TIME REGISTRATION MODULE

MANUAL

OTYS Recruiting Technology

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1 | INTRODUCTION

1.1 ABOUT THE TIME REGISTRATION MODULE

The Time Registration Module was developed to put an end to handwritten time sheets.
By automating the process of time registration you save time and reduce the chance of errors.
The strength of the system lies in the principle that the candidate and the client can fill in and check the hours worked, after which you can approve the hours with a touch of the button. After this, the data is automatically updated in OTYS.

1.2 PURPOSE OF THIS MANUAL

The purpose of this manual is to familiarise you with the Time Registration Module and show you how you can use the module to process the time registration of your placements in a quick and efficient way.

1.3 STRUCTURE OF MANUAL

This manual starts with an introduction chapter with an explanation of the added value of the Time Registration Module. It then discusses the features of the module.

A distinction is made between:

- Basic functions
- Time registration on your website
- Time registration in OTYS Go!
- Creating and exporting overviews

2 | BASIC FUNCTIONS

2.1 SEARCH AND FILTER

In order to retrieve the correct time registration in your system, you can use the advanced filter and search functionality in OTYS Go!. You can find the search function in the right-hand panel of your screen. Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at a later time. Instructions on how to best use these functions are given in the manual 'Lists, Searches and Matching'. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

2.2 EDIT YOUR LIST VIEW

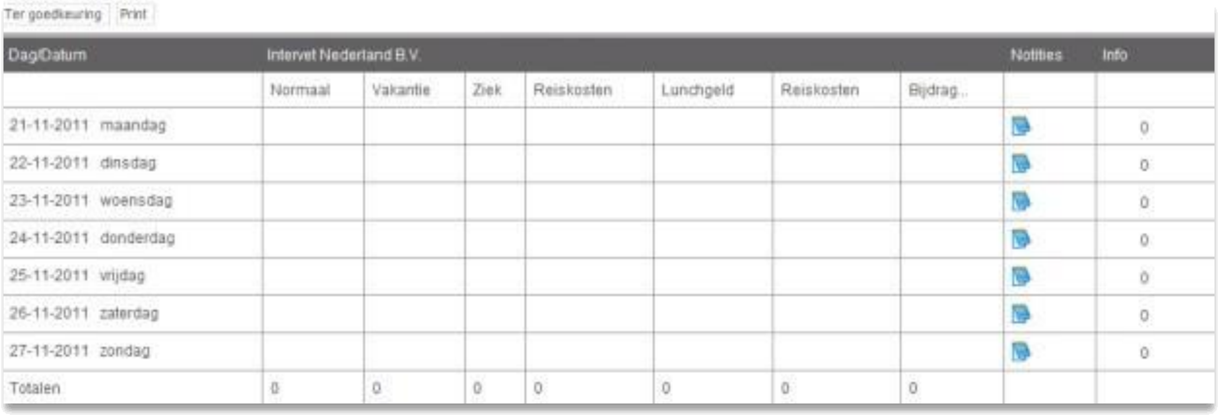
Do you often work with the Time Registration module and do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You simply save your new view so you can use it any time. Instructions on the best way to use this function are given in the manual for 'Lists, Searches and Matching'.

3 | TIME REGISTRATION ON YOUR WEBSITE

3.1 TIME REGISTRATION IN THE CANDIDATE PORTAL

To ensure your candidate can enter their own hours, you can provide them with a username and password. In most cases, the candidate will receive these during registration/application on the website. In the other cases, you can create them at a later time. The creation of a web user is explained in the manual for the Candidate Module.

The candidate can use the login details to log into the candidate section of the website. An extra 'Time registration' tab has been added to the menu. Here the candidate has the option to fill in time sheets. The candidate can enter their hours worked, overtime, work hours with surcharge, and travel allowance per week. The candidate can also add notes per day. After completing the information, the candidate clicks the 'For approval' button. A green check mark appears to indicate that the hours have been sent for approval. The time sheet is now sent to your email address in an email with a clickable link. It is also possible to have the client check and approve time sheets. This is explained in more detail below.
The candidate can also print the time sheet with the 'Print' button. Finally, with the 'Time registration history' button, the candidate can view previous time sheets.



