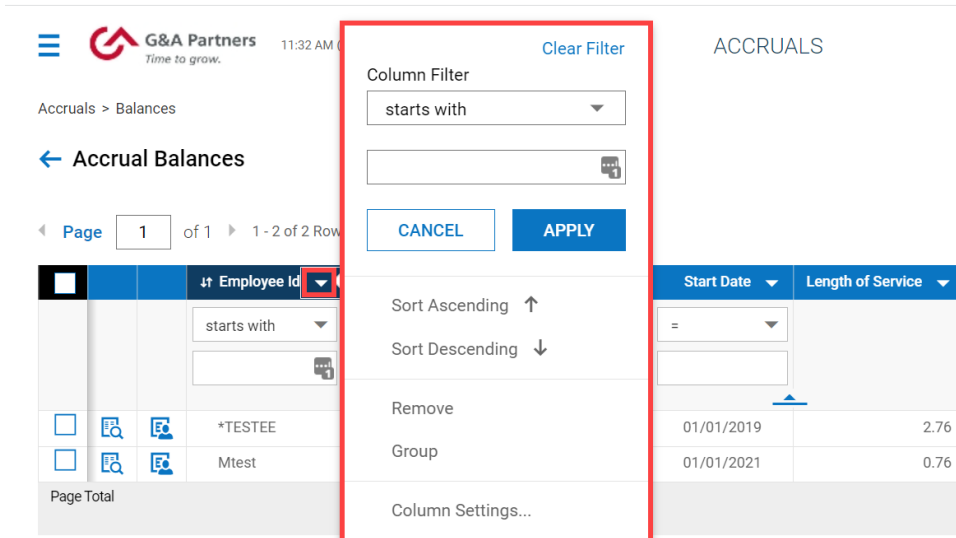
## Data Filters

Data filters change what data is presented in the report. You may apply filters to one or more columns to present data which meets specific criteria.

### Apply a Data Filter

Follow the steps below to apply a Data Filter.

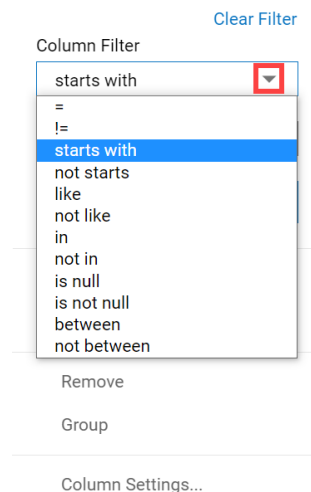
1. Access a report.
2. Click the drop-down arrow to the right of a specific column name. When you do so, the 'Column Filter' dialog will display.



The screenshot shows the 'Accrual Balances' report interface. A red box highlights the 'Column Filter' dialog box that appears when clicking the drop-down arrow on the 'Employee Id' column header. The dialog includes a 'Clear Filter' link, a filter type dropdown (currently set to 'starts with'), an input field, and 'CANCEL' and 'APPLY' buttons. Below the input field are options for 'Sort Ascending', 'Sort Descending', 'Remove', 'Group', and 'Column Settings...'. The background table shows two rows of data:

Employee Id	Start Date	Length of Service
*TESTEE	01/01/2019	2.76
Mtest	01/01/2021	0.76

3. Select the filter type by clicking on the drop-down arrow to display the list, then select.




This close-up shows the 'Column Filter' dialog box with the filter type dropdown menu open. The menu lists various filter operators: 'starts with', '=', '!=', 'starts with', 'not starts with', 'like', 'not like', 'in', 'not in', 'is null', 'is not null', 'between', and 'not between'. The 'starts with' option is currently selected and highlighted in blue. Below the menu are 'Remove' and 'Group' buttons, and a 'Column Settings...' link at the bottom.





Symbol	Definition	Example
=	Entry is exactly this	The entry equals 11/30/21
! =	Entry is not this	The entry does not equal 11/30/21
starts with	Entry starts with	Entry starts with abc
not starts with	Entry does not start with	Entry does not start with abc
like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
in	Entries that include	The entry includes 11/30/21
not in	Entries that do not include	The entry does not include 11/30/21
is null	Entries that are blank	The entry is blank
is not null	Entries that are not blank	The entry has been filled in
between	Entries between two values	This only applies to numerical date values and cannot be used with alphabetical values
not between	Entries of two values	This applies to numerical date values and filters for the dates entered 1/1/21, 5/31/21

 Selecting a filter type will determine the different match types that may be used. “Starts With” is the default.

4. Enter the match criteria and click the Apply button

[Clear Filter](#)

Column Filter




The results will display in the report.

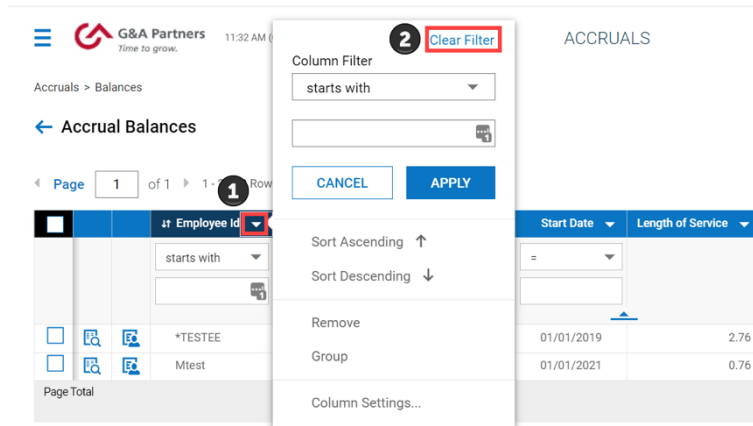
Accruals > Balances

← Accrual Balances

Page 1 of 1 | 1 - 1 of 1 Rows | Saved: Accrual Balances Chart

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours
*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.76	01/01/2022	PTO	40
Page Total							40

 To clear an applied filter, open the Column Filter dialog box and click the “Clear Filter” link.



