

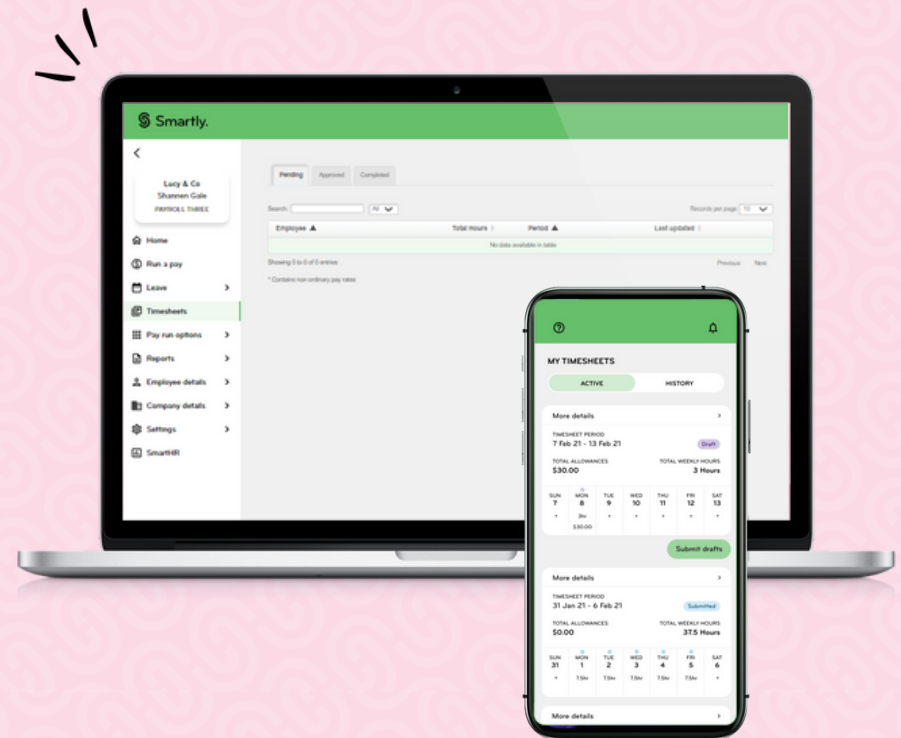


# Timesheet smartly.

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



WHY ARE THEY CALLED  
TIMESHEETS IF THERE'S NO  
SHEETS AND IT TAKES NO  
TIME?





# Flexible time and costs

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

## **This guide covers:**

### Getting started

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3. New to Smartly?
4. Enabling employees for self-service
5. Setting permissions
6. Assigning approvers

### Adding hours to pays

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8. Timesheets via Smartly app
9. Approving and declining timesheets
10. Adding and editing a time entry
11. Viewing hours in a pay packet

# Getting started

## New to Smartly?

If your employees use the app, they will need to be enabled for self-service in your Smartly site.

From our self-service screen, payroll administrators can easily enable self-service and manage permissions for the whole team all from one place!

