



## **Business Operating Software System**

**Maintenance Release [V 0.1]**

Presented by ICTLabs

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# 1 Business Operating Software System (BOSS)

**Welcome to the Business Operating Software System user manual!**

## **Introduction**

We are thrilled to introduce you to our latest software solution, Business Operating Software System, herein further referred to as; BOSS. The software is designed to streamline your employee submissions and enhance productivity. This comprehensive user manual is crafted to equip you with all the necessary information to effectively utilize and leverage the BOSS features to their fullest potential.

## **Your Role in Adopting**

As an integral member of our team, your understanding and proficiency in using the new system are paramount to its successful integration into our operations. Whether you are a seasoned user or new to such systems, this manual serves as your comprehensive guide to navigate through the system with ease.

## **What to Expect**

This manual is structured to provide you with step-by-step instructions, insightful tips, and guidance to address any challenges you may encounter. The basic navigation for each section is tailored to cater to your specific needs and ensure a seamless experience with BOSS.

## **How to Use This Manual**

To maximize the benefits of this manual, we recommend following the outlined sections in sequential order. However, feel free to jump to specific topics from the table of content, as per your immediate requirements. Additionally, don't hesitate to reach out to us for further assistance or clarification.

## **Employee Basic Tasks**

As the recommended and outlined sections, the following links will guide you with a quick guide on the basic repetitive actions that will be required from you as the employee.

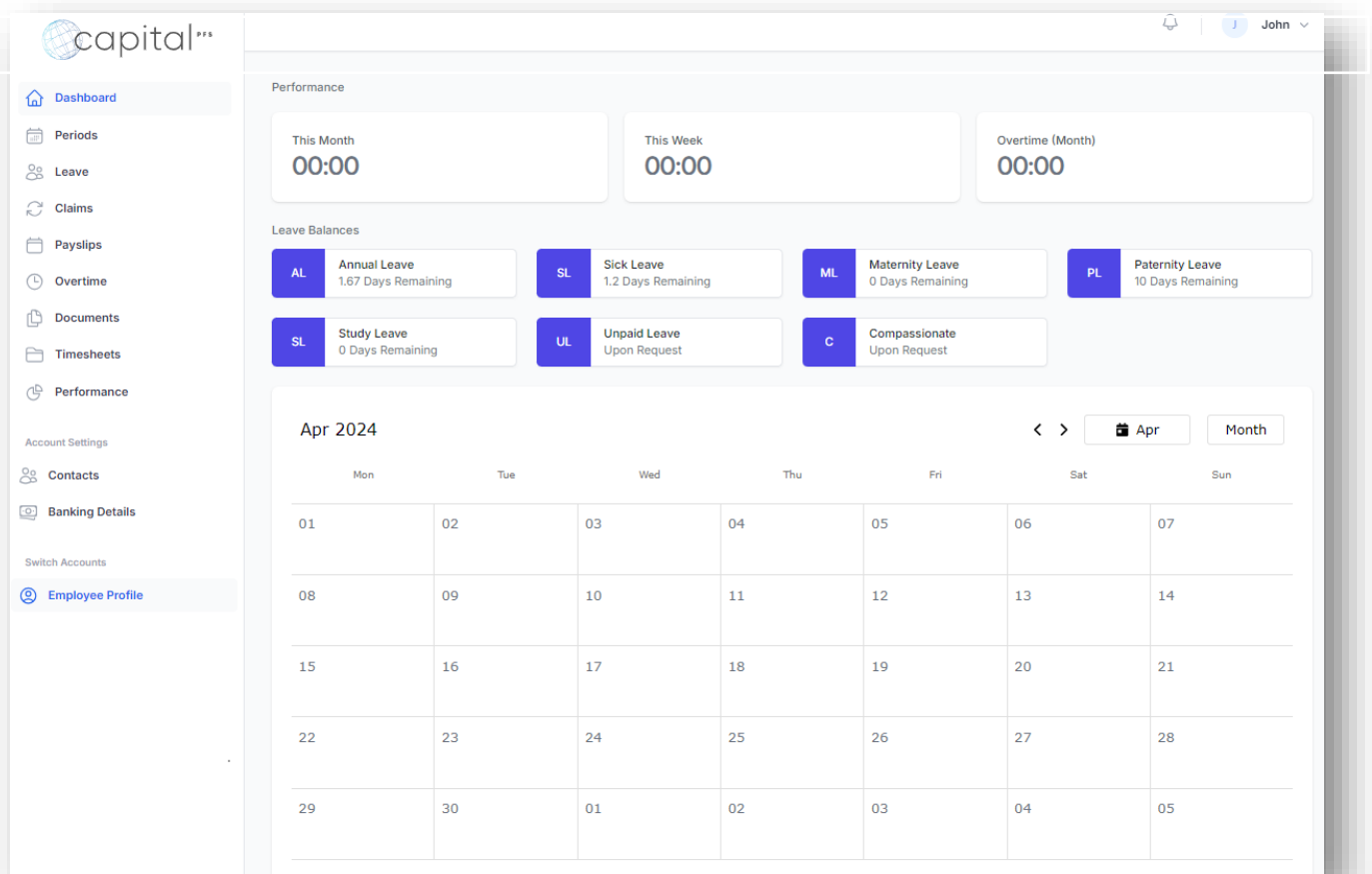
- **Claim Submissions**
- **Overtime Submissions**
- **Timesheets Submissions**
- **Period Submissions**