Dag/Datum	Intervet Nederland B.V.							Notities	Info
	Normaal	Vakantie	Ziek	Reiskosten	Lunchgeld	Reiskosten	Bijdrag...		
21-11-2011 maandag								✎	0
22-11-2011 dinsdag								✎	0
23-11-2011 woensdag								✎	0
24-11-2011 donderdag								✎	0
25-11-2011 vrijdag								✎	0
26-11-2011 zaterdag								✎	0
27-11-2011 zondag								✎	0
Totalen	0	0	0	0	0	0	0		

Fig. 1 – Complete a time sheet in the candidate portal

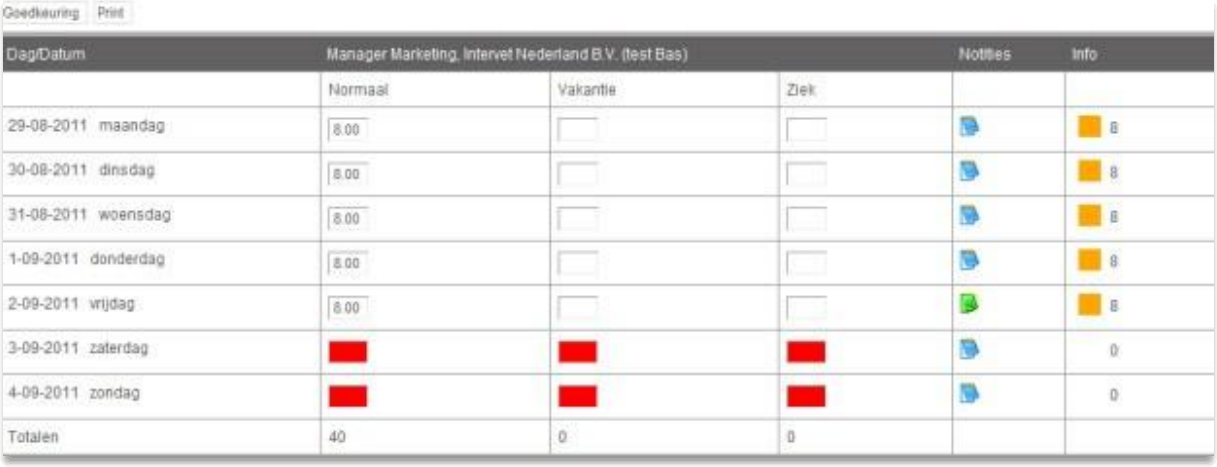
3.2 TIME REGISTRATION IN THE EMPLOYER PORTAL

In order to ensure that the client can easily check and approve the time sheets of flex workers, you can give the client access to the employer portal on your website. To assign these rights to the client, you need to go through a number of steps in the OTYS Go! CRM module. The manual for the CRM Module contains instructions on how to create a web user account for the client.

The time sheet overview in the employer portal contains the following elements:

- Date filter, search by date
- Status filter, search by status:
    - Blank
    - Booked
    - Approved
    - Correction
- Candidate filter, search by candidates

To open a time sheet, the employer needs to double-click on the relevant period.