Column Filter

starts with

CANCEL APPLY

Sort Ascending ↑

Sort Descending ↓

Remove

Group

Column Settings...



## Sort Order

Follow the steps below to change the sort order of data in the report.

1. Open the Column Filter dialog box.
2. Click “Sort Ascending” or “Sort Descending”.

[Clear Filter](#)

Column Filter

starts with ▾

CANCEL
APPLY

Sort Ascending ↑

Sort Descending ↓

Remove

Group

Column Settings...

The report will refresh, and the sort order selected will display.

← Accrual Balances 🔍 ⋮

Page 1 of 1 1 - 2 of 2 Rows Saved: Accrual Balances Chart Columns (1) (1) 📄 ⋮

	Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours
	starts with ▾	starts with ▾	starts with ▾	= ▾		= ▾	= ▾	= ▾
<input type="checkbox"/>	Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO	
<input type="checkbox"/>	*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.76	01/01/2022	PTO	400.00

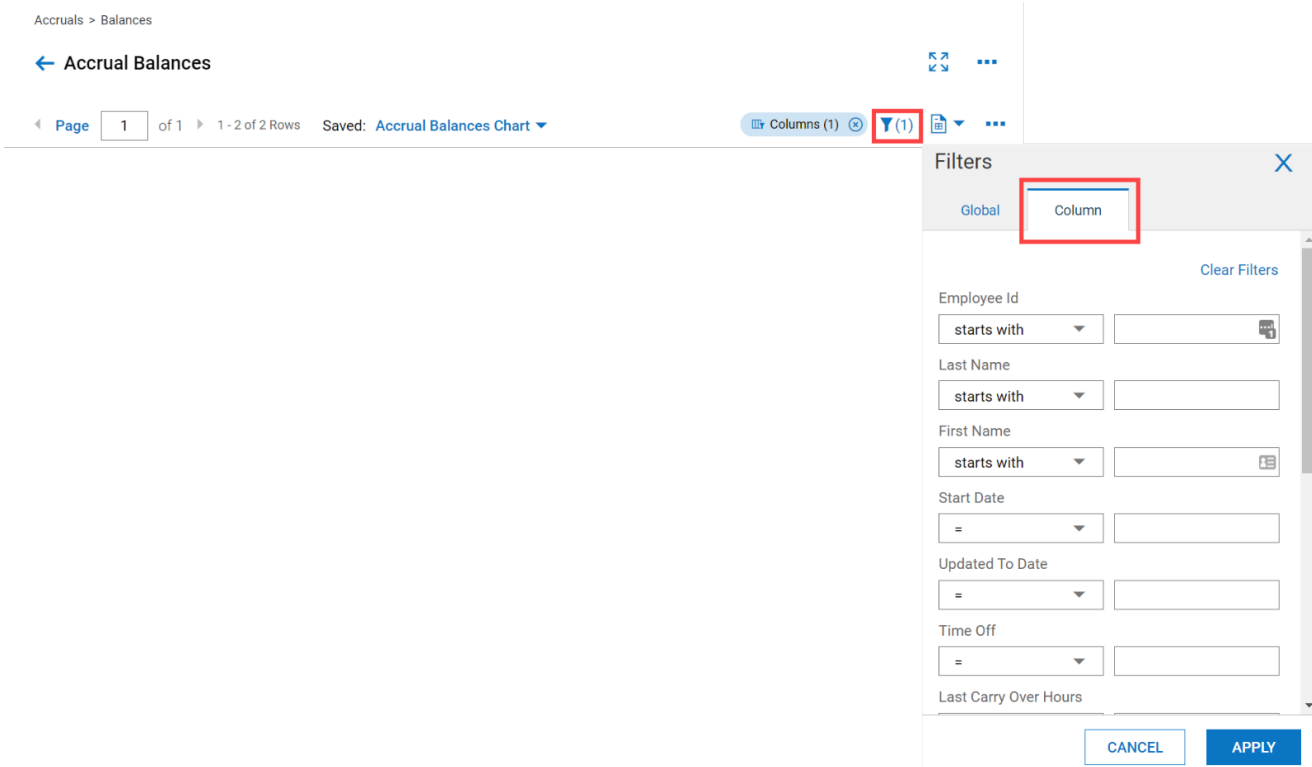
Page Total 400.00



## View All Filters

Follow the steps below to view all filters applied to a report.