Let's embark on this journey together and unlock the full potential of BOSS!

## 2. Employee Dashboard

Your system dashboard view serves as a centralized hub where you can access key information and system functionalities in a visually intuitive manner. This section provides a breakdown of what you will find on the dashboard once logged in.

### Responsive Image



## 2.2 Top Section

The top section of your dashboard provides the following quick navigations:

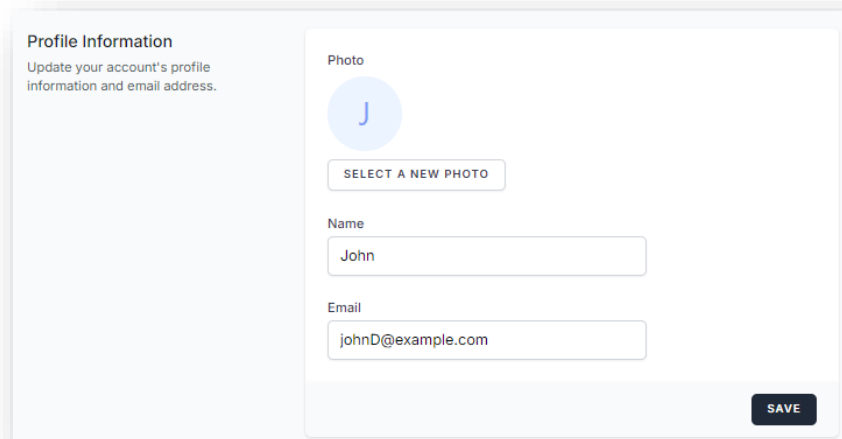
### 2.2.1 Your Profile

Available on the top-right corner, once the arrow next to your was selected the following actions can be taken:

#### 2.2.1-a Profile

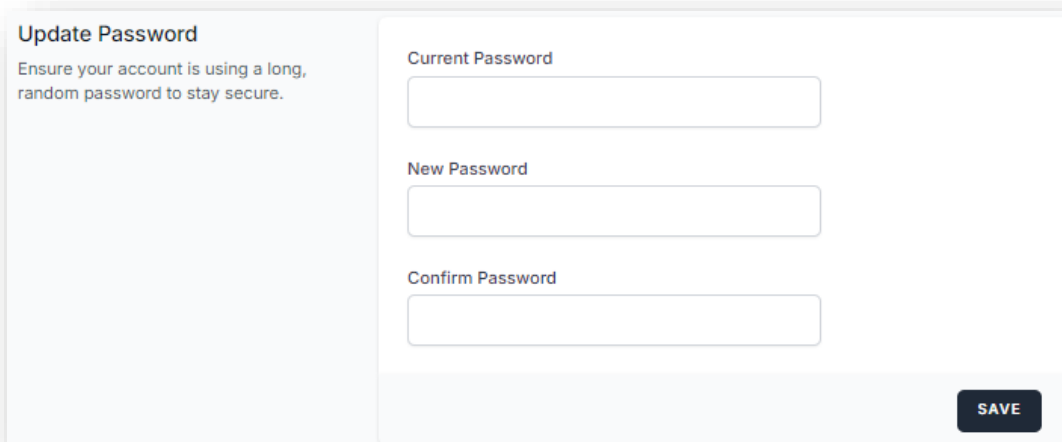
When profile is selected, you will have an overview of your current profile settings and basic information, the following sections will be displayed:

**Profile Information;** Allows you to change your user profile picture, name and email, updating your profile information.