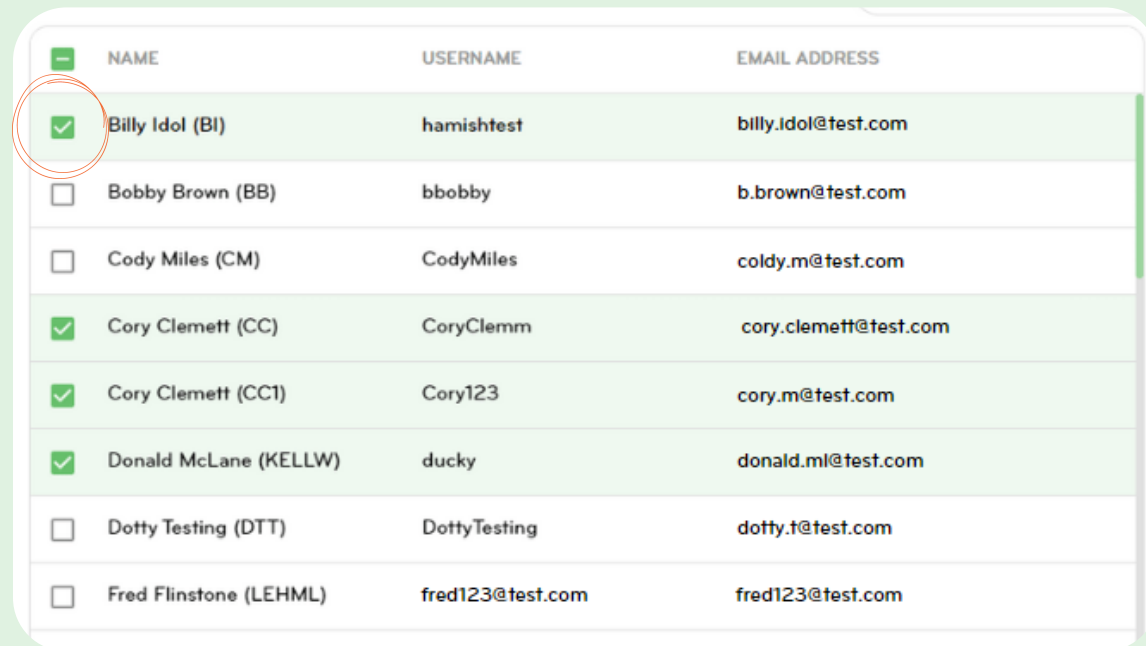
If you prefer to watch and learn, we've captured all the information in a [helpful video guide](#).

Self-service screen: when you log in to Smartly, you can find your self-service screen in the 'Company details' menu.

Here you'll find your employees, their home departments, email address, usernames, and if they are enabled for self-service.

## Turning on self-service for employees

- 1 Click on 'Set passwords' and tick each employee who will be using the Smartly app for the first time.



<input type="checkbox"/>	NAME	USERNAME	EMAIL ADDRESS
<input checked="" type="checkbox"/>	Billy Idol (BI)	hamishtest	billy.idol@test.com
<input type="checkbox"/>	Bobby Brown (BB)	bbobby	b.brown@test.com
<input type="checkbox"/>	Cody Miles (CM)	CodyMiles	coldy.m@test.com
<input checked="" type="checkbox"/>	Cory Clemett (CC)	CoryClemm	cory.clemett@test.com
<input checked="" type="checkbox"/>	Cory Clemett (CC1)	Cory123	cory.m@test.com
<input checked="" type="checkbox"/>	Donald McLane (KELLW)	ducky	donald.ml@test.com
<input type="checkbox"/>	Dotty Testing (DTT)	DottyTesting	dotty.t@test.com
<input type="checkbox"/>	Fred Flinstone (LEHML)	fred123@test.com	fred123@test.com



- 2 Once selected, click 'Send'. This will automatically send out a password reset email to your employees.



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

# Getting started

## Enabling employees for self-service

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

## How to enable timesheets in the Smartly app

1 Tick the check box to enable self-service.

**Manage self-service for employees**  
Set up and manage self-service for your employees, choose which permissions/features they have access to and set who their leave and timesheet approvers are.

MANAGE SELF-SERVICE		SET PERMISSIONS	ASSIGN APPROVERS		
NAME	HOME DEPARTMENT	EMAIL ADDRESS	USERNAME		ENABLE SELF-SERVICE
Billy Idol (BI)	Wages	billy.idol@test.com	billyidol	<input checked="" type="checkbox"/>	
Peter Piper (HOORK)	SmartPayroll Helpdesk	peter.piper@test.com	p_piper	<input checked="" type="checkbox"/>	
Nikki Test (NT)	SmartPayroll Helpdesk	nikki.test@test.com	nikkitest123	<input checked="" type="checkbox"/>	
Jonah Lomu (KELLP)	SmartPayroll Helpdesk	jonah.l@test.com	jonah123	<input checked="" type="checkbox"/>	
Donald McLane (KELLW)	SmartPayroll Helpdesk	Donald.CcLane@test.com	ducky	<input checked="" type="checkbox"/>	
Mickey Mouse (SHELK)	SmartPayroll Helpdesk	m.mouse@test.com		<input type="checkbox"/>	
Fred Flinstone (LEHML)	SmartPayroll Helpdesk	Freddy@test.com	fred123@gmail.com	<input checked="" type="checkbox"/>	
Mickey Mouse (HETAT)	SmartPayroll Helpdesk	Mickey.M@test.com	m_mouse	<input checked="" type="checkbox"/>	
Test Journey (TE)	SmartPayroll Helpdesk			<input type="checkbox"/>	

2 System will automatically add their email address as their username to log in to the app.

Note: To see which employees haven't been enabled for self-service, click on the 'Enable self-service' column sort arrows.