1. Click the “Filter” icon at the top right of the table, then click “Column.”



Accruals > Balances

← Accrual Balances

Page 1 of 1 1 - 2 of 2 Rows Saved: Accrual Balances Chart

Columns (1) (1)

**Filters**

Global **Column**

Clear Filters

Employee Id  
starts with

Last Name  
starts with

First Name  
starts with

Start Date  
=

Updated To Date  
=

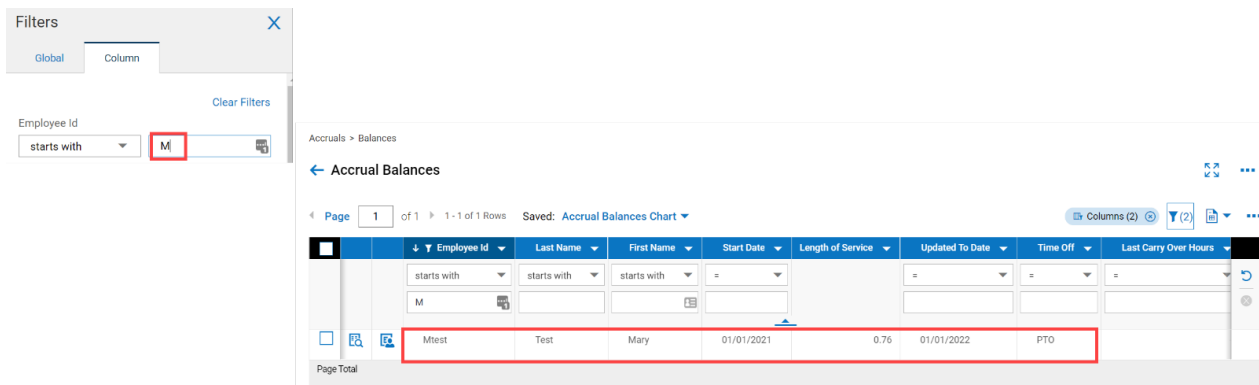
Time Off  
=

Last Carry Over Hours

CANCEL APPLY

 This will display a list of all of the data items on the report and any applied filters.

2. Change any of the filter criteria as needed, then click the “APPLY” button. The changes will display in the report.



Filters

Global **Column**

Clear Filters

Employee Id  
starts with **M**

Accruals > Balances

← Accrual Balances

Page 1 of 1 1 - 1 of 1 Rows Saved: Accrual Balances Chart

Columns (2) (2)

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours
Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO	

Page Total

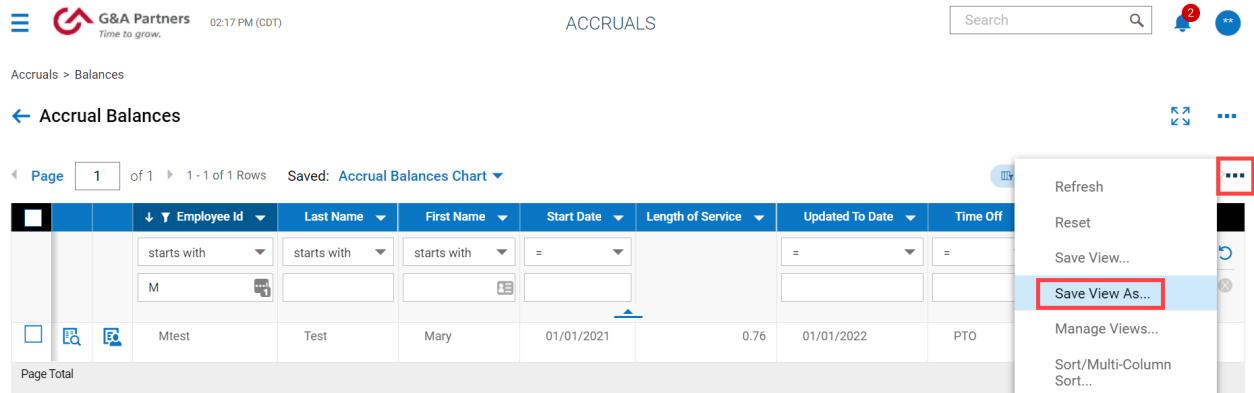


## Save a Report

Once you have a report configured and filtered to your needs, you can save the report to easily access again.

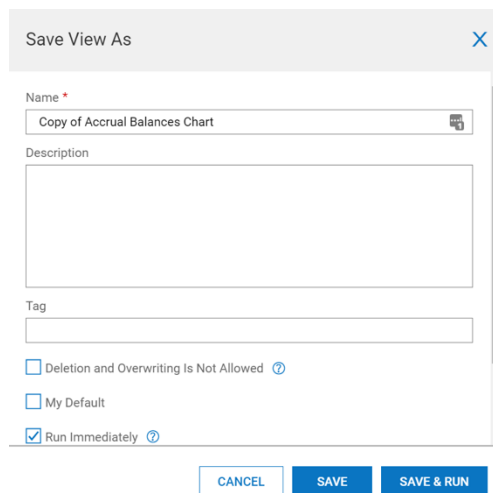
To do this:

1. Access and change the report, as desired.
2. Click the Actions [...] icon and select "Save View As."



The screenshot shows the G&A Partners ACCRUALS report interface. The top navigation bar includes the G&A Partners logo, the time 02:17 PM (CDT), and the word ACCRUALS. A search bar and notification icons are on the right. Below the navigation, the breadcrumb path is 'Accruals > Balances'. The main heading is '← Accrual Balances'. The report is on 'Page 1 of 1' with '1 - 1 of 1 Rows'. The saved view name is 'Accrual Balances Chart'. The table has columns: Employee Id, Last Name, First Name, Start Date, Length of Service, Updated To Date, and Time Off. A row is visible for 'Mtest' (Last Name: Test, First Name: Mary, Start Date: 01/01/2021, Length of Service: 0.76, Updated To Date: 01/01/2022, Time Off: PTO). The 'Actions' menu is open, showing options: Refresh, Reset, Save View..., **Save View As...** (highlighted), Manage Views..., Sort/Multi-Column, and Sort...




The Save View As dialog box will display.