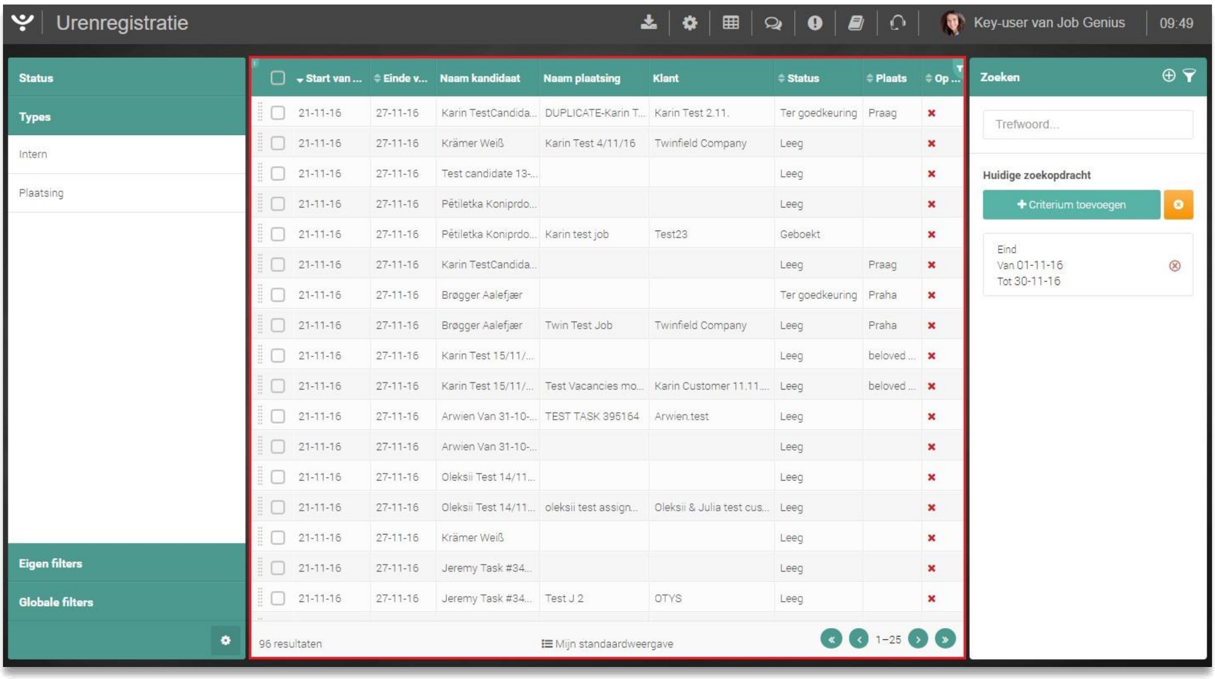


Dag/Datum	Manager Marketing, Intervet Nederland B.V. (test Bas)			Notities	Info
	Normaal	Vakantie	Ziek		
29-08-2011 maandag	8.00				🟧 8
30-08-2011 dinsdag	8.00				🟧 8
31-08-2011 woensdag	8.00				🟧 8
1-09-2011 donderdag	8.00				🟧 8
2-09-2011 vrijdag	8.00				🟧 8
3-09-2011 zaterdag	🟥	🟥	🟥		0
4-09-2011 zondag	🟥	🟥	🟥		0
Totalen	40	0	0		

Fig. 2 – Check time sheet in the employer portal

4 | TIME REGISTRATION IN OTYS GO!

Once the time sheets have been entered, they can be found in the Time Registration Module. When you open this module you will see an overview of all placements with time registration in the centre column.



☐	Start van ...	Einde v...	Naam kandidaat	Naam plaatsing	Klant	Status	Plaats	Op ...
☐	21-11-16	27-11-16	Karin TestCandida...	DUPLICATE-Karin T...	Karin Test 2.11.	Ter goedkeuring	Praag	✖
☐	21-11-16	27-11-16	Krämer Weiß	Karin Test 4/11/16	Twinfield Company	Leeg		✖
☐	21-11-16	27-11-16	Test candidate 13-...			Leeg		✖
☐	21-11-16	27-11-16	Pětiletka Koniprdo...			Leeg		✖
☐	21-11-16	27-11-16	Pětiletka Koniprdo...	Karin test job	Test23	Geboekt		✖
☐	21-11-16	27-11-16	Karin TestCandida...			Leeg	Praag	✖
☐	21-11-16	27-11-16	Brøgger Aalefjær			Ter goedkeuring	Praha	✖
☐	21-11-16	27-11-16	Brøgger Aalefjær	Twin Test Job	Twinfield Company	Leeg	Praha	✖
☐	21-11-16	27-11-16	Karin Test 15/11/...			Leeg	beloved ...	✖
☐	21-11-16	27-11-16	Karin Test 15/11/...	Test Vacancies mo...	Karin Customer 11.11....	Leeg	beloved ...	✖
☐	21-11-16	27-11-16	Arwien Van 31-10-...	TEST TASK 395164	Arwien.test	Leeg		✖
☐	21-11-16	27-11-16	Arwien Van 31-10-...			Leeg		✖
☐	21-11-16	27-11-16	Oleksii Test 14/11...			Leeg		✖
☐	21-11-16	27-11-16	Oleksii Test 14/11...	oleksii test assign...	Oleksii & Julia test cus...	Leeg		✖
☐	21-11-16	27-11-16	Krämer Weiß			Leeg		✖
☐	21-11-16	27-11-16	Jeremy Task #34...			Leeg		✖
☐	21-11-16	27-11-16	Jeremy Task #34...	Test J 2	OTYS	Leeg		✖