# Getting started

## Setting permissions for your employees

Once enabled you can set permissions for your employees by selecting the 'Set Permissions' tab. All employees enabled for self-service will have the 'apply for leave' permission ticked on automatically.

## Updating in bulk

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

## How to enable timesheets in the Smartly app

### Manage self-service for employees

Set up and manage self-service for your employees, choose which permissions/features they have access to and set who their leave and timesheet approvers are. Select multiple employees using the checkboxes on the left to update permissions and assign approvers in bulk.

MANAGE SELF-SERVICE	SET PERMISSIONS	ASSIGN APPROVERS			
<input type="checkbox"/> NAME	HOME DEPARTMENT	APPLY FOR LEAVE	ENTER TIMESHEETS	APPROVE LEAVE	APPROVE TIMESHEETS
<input type="checkbox"/> Billy Idol (BI)	Wages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Bobby Brown (BB)	Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Cody Miles (CM)	Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Cory Clemett (CC)	SmartPayroll Helpdesk	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Cory Clemett (CC1)	SmartPayroll Helpdesk	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Donald McLane (KELLW)	SmartPayroll Helpdesk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Edit 4 employees

MANAGE SELF-SERVICE

NAME

Billy Idol (BI)

Bobby Brown (BB)

Cody Miles (CM)

Cory Clemett (CC)

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

# Getting started

## Assigning approvers

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

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

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

## How to assign approvers for employees

MANAGE SELF-SERVICE	SET PERMISSIONS	ASSIGN APPROVERS	
<input type="checkbox"/> ↕ NAME	<input type="checkbox"/> ↕ HOME DEPARTMENT	<input type="checkbox"/> ↕ LEAVE APPROVER	<input type="checkbox"/> ↕ TIMESHEET APPROVER
<input type="checkbox"/> Peter Piper (HOORK)	SmartPayroll Helpdesk	Mickey Mouse ▼	Bobby Brown ▼
<input type="checkbox"/> Mickey Mouse (HETAT)	SmartPayroll Helpdesk	Mickey Mouse ▼	Hitesh Thakkar ▼
<input type="checkbox"/> Cody Miles (CM)	Marketing	Mickey Mouse ▼	Permissions not set up.
<input type="checkbox"/> Billy Idol (BI)	Wages	Mickey Mouse ▼	Jack Nicholson ▼
<input type="checkbox"/> Maria Pavlova (MP)	Marketing	Mickey Mouse ▼	Permissions not set up.
<input type="checkbox"/> Bobby Brown (BB)	Marketing	Mickey Mouse ▼	Donald McLane ▼
<input type="checkbox"/> Jona Lomu (JL)	Marketing	Mickey Mouse ▼	Permissions not set up.
<input type="checkbox"/> ROB TAYLOR (RT)	Marketing	Mickey Mouse ▼	Permissions not set up.
<input type="checkbox"/> JONA LAMU (JL1)	SmartPayroll Helpdesk	Mickey Mouse ▼	Hitesh Thakkar ▼