The 'Save View As' dialog box is shown. It has a title bar with a close button (X). The 'Name' field contains 'Copy of Accrual Balances Chart'. The 'Description' field is empty. The 'Tag' field is empty. There are three checkboxes: 'Deletion and Overwriting Is Not Allowed' (unchecked), 'My Default' (unchecked), and 'Run Immediately' (checked). At the bottom, there are three buttons: 'CANCEL', 'SAVE', and 'SAVE & RUN'.



3. Populate the following information for the and click “SAVE”.

Field	Function
<p>Name *</p> <input type="text" value="Copy of Accrual Balances Chart"/>	<p>Allows you to enter a name for the report. If no report name is entered, then the default name will be saved.</p>
<p>Description</p> <input type="text"/>	<p>Allows you to enter a description for identification purposes.</p> <p> This field is optional.</p>
<p>Tag</p> <input type="text"/>	<p>Allows you to enter a label that will be attached for the purpose of identification.</p> <p> This field is optional.</p>
<p><input type="checkbox"/> Deletion and Overwriting Is Not Allowed</p>	<p>When sharing the report with others, this option restricts any modification to the filtering and settings of the report view.</p>
<p><input type="checkbox"/> My Default</p>	<p>Check this box to make this view the default view when you run the report outside of ‘My Saved Reports.’</p>
<p><input checked="" type="checkbox"/> Run Immediately</p>	<p>Uncheck the “Run Immediately” option to set filters and other settings before running the report view.</p> <p> This is helpful when the view contains a large number of records.</p>
<p><input checked="" type="checkbox"/> Share</p> <p><input checked="" type="radio"/> Share With Others</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>All Employees</p> <p>Browse...</p> <p>All Employees</p> </div>	<p>This option only allows the report to be viewed by those who have the same security profile. If a report is created and shared with All Employees, that does not necessarily mean that they will have access to view it.</p>
<p style="text-align: center;"><b>SAVE &amp; RUN</b></p>	<p>This button will save your changes and run the report.</p>

 The report will then be found in ‘My Saved Reports.’



## Export a Report

Once your report has been configured and filtered to your needs, you can export the report to a flat file—a data file that is not related to, nor does not contain, any links to another file.

Follow the steps below to export a report.

1. Access the report you want to export and select “Export” from the Actions [...] icon.

← Accrual Balances ↗ ...

Page 1 of 1 1 - 1 of 1 Rows Saved: Copy of Accrual Balances Chart

	Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off
	starts with M	starts with	starts with	=		=	=
	Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO
Page Total							

- Refresh
- Reset
- Save View...
- Save View As...
- Manage Views...
- Sort/Multi-Column Sort...
- Add/Remove Columns...
- Export...

The “Export” dialog box will display.

Export
✕

[Export Settings](#)

Export File As  

CSV

Display Header/Footer
  Use Unicode

CANCEL
EXPORT

2. Select the file type for export from the “Export File As” drop down.

Export File As  

CSV  
CSV  
 Excel 97-2007  
 Excel 2007  
 PDF  
 HTML  
 HTML (Paged)  
 XML  
 Text  
 Text (Tab Delimited)



3. Check or uncheck the “Display Header/Footer” checkbox to select whether you wish for headers and footers to be a part of the report.

Display Header/Footer

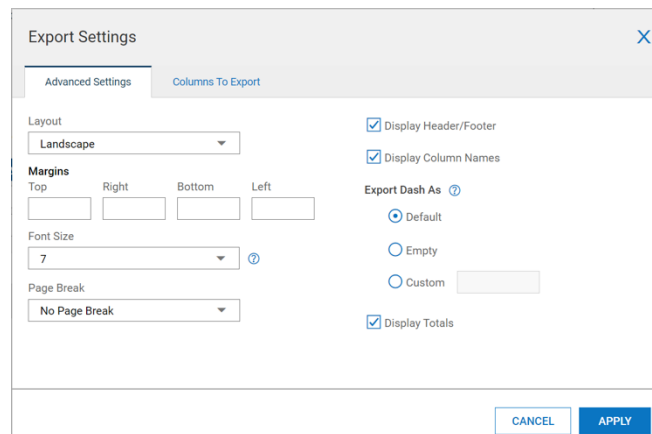
4. Check “Use Unicode” to select whether you want to see it as part of the report.

Use Unicode



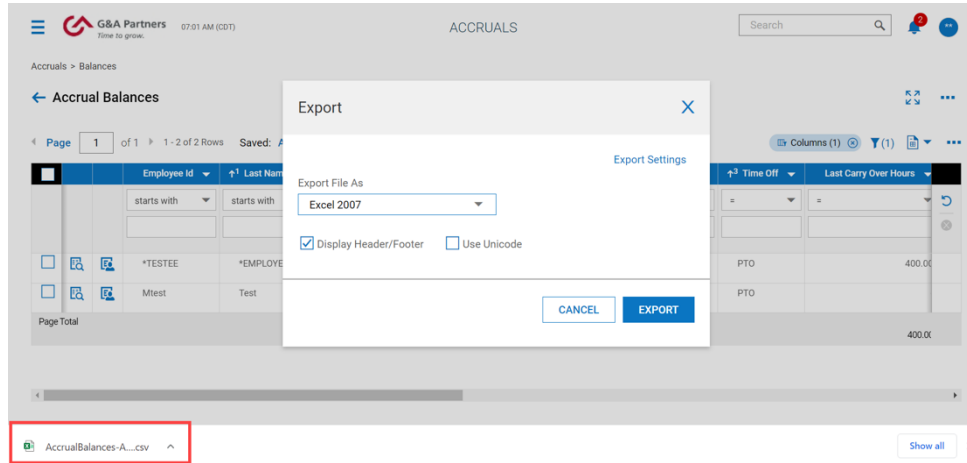
Unicode is an international encoding standard for use with different languages and scripts, by which each letter, digit, or symbol is assigned a numeric value that applies across different platforms and programs.