The screenshot shows a 'Profile Information' form. On the left, there is a title 'Profile Information' and a subtitle 'Update your account's profile information and email address.' The main form area on the right contains a 'Photo' section with a circular profile picture placeholder showing the letter 'J' and a button labeled 'SELECT A NEW PHOTO'. Below this are input fields for 'Name' (containing 'John') and 'Email' (containing 'johnD@example.com'). A dark blue 'SAVE' button is located at the bottom right of the form.

**Update Password;** Allows you to stay secure by updating your current password if needed. Ensure to use a long password as an extra security measure.



The screenshot shows an 'Update Password' form. On the left, there is a title 'Update Password' and a subtitle 'Ensure your account is using a long, random password to stay secure.' The main form area on the right contains three input fields labeled 'Current Password', 'New Password', and 'Confirm Password'. A dark blue 'SAVE' button is located at the bottom right of the form.

**Two Factor Authentication;** By enabling the two-factor authentication, you can add additional security to your account. You will be prompted for a secure random token that can be retrieved from your phone's Google Authentication application in order to enable this feature.

**Two Factor Authentication**

Add additional security to your account using two factor authentication.

**You have not enabled two factor authentication.**

When two factor authentication is enabled, you will be prompted for a secure, random token during authentication. You may retrieve this token from your phone's Google Authenticator application.

**ENABLE**

**Browser Session;** Your recent browser sessions will be listed in this section. You can manage and log out of your active sessions on other browsers or devices if necessary.

Should you feel that your account could have been compromised, it is recommended that you change your password.

**Two Factor Authentication**

Add additional security to your account using two factor authentication.

**You have not enabled two factor authentication.**

When two factor authentication is enabled, you will be prompted for a secure, random token during authentication. You may retrieve this token from your phone's Google Authenticator application.

**ENABLE**

### 2.2.1-c Logout

**Log Out;** The last selectable option from the profile section, will log you out of the system. If this option was selected, you can login to your account with your current user name and set password.

Profile

Log Out

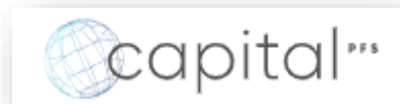
### 2.2.2 Notifications

System generated notifications will be listed when the bell icon, available next to your name is selected.



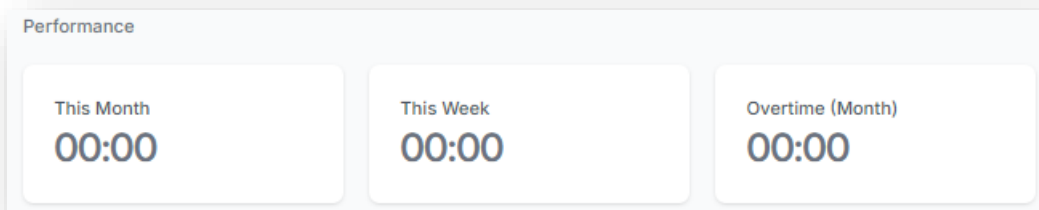
### 2.2.3 Company Logo

Available to the far-left corner of the top section, when selected, the company logo will redirect you back to the dashboard view from any page on the system that you are currently viewing.



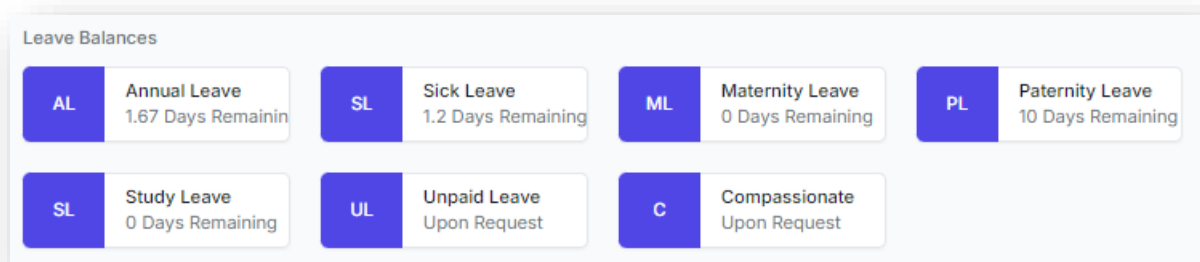
### 2.3 Performance

From the dashboard, the **Performance** section provides an overview of your hours submitted for the month or the week, and the amount of overtime submitted for the current month.