Eind
Van 01-11-16
Tot 30-11-16

Fig. 3 – Overview screen of all time sheets

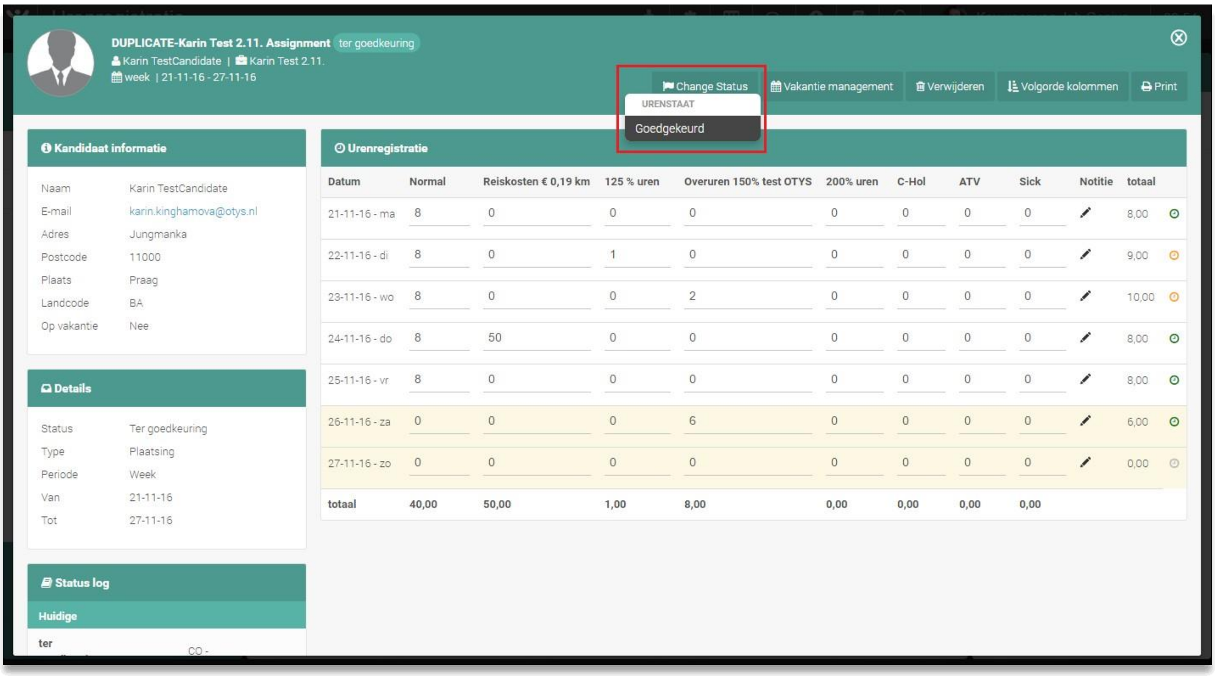
4.1 ENTER HOURS FROM THE TIME REGISTRATION MODULE

As mentioned in Chapter 3, the work hours are usually filled in by the relevant candidate. To manually enter the work hours for a placement yourself, you first use the search function to find the time sheet. Open the time sheet and enter the work hours in the diagram.
You can also do this for travel allowance, overtime, short-time work, absenteeism, other reimbursements and any notes. This depends on how this has been organised with the OTYS consultant and how the placement has been set. If all changes have been made correctly and the time sheet can be approved, it then needs to be submitted for approval. Click the 'Change status' button at the top of the time sheet and then select 'For approval'.

4.2 APPROVAL OF CANDIDATE'S WORKED HOURS

The client receives an email after the candidate submits their work hours for approval. This email contains a link so the completed time sheet can be approved by the client with just one click. If the client wants to make changes to the time sheet, they can do this by changing the work hours, making a note on this in the note field and clicking on approve. Next a correction button will appear. The work hours are then returned to the candidate by email. The note button is now green so the candidate can see which hours have been changed and what reason the client gave for this change.

If you still want to manually approve the hours in the Time Registration Module, open the time sheet in the overview. Then check the time sheet in the detail screen. After checking and making any edits based on the submitted time sheets, click 'Change status' and then select 'Approved'.


DUPLICATE-Karin Test 2.11. Assignment
ter goedkeuring
Karin TestCandidate | Karin Test 2.11.
week | 21-11-16 - 27-11-16
Change Status
URENSTAAT
Goedgekeurd
Vakantie management
Verwijderen
Volgorde kolommen
Print
Kandidaat informatie
Urenregistratie
Details
Status log
Huidige
ter
CO -

Naam Karin TestCandidate
E-mail karin.kinghamova@otys.nl
Adres Jungmanka
Postcode 11000
Plaats Praag
Landcode BA
Op vakantie Nee