5. Click the “Export Settings” link for advanced export options, then click the Apply button.

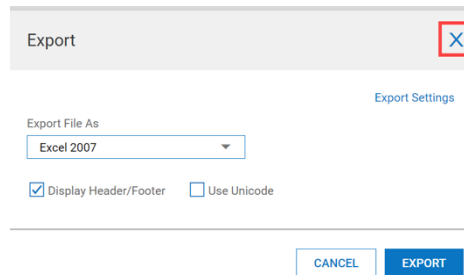




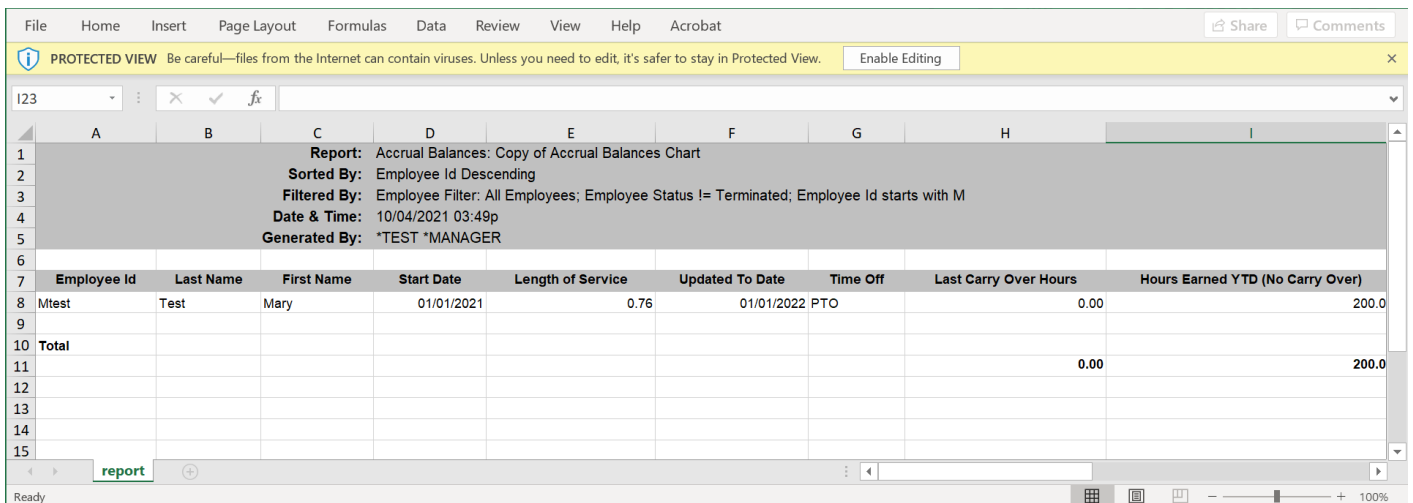
- Click the “EXPORT” button. The report will be created and exported with the format and settings selected.



 To close the Export dialog box, click the “X” in the upper right-hand corner.



- Locate and open the downloaded report on your desktop to view.




Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off	Last Carry Over Hours	Hours Earned YTD (No Carry Over)
Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO	0.00	200.0
<b>Total</b>							0.00	200.0



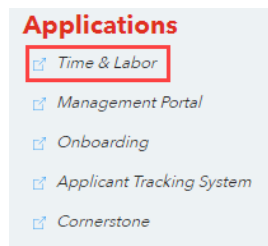
## Print a Report

Once you have a report configured and filtered to your needs, you can print the report by following the below steps:

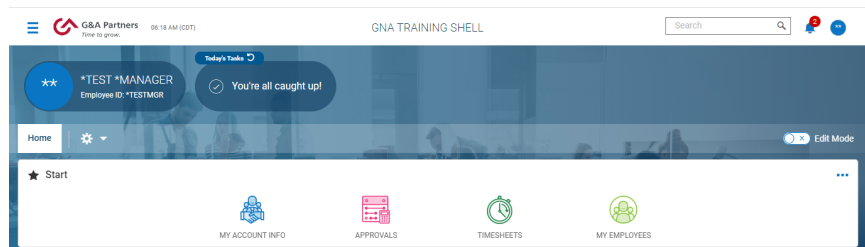
**1. Log into WorkSight.**

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

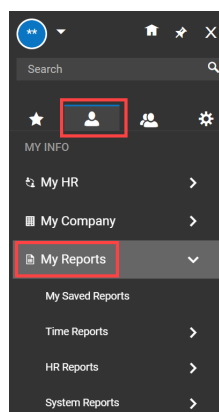
**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