### 2.4 Leave Balance

Your current leave balances can be viewed from your dashboard, under **Leave Balances**. The different leave types, and available leave balance for each are presented on the home screen.

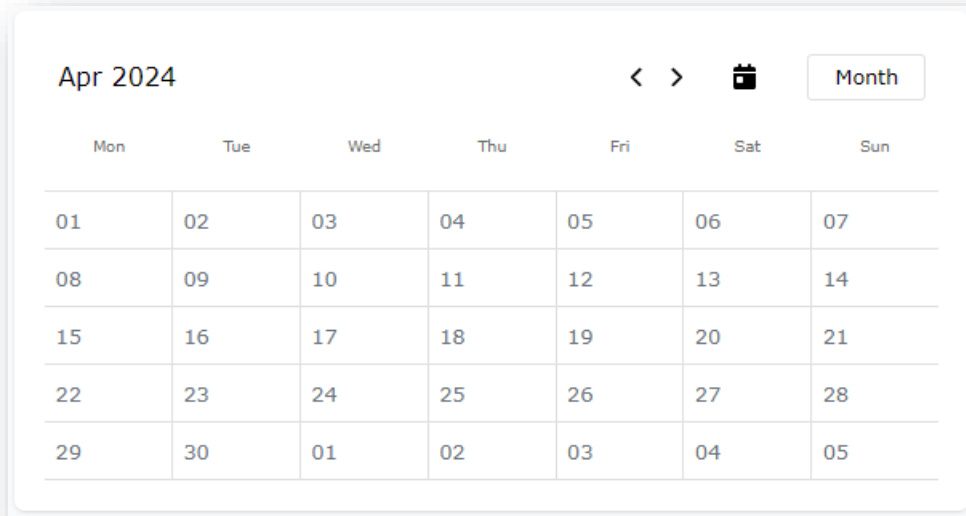


Leave balances will updated once a leave application is approved by a manager.



## 2.5 Calendar

The calendar presents a quick view for leave days approved, taken or upcoming.



By default, the calendar is visible from the home page, presents the current month. You can filter the presented calendar information presented on two ways:

### By Month

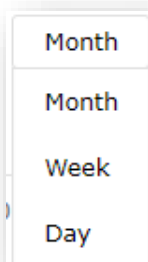
To view a different month, select the previous ( < ) arrow for a previous month, or the later ( > ) arrow for an upcoming month.



### By Time Interval

By default, the presented view will be for a full calendar month. In order to change the view, click on; Month.

The month selector, allows you to choose between; month, week or day view.



### 3. Employee Digital Signature

#### NOTE

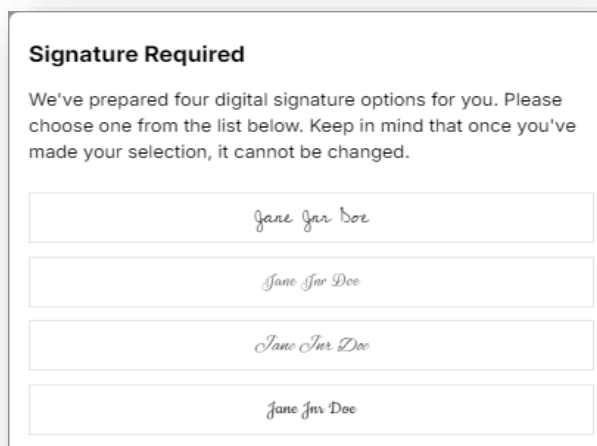
For certain actions and requests, the system requires your DIGITAL SIGNATURE in order to continue. The digital signature is none repeating action. Once a signature was setup for your profile it cannot be changed.

#### Digital Signature Setup

For certain system actions related to your profile, a digital signature is required in order to proceed. The signature setup will be prompted from the system upon the users first action that requires a signature.

The steps follow:

**Step 1:** System will provide a notification requesting you to select your digital signature.



**Signature Required**

We've prepared four digital signature options for you. Please choose one from the list below. Keep in mind that once you've made your selection, it cannot be changed.

- Jane Jnr Doe
- Jane Jnr Doe
- Jane Jnr Doe
- Jane Jnr Doe

**Step 2:** Click on your preferred signature to will be used for all your applications and submissions.




- Jane Jnr Doe
- Jane Jnr Doe
- Jane Jnr Doe
- Jane Jnr Doe

#### Result:

The system will create your signature that will be associated to your account going forward. Remember, you only need to perform this action once.

#### Signature Required

We've prepared four digital signature options for you. Please choose one from the list below. Keep in mind that once you've made your selection, it cannot be changed.