# Getting started

## Updating in bulk

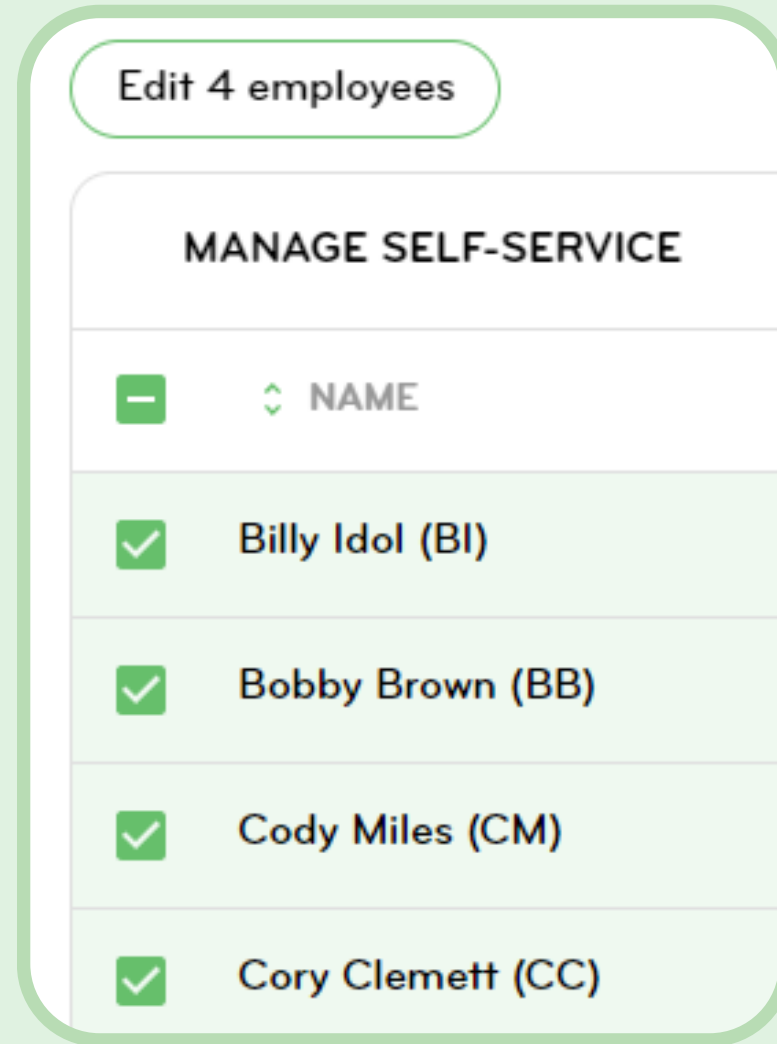
Or select a group of employees, then click on the edit button to edit multiple employees at once. Once completed, click Confirm.

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

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

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

## How to assign approvers in bulk



The screenshot shows a user interface for managing self-service. At the top, there is a button labeled "Edit 4 employees". Below this is a section titled "MANAGE SELF-SERVICE". Underneath, there is a table with a header row containing a minus sign icon and a dropdown arrow next to the text "NAME". The table lists four employees, each with a checked checkbox and their name followed by initials in parentheses:

<input type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	Billy Idol (BI)
<input checked="" type="checkbox"/>	Bobby Brown (BB)
<input checked="" type="checkbox"/>	Cody Miles (CM)
<input checked="" type="checkbox"/>	Cory Clemett (CC)