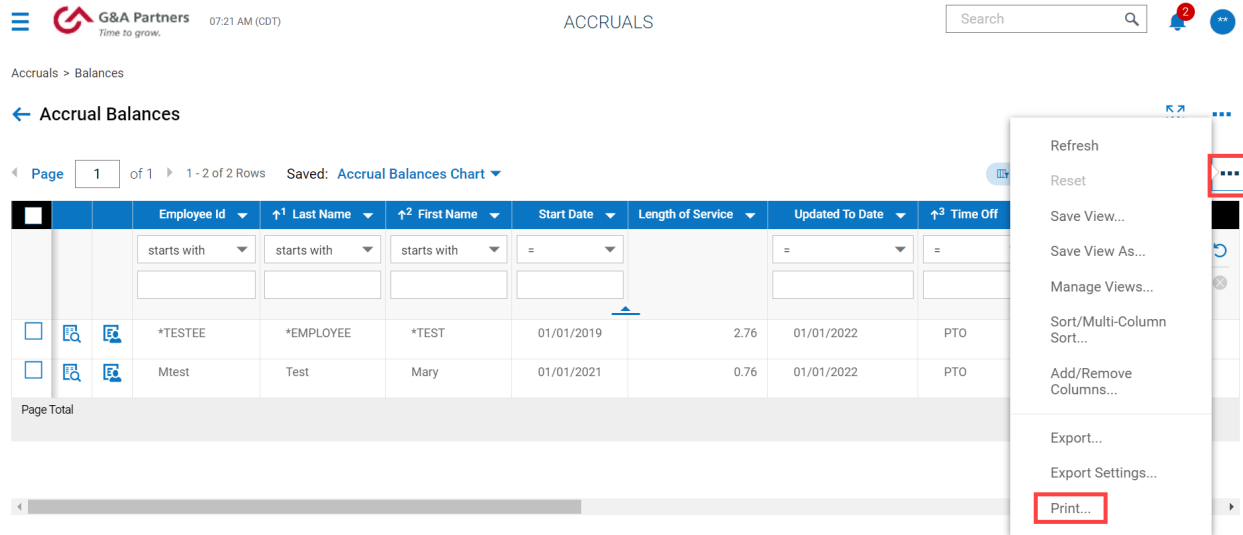
The TLM dashboard will display.



**3. Navigate to the report via the Side menu and open it.**



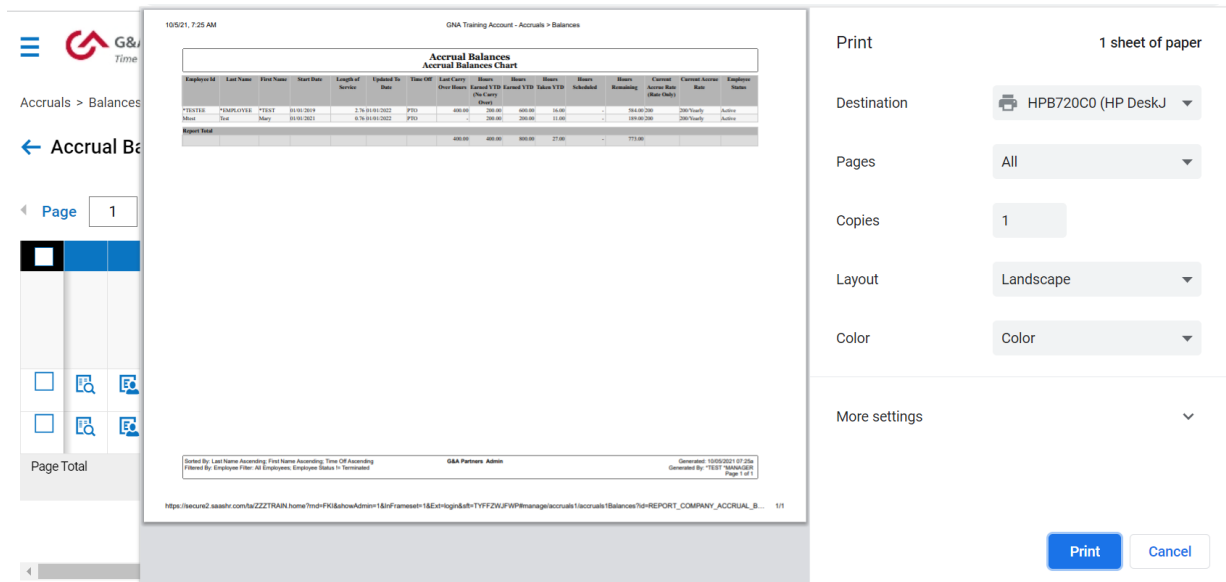
#### 4. Click on the Actions icon and select “Print.”



The screenshot shows the 'Accruals' page with a table of employee accrual balances. A dropdown menu is open over the table, highlighting the 'Print...' option. The table contains the following data:

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off
*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.76	01/01/2022	PTO
Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO

The Print dialog box will open.



The screenshot shows the 'Print' dialog box for the 'Accrual Balances' report. The dialog includes the following settings:

- Destination: HPB720C0 (HP DeskJ)
- Pages: All
- Copies: 1
- Layout: Landscape
- Color: Color

At the bottom of the dialog, there are 'Print' and 'Cancel' buttons. The background shows a preview of the report with a table of employee accrual balances.

#### 5. Select your options, then click the Print button.




## Refresh Report Data

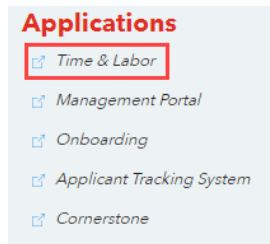
At any given time, the underlying data upon which a report is designed can change. For example, if you are working with a report displaying time worked, the underlying data will change any time an employee clocks-in or clocks-out.

Follow the steps below to refresh report data.