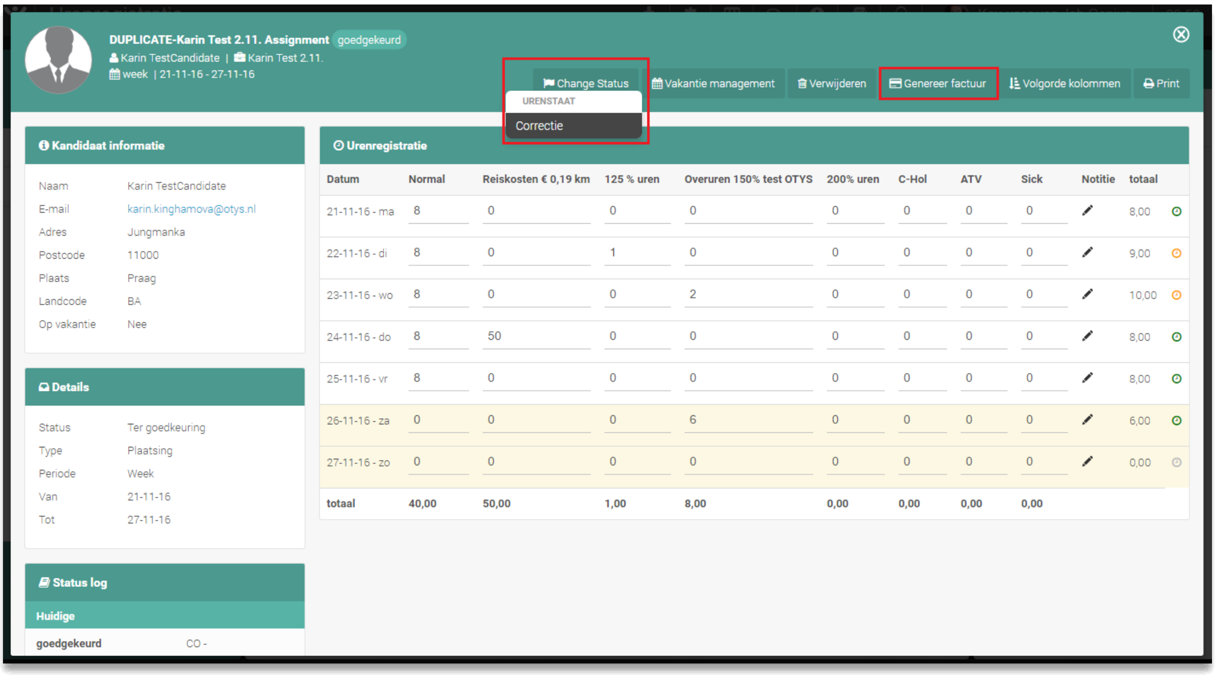
Status Ter goedkeuring
Type Plaatsing
Periode Week
Van 21-11-16
Tot 27-11-16

Datum	Normal	Reiskosten € 0,19 km	125 % uren	Overuren 150% test OTYS	200% uren	C-Hol	ATV	Sick	Notitie	totaal
21-11-16 - ma	8	0	0	0	0	0	0	0	✎	8,00
22-11-16 - di	8	0	1	0	0	0	0	0	✎	9,00
23-11-16 - wo	8	0	0	2	0	0	0	0	✎	10,00
24-11-16 - do	8	50	0	0	0	0	0	0	✎	8,00
25-11-16 - vr	8	0	0	0	0	0	0	0	✎	8,00
26-11-16 - za	0	0	0	6	0	0	0	0	✎	6,00
27-11-16 - zo	0	0	0	0	0	0	0	0	✎	0,00
totaal	40,00	50,00	1,00	8,00	0,00	0,00	0,00	0,00		

Fig. 4 – Manually approve entered work hours

4.3 EDITING AN APPROVED TIMESHEET

Once a time sheet has been approved, it cannot simply be edited. You need to open the candidate again and click 'Change status'. Then click 'Correction'. All fields are now editable again. Make the necessary changes, and then click 'Change status' to resend the time sheet 'For approval'. Once a time sheet has been approved, you can also generate an invoice. This is done in the Invoicing Module. More on processing invoices can be found in the manual for the Invoicing Module.