# Adding hours to pays

## Hours submitted through the Smartly app

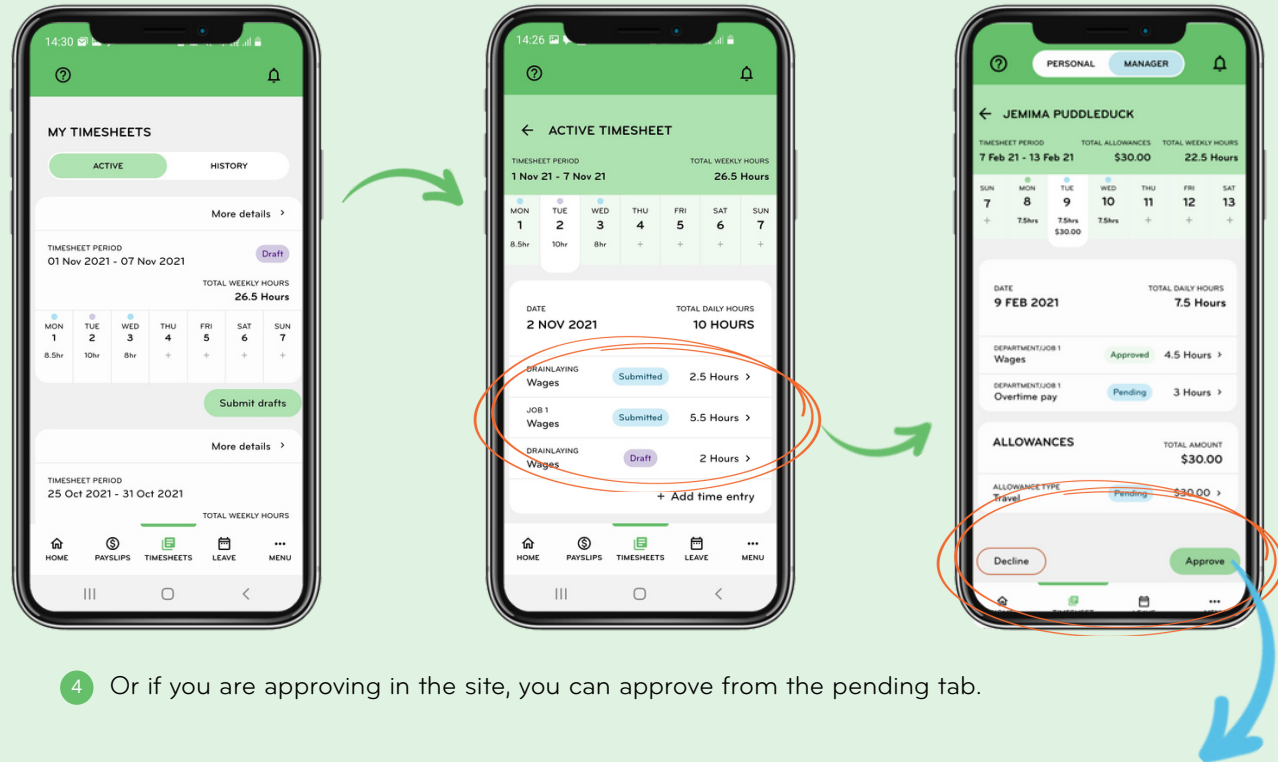
Hours submitted by employees through the Smartly mobile app automatically feed through to your payroll site.

They will show up in the pending tab until they've been approved by either you or their manager.

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

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

- 1 Timesheets sync up with an employee's pay period and each timesheet card shows a seven day working week.
- 2 At a glance employees can see how many hours they've worked and see where in the approval process their timesheets are.
- 3 If you selected a timesheet approver, their hours will be sent to their manager to review before approving for payroll.



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

**Timesheet Batch for Ali Bali (AB)**  
For period 16th Apr 2023 - 22nd Apr 2023

Date	Start	End	Break(hrs)	Hours	Pay Type
Monday, 17th Apr 2023	09:00	17:00	0.50	7.50	Salary
Tuesday, 18th Apr 2023	09:00	17:00	0.50	7.50	Salary
Wednesday, 19th Apr 2023	09:00	17:00	0.50	7.50	Salary
				<b>Total: 22.50</b>	

**Approve** **Decline**



# Adding hours to pays

## Approving and declining timesheets

To view, approve, add or edit employee timesheets, head to the 'Timesheets' section.

In this screen, you have three views:

- Pending - Hours yet to be approved and added to a pay.
- Approved - Hours shown in a calendar view, that have already been added to a pay.
- Completed - Hours that have already been paid.

Follow steps 1-3 to approve or decline a timesheet.

## How to approve and decline timesheets

1 Click into the pending tab.

2 Choose your employee and click the pencil icon.

The screenshot shows the Smartly app interface. On the left, a navigation menu has 'Timesheets' circled in red. The main screen shows a 'Pending' tab selected, with a table of timesheet entries for 'Ali Bali (AB)'. The table has columns for Employee, Total Hours, Period, and Last updated. A pencil icon in the 'Last updated' column is circled in red. Below the table, a modal window titled 'Timesheet Batch for Ali Bali (AB)' is displayed, showing a table of dates, start/end times, breaks, hours, and pay types. The 'Approve' and 'Decline' buttons at the bottom of the modal are circled in red.