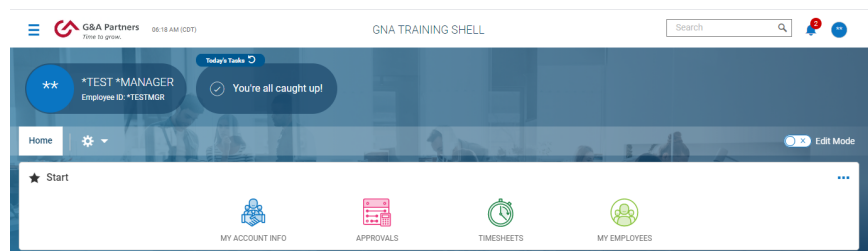
**1. Log into WorkSight.**

 If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

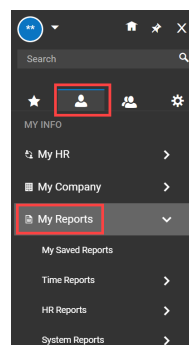
**2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.**



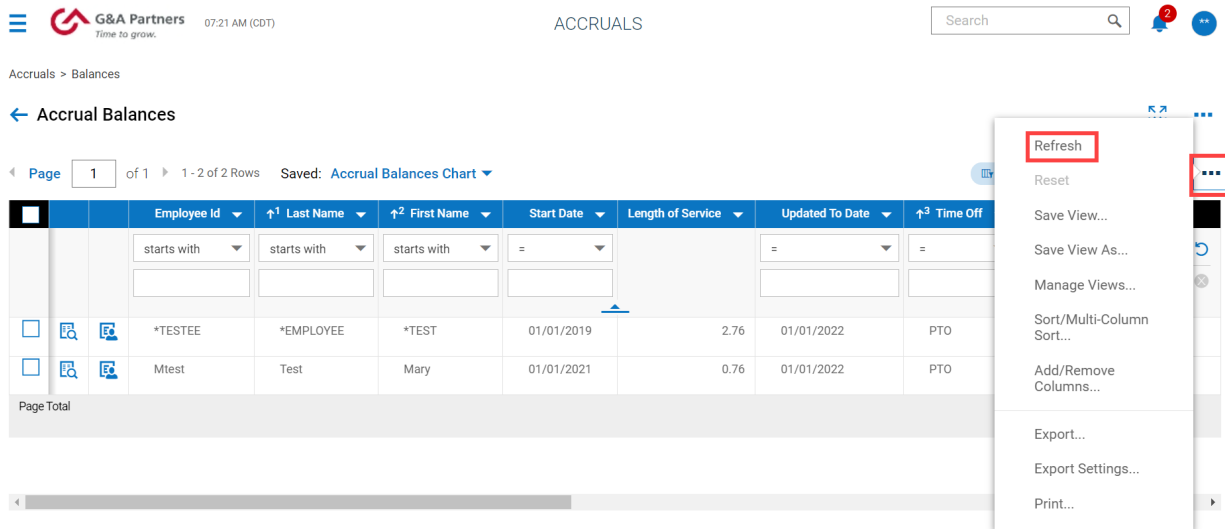
The TLM dashboard will display.



**3. Navigate to the report via the Side menu and open it.**



4. Click on the Actions icon and select “Refresh.”



The screenshot shows the G&A Partners interface for the ACCRUALS section. The breadcrumb trail is "Accruals > Balances". The page title is "Accrual Balances". Below the title, there is a navigation bar with "Page 1 of 1" and "1 - 2 of 2 Rows". A search bar is located in the top right corner. The main content is a table with the following columns: Employee Id, Last Name, First Name, Start Date, Length of Service, Updated To Date, and Time Off. The table contains two rows of data. An actions menu is open on the right side of the table, with the "Refresh" option highlighted in red. The menu also includes options like "Reset", "Save View...", "Export...", and "Print...".

Employee Id	Last Name	First Name	Start Date	Length of Service	Updated To Date	Time Off
*TESTEE	*EMPLOYEE	*TEST	01/01/2019	2.76	01/01/2022	PTO
Mtest	Test	Mary	01/01/2021	0.76	01/01/2022	PTO



## My Saved Reports

My Saved Reports provides quick access to reports you have configured as well as reports others may have created and shared with you.

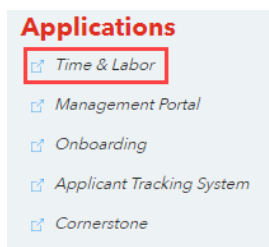
Follow the steps below to access My Saved Reports.

1. Log into WorkSight.

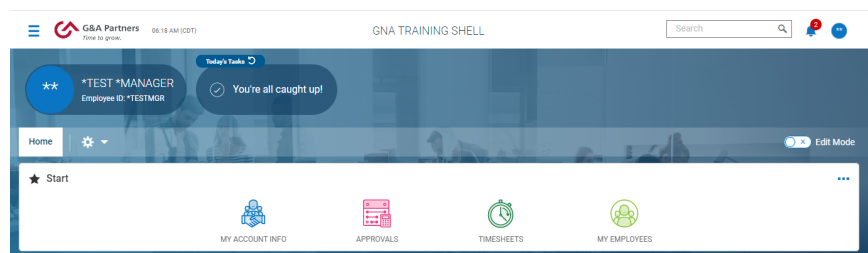


If you are logged into WorkSight but not Time and Labor Management (TLM), skip to step 2. If you are already logged into TLM, skip to step 3.

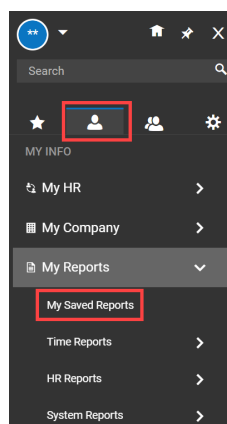
2. Click Time and Labor under the Applications header in the Navigation Pane on the WorkSight dashboard.