Change Status
URENSTAAT
Correctie
Vakantie management
Verwijderen
Genereer factuur
Volgorde kolommen
Print

DUPLICATE-Karin Test 2.11. Assignment goedgekeurd
Karin TestCandidate | Karin Test 2.11.
week | 21-11-16 - 27-11-16

Kandidaat informatie

Naam	Karin TestCandidate
E-mail	karin.kinghamova@otys.nl
Adres	Jungmanka
Postcode	11000
Plaats	Praag
Landcode	BA
Op vakantie	Nee

Details

Status	Ter goedkeuring
Type	Plaatsing
Periode	Week
Van	21-11-16
Tot	27-11-16

Status log

Huidige

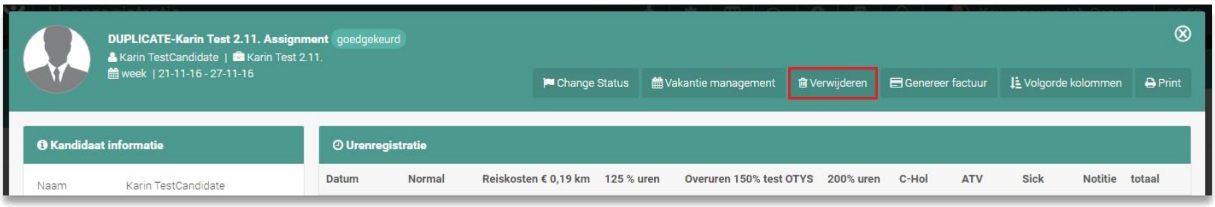
goedgekeurd	CO -

Urenregistratie

Datum	Normal	Reiskosten € 0,19 km	125 % uren	Overuren 150% test OTYS	200% uren	C-Hol	ATV	Sick	Notitie	totaal
21-11-16 - ma	8	0	0	0	0	0	0	0	✎	8,00
22-11-16 - di	8	0	1	0	0	0	0	0	✎	9,00
23-11-16 - wo	8	0	0	2	0	0	0	0	✎	10,00
24-11-16 - do	8	50	0	0	0	0	0	0	✎	8,00
25-11-16 - vr	8	0	0	0	0	0	0	0	✎	8,00
26-11-16 - za	0	0	0	6	0	0	0	0	✎	6,00
27-11-16 - zo	0	0	0	0	0	0	0	0	✎	0,00
totaal	**40,00**	**50,00**	**1,00**	**8,00**	**0,00**	**0,00**	**0,00**	**0,00**		

Fig. 5 – Correct time sheet and generate invoice

It is also possible to delete an entire time sheet. You do this by clicking on 'Delete'. You will be asked for confirmation, after which the entire time sheet will be deleted.


Change Status
Vakantie management
Verwijderen
Genereer factuur
Volgorde kolommen
Print

DUPLICATE-Karin Test 2.11. Assignment goedgekeurd
Karin TestCandidate | Karin Test 2.11.
week | 21-11-16 - 27-11-16

Kandidaat informatie

Naam Karin TestCandidate

Urenregistratie

Datum	Normal	Reiskosten € 0,19 km	125 % uren	Overuren 150% test OTYS	200% uren	C-Hol	ATV	Sick	Notitie	totaal

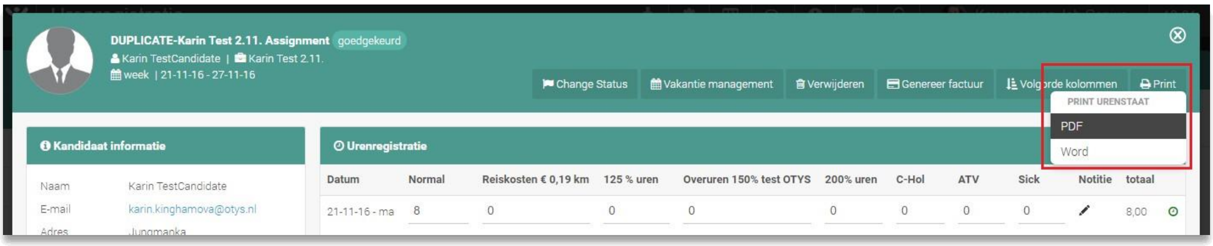
Fig. 6 – Delete time sheet

5 | CREATE AND EXPORT OVERVIEWS

5.1 PRINT A TIMESHEET

Each time sheet can be printed. This can be done by opening the time sheet in the overview. Then click the 'Print' button at the top right of the green bar. A drop-down menu appears where you can select either a PDF or Word print format.

After one of these formats has been selected, the time sheet is downloaded from the browser. When you open it, you can print the time sheet from the PDF or Word file.