Date	Start	End	Break(hrs)	Hours	Pay Type
Monday, 17th Apr 2023	09:00	17:00	0.50	7.50	Salary
Tuesday, 18th Apr 2023	09:00	17:00	0.50	7.50	Salary
Wednesday, 19th Apr 2023	09:00	17:00	0.50	7.50	Salary
				Total: 22.50	

3 Approve or decline the timesheet batch.

# Adding hours to pays

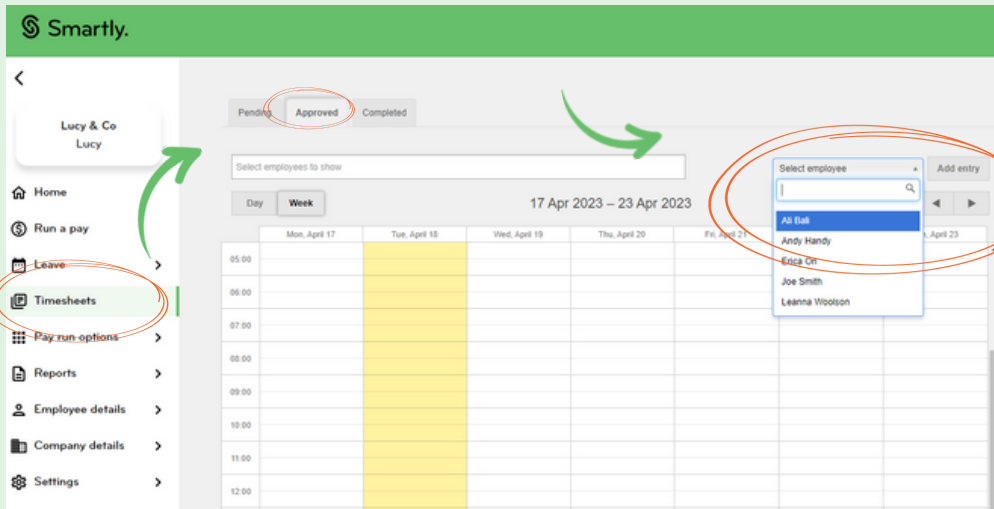
## Adding and editing a time entry for an employee

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

To add an entry, follow steps 1-7.

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

## How to add a time entry



### Steps 1-3

1. Go to the 'Approved' tab.
2. Choose an employee.
3. Click on 'Add entry'.

### Steps 4-6

4. Choose their 'Pay Type' from the drop down menu.
5. Enter the date and start and end times.
6. Enter their unpaid break.

A screenshot of the time entry form. The fields are: Employee: Ali Ball; Pay Type: Salary (dropdown); Date: 18/04/2023; Time: 09:00 - 17:00 (hh:mm); Break: 0.5 hours; Duration: 7.50 hours; Comment: (empty text box). At the bottom right, there are 'Save' and 'Cancel' buttons.

### Step 7

Click 'Save' and this will approve the hours for the pay and show up in the calendar.

# Adding hours to pays

## Viewing hours in a pay packet

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

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

Smartly.

Lucy & Co  
Lucy

Home  
Run a pay  
Leave  
Timesheets  
Pay run options  
Reports  
Employee details  
Company details

### Normal pay details for Andy Handy

15 Apr 2023 - 21 Apr 2023  
New Weekly, Weekly | Wages employee | Paid up to: 11 Dec 2022

#### Earnings More Info

NORMAL PAY	HOURS	RATE	AMOUNT
Wages	7.5	\$ 35.0000	\$262.50
Overtime		\$ 40.0000	
Double Time		\$ 70.0000	

Add leave item | Add one off payment | Edit costing

No. of days paid 2

← Back to Pay Run  
→ Save & Go to next unpaid employee  
→ Save & Go to next employee

Select employee [dropdown] Go  
Save Cancel

The PAYE and Net Pay amounts will be displayed on selecting the Save Button

Gross Pay \$642.50  
Ordinary Pay Tax  
PAYE -

# We're here to help

For information or answers to simpler questions head to our online help centre. Otherwise, if you've got something niggly or urgent that you want to chat through with an expert – we've got you!

Our customer support team can be reached on 0800 10 10 38, Monday to Friday, excluding public holidays.

*HELP LINE, ONLINE, CHAT LINE,  
ONE-LITTLE-QUESTION-LINE.  
SMARTLY HAS MORE WAYS TO  
HELP SORT YOUR PAYROLL.*