The TLM dashboard will display.




3. Navigate to My Info > My Reports > My Saved Reports via the Side menu and open it.






A list of reports will display.






07:38 AM (CDT) MY REPORTS   

My Reports > My Saved Reports


← My Saved Reports 






 Chart functionality is not currently available for this report. 

Page 1 of 1 | 1 - 2 of 2 Rows | Saved: Copy of ZZ\_Default | Others' Settings  (0) 

	↑ Saved As Name	Report Category	Report Name	Report Owner	Created	
	=	=	=	=	=	
	Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/01/2021 11:23a	
	Copy of Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/04/2021 03:15p	


4. Click the Run report icon for the report you want to open.



Page 1 of 1 | 1 - 2 of 2 Rows | Saved: Copy of ZZ\_Default | Others' Settings  (0) 


	↑ Saved As Name	Report Category	Report Name	Report Owner	Created	
	=	=	=	=	=	
	Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/01/2021 11:23a	
	Copy of Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/04/2021 03:15p	






 To view others' reports, as well as company reports, turn on the toggle for "Others' Settings" in the top-right corner.

My Reports > My Saved Reports

← My Saved Reports 


 Chart functionality is not currently available for this report. 

Page 1 of 1 | 1 - 2 of 2 Rows | Saved: Copy of ZZ\_Default | Others' Settings  (0) 



	↑ Saved As Name	Report Category	Report Name	Report Owner	Created	
	=	=	=	=	=	
	Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/01/2021 11:23a	
	Copy of Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/04/2021 03:15p	



A list of reports will display.


07:48 AM (CDT)











MY REPORTS

My Reports > My Saved Reports

← My Saved Reports ↗

Page  of 1 | 1 - 23 of 23 Rows | Saved: Copy of ZZ\_Default Others' Settings  (1) ⋮

	↑ Saved As Name	Report Category	Report Name	Report Owner	Created	
	=	=	=	=	=	
	**FIX ME**G&A Payroll Balancing Report	Calculated Time	Calculated Time Summary	Company	05/17/2018 07:31p	
	*Employees Approaching Overtime	Calculated Time	Calculated Time Summary By Week	Company	08/24/2020 02:41p	
	*Extra Pay Import File	HR Maintenance	Employee Roster	Company	08/06/2020 01:22p	
	 Accrual Balances Chart	Accrual Balances	Balances	*TEST *MANAGER	10/01/2021 11:23a	
	Accrual Balances Chart	Accrual Balances	Balances	Company	02/15/2018 09:26a	
	Accrual Balances for Prism Import - [Pay Period Name]	Accrual Balances	Balances	Company	08/31/2020 03:13p	
	All Punches with Location	System Utilities	All Punches	Company	01/22/2019 10:31a	

5. Click the Run report icon for the report you want to open.





# Frequently Asked Questions (FAQs)

## How do I control or change the type of timesheet an employee uses?

The type of timesheet an employee uses is determined by the timesheet profile. Profiles are typically controlled by payroll administrators. If you do not have access to the 'Profiles' menu, contact your payroll administrator to have the employee's timesheet profile assignment logic changed.

## A new employee has joined my department, but I cannot see their timesheet information in the Time & Labor Module. Why?

While your security level controls your access to the system functions, groups control the users you can access. It is possible this new employee was added to the Time & Labor Module but was not added to your group. If you do not have access to the 'Groups' menu, contact your payroll administrator to have the new employee added to your group.

## I accidentally approved a timesheet that should not have been approved. Can this be undone?

Yes. Depending on your security level, you may be able to go back to that specific timesheet and reject it. If you do not have access to do this, reach out to your payroll administrator and request that the timesheet you accidentally approved be rejected.

## Can I find out which IP address employees are using to log into the Time & Labor Module?

Yes. Navigate to the 'Global Access' report (*My Info > My Reports > System > System Utilities > Global Access*) to view this information. From here, select the date range you want to include in the report, include all available columns in the report output and then click "Run Report." The report output will display all logins for the date range you selected. The IP column displays the IP address that was used for the login.

## Can I find out when a user's timesheet was edited?

Yes. Navigate to the 'Timesheet Audit Trail' report (*My Info > My Reports > Time Reports > Audit Trail > Timesheets*) to view this information. Select the date range you want to include in the report, include all available columns in the report output and then click "Run Report." The report output will display all timesheets that have been edited. Click the Edit icon to view how each timesheet was edited in detail.



## Will my employees be submitting their timesheets?

Yes. Employees will be able to submit their own timesheets from the 'Current Timesheet' page (*My Info > Timesheet > Timesheet*), if your employer has not already configured them to submit automatically. Once an employee is in their current timesheet, they will be able to click "Submit Timesheet for Approval" in the navigation bar. After the employee submits their timesheet, they will not be able to add or record any further time punches unless the timesheet is rejected.

## How will my employees be submitting time-off requests?

Employees can submit time-off requests by navigating to the 'Time Off Request' page (*My Info > My Time > Time Off > Request*). From here they will be able to fill out the time-off request information and then submit their request by clicking "Submit Request."

## I'm a manager but I'm not able to edit my own timesheet. Why not?

Some organizations do not allow managers to edit their own timesheets; only payroll administrators have the ability to do so. If you believe you should have access to edit your own timesheet, speak with your payroll administrator and they can give you this access.