DUPLICATE-Karin Test 2.11. Assignment
goedgekeurd
Karin TestCandidate | Karin Test 2.11.
week | 21-11-16 - 27-11-16
Change Status
Vakantie management
Verwijderen
Genereer factuur
Volgorde kolommen
Print
PRINT URENSTAAT
PDF
Word
Kandidaat informatie
Urenregistratie

Naam Karin TestCandidate
E-mail karin.kinghamova@otys.nl
Adres Jungmanka

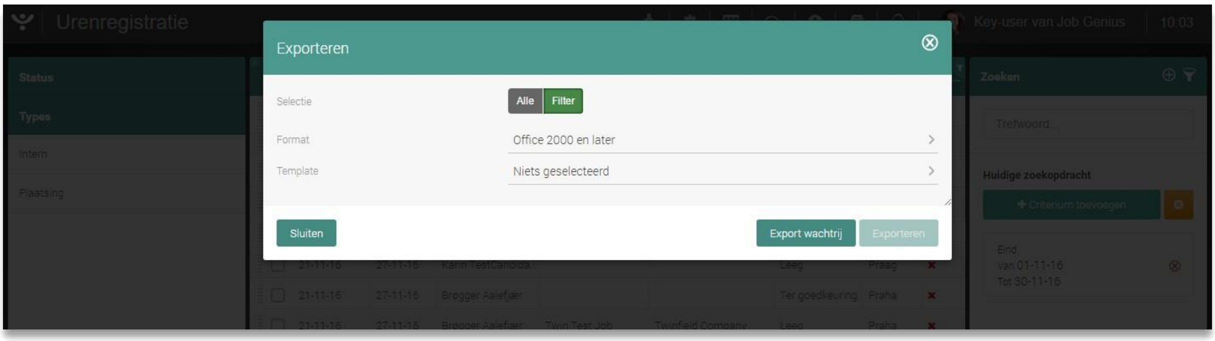
Datum	Normal	Reiskosten € 0,19 km	125 % uren	Overuren 150% test OTYS	200% uren	C-Hol	ATV	Sick	Notitie	totaal
21-11-16 - ma	8	0	0	0	0	0	0	0		8,00

Fig. 7 – Print time sheet in Word or PDF

5.2 EXPORT TIMESHEETS

In the overview of the Time Registration Module you can make an export of one or more time sheets. Use the filters or search function to select the time sheets you want to export. Then click on the 'Export' button at the top of the screen.

In the pop-up window, select whether you want to export all time sheets or only those you have filtered. Then specify the format you want to export and the template. In the drop-down menu behind 'Template', you can select previously created templates. After you click on 'Export', the file will be downloaded with the browser. If the file is too large to export it all at once, it is placed in the queue. You can see all the exports in the queue by clicking on 'Export queue'.


Urenregistratie
Key-user van Job Genius
10:03
Status
Types
Intern
Plaatsing
Zoeken
Trefwoord...
Huidige zoekopdracht
Criterium toevoegen
Exporteren
Alle
Filter
Sluiten
Export wachtrij
Exporteren

Selectie: Filter
Format: Office 2000 en later
Template: Niets geselecteerd

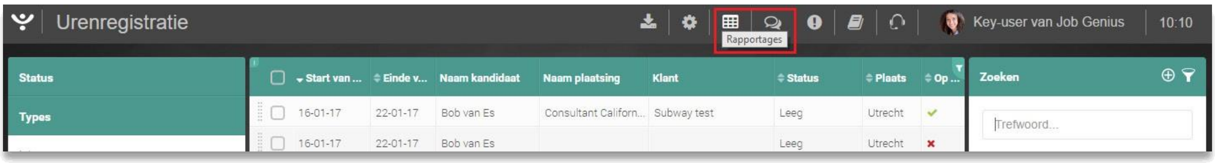
Eind
Van 01-11-16
Tot 30-11-16

Fig. 8 – Export time sheets from the overview screen

5.3 CREATE TIMESHEET REPORT

It is possible to make a report of all the time sheets currently in the system. This report can be useful for making comparisons between different candidates or creating a large overview over a longer period of time.

To search for a report, click on the 'Report' button at the top of the screen. This opens the report page. This shows the overview of all time sheets by default. There is a filter menu on the left side of the screen to help you compose a useful report.