 Setting up your signature, please wait...

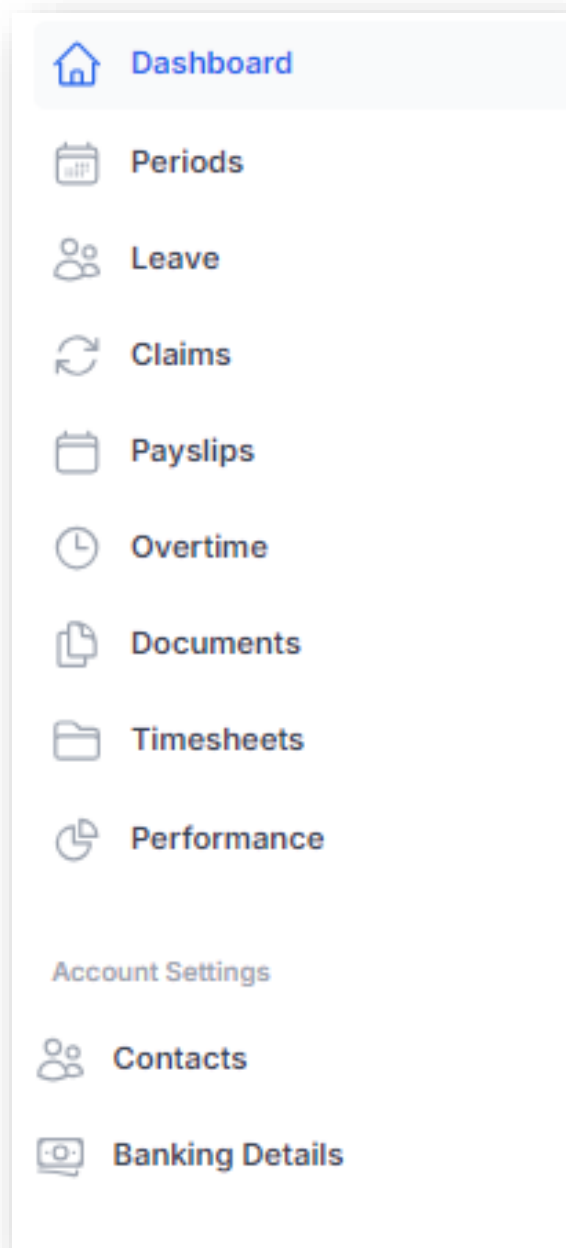
## 4. Employee Menu

The side menu, always available on the left of your screen, provides navigation to all employee tasks and sections that can be accessed by an employee. The menu is always available on the left from any section on the system.

From the employee menu, all employee actions are displayed prominently for quick access.

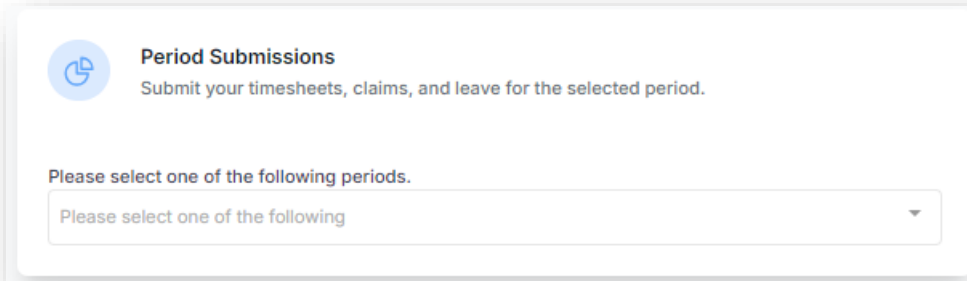
For the purpose of this section, we will only briefly review the sections available from the employee menu.

📱 Responsive Image



## 5 Employee Periods

The first section on your side menu provides you with access to view, and submit **Period Submissions**.