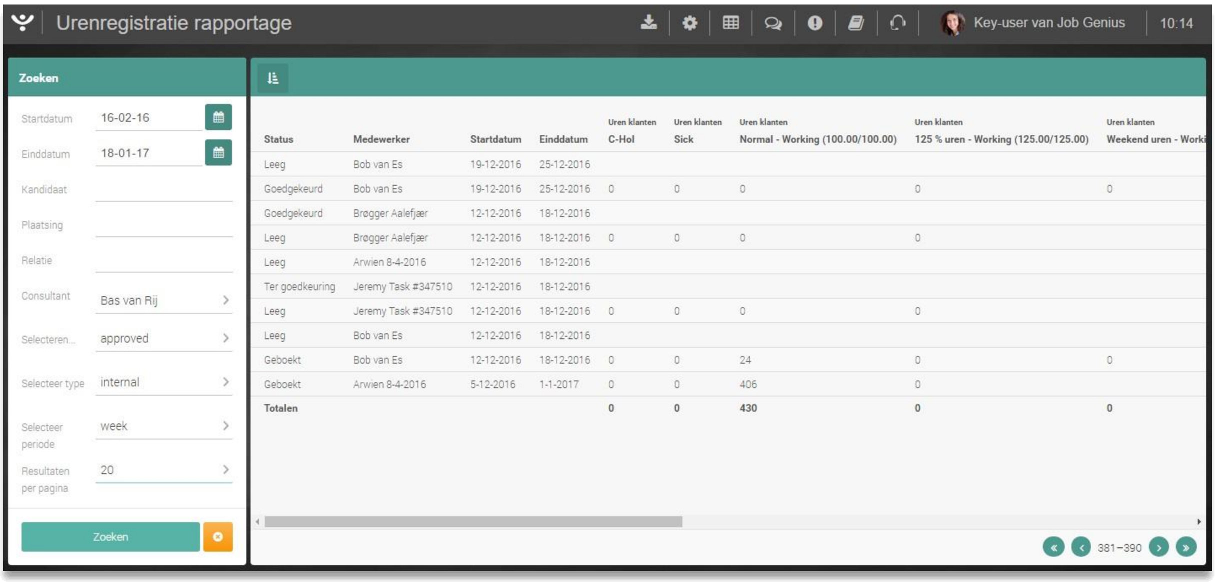


☐	Start van ...	Einde v...	Naam kandidaat	Naam plaatsing	Klant	Status	Plaats	Op ...
☐	16-01-17	22-01-17	Bob van Es	Consultant Californ...	Subway test	Leeg	Utrecht	✓
☐	16-01-17	22-01-17	Bob van Es			Leeg	Utrecht	✗

Fig. 9 – Open reporting screen

You can create the desired report using the following filters:

- Start date;
- End date;
- Candidate: Go to the 'Search' icon to select candidates to include in the report;
- Client: Go to the 'Search' icon to select clients to include in the report;
- Select a consultant;
- Select a status: e.g. 'approved', 'for approval', 'correction', ...;
- Select a type: e.g. 'Internal', 'Assignment', ...;
- Select a period: This concerns how the report is displayed: 'Week', '4 weeks', 'Month', ...;
- Results per page: ’10-100’.



Startdatum: 16-02-16
Einddatum: 18-01-17
Kandidaat:
Plaatsing:
Relatie:
Consultant: Bas van Rij
Selecteren...: approved
Selecteer type: internal
Selecteer periode: week
Resultaten per pagina: 20

Status	Medewerker	Startdatum	Einddatum	Uren klanten C-Hol	Uren klanten Sick	Uren klanten Normal - Working (100.00/100.00)	Uren klanten 125 % uren - Working (125.00/125.00)	Uren klanten Weekend uren - Worki
Leeg	Bob van Es	19-12-2016	25-12-2016					
Goedgekeurd	Bob van Es	19-12-2016	25-12-2016	0	0	0	0	0
Goedgekeurd	Brøgger Aalefjær	12-12-2016	18-12-2016					
Leeg	Brøgger Aalefjær	12-12-2016	18-12-2016	0	0	0	0	
Leeg	Arwien 8-4-2016	12-12-2016	18-12-2016					
Ter goedkeuring	Jeremy Task #347510	12-12-2016	18-12-2016					
Leeg	Jeremy Task #347510	12-12-2016	18-12-2016	0	0	0	0	
Leeg	Bob van Es	12-12-2016	18-12-2016					
Geboekt	Bob van Es	12-12-2016	18-12-2016	0	0	24	0	0
Geboekt	Arwien 8-4-2016	5-12-2016	1-1-2017	0	0	406	0	
Totalen				**0**	**0**	**430**	**0**	**0**

Fig. 10 – Set filters for your report

If the filters you want are set, click 'Search' to search for the desired report. If your search gives multiple results, you can use the 'Sort' icon in the upper left of the list to sort by 'Type', 'Status', 'Period', 'Start date' and 'End date'.