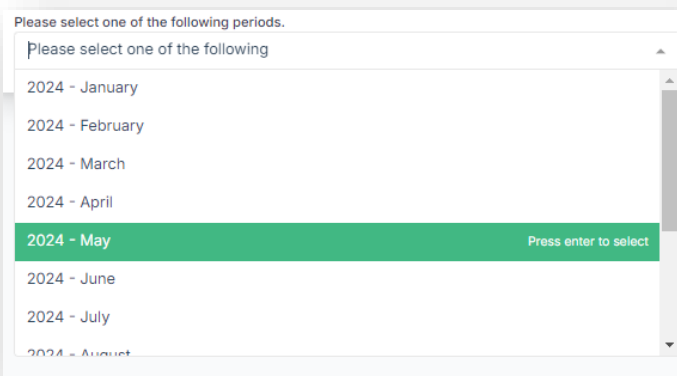


The screenshot shows the 'Period Submissions' header. It features a blue circular icon with a document and a checkmark. To the right of the icon, the text reads 'Period Submissions' followed by 'Submit your timesheets, claims, and leave for the selected period.' Below this, there is a prompt 'Please select one of the following periods.' and a dropdown menu with the placeholder text 'Please select one of the following'.

The following describes the actions that can be performed by the employee:

### 5.1 View Period Submissions

**Step 1:** By clicking on the drop-down arrow on the left, you will be presented with all the available months.



The screenshot shows the dropdown menu that appears after clicking the arrow. It lists months from '2024 - January' to '2024 - August'. The '2024 - May' option is highlighted in green and includes a 'Press enter to select' button to its right. The prompt 'Please select one of the following periods.' is visible at the top of the dropdown.

**Step 2:** Once you are on the month that you want to view, press enter to select the month.

**Result:** The submission for the selected month will be displayed, including a summary of submitted applications, including; overtime, claims, leave requests, and timesheets.

Timesheets that was declined and approved will also be listed as part of this view.

#### NOTE

When a time period is viewed, it does not mean that it was send for approval. The overview allows you to view, correct, or add any missing requests or claims.

Summary of submitted applications:

The screenshot shows a dashboard titled "Period Submissions" with the instruction "Submit your timesheets, claims, and leave for the selected period." Below this is a dropdown menu set to "2024 - May". The main section, "Submissions for May 2024", includes a "Submit 2024 - May Period" button and six summary cards:

Category	Value
Overtime Submissions (The amount of overtime applications submitted for 2024...)	3
Claim Submissions (The amount of claims submitted for 2024 - May)	1
Approved Leave Days (The amount of approved leave days for 2024 - May)	0
Timesheets Submitted (The amount of timesheets submitted for 2024 - May)	24
Timesheets Declined (The amount of timesheets declined for 2024 - May)	0
Timesheets Approved (The amount of timesheets approved for 2024 - May)	0

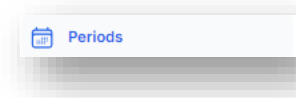
## 5.2 Submit Period Submissions

Also available from the Periods sections, is the ability to submit your submissions for a selected period.

The following will describe the process:

**Prerequisites:** Ensure that all your additional submissions are up to date before you submit a period for approval.

**Step 1:** Select **Periods** available from the left menu.



**Step 2:** Select the period from the list for which you will be submitting your claims and timesheets.


The screenshot shows the "Period Submissions" section with a dropdown menu open. The menu lists "2024 - May" and "2024 - June". The "2024 - June" option is highlighted in green. A "Press enter to select" prompt is visible at the bottom right of the dropdown.

**Step 3: Review** the summary for the selected period.

<b>Overtime Submissions</b> The amount of overtime applications submitted for 2024 - May <b>3</b>	<b>Claim Submissions</b> The amount of claims submitted for 2024 - May <b>1</b>
<b>Approved Leave Days</b> The amount of approved leave days for 2024 - May <b>0</b>	<b>Timesheets Submitted</b> The amount of timesheets submitted for 2024 - May <b>24</b>
<b>Timesheets Declined</b> The amount of timesheets declined for 2024 - May <b>0</b>	<b>Timesheets Approved</b> The amount of timesheets approved for 2024 - May <b>0</b>

**Step 4:** Click on: **Submit** if you are satisfied with the information captured and indicated for the selected period.

**NOTE:** If you have any missing information, you will be notified of such. If necessary, cancel the submissions and update the required fields.

**Warning - Incomplete Period**

1. You have not submitted any overtime for this period.
2. You have not submitted any claims for this period.
3. You have not submitted any timesheets for this period.

**Submit Period**Cancel Submission

**Step 5:** If you are satisfied with the content of your period submission, proceed to **Submit** the application for approval by clicking on the button.

**Submit 2024 - June Period**

**Result:** Your Period Submission for the selected month, will be send and notified to your manager for approval.

**NOTE**

The responsibility remains with you as the employee to ensure that all the required claims, overtime, and timesheets are submitted for each period.

Once a Period Submission was processed for approval, it will be locked and changes or updates can no longer be made. Should you need to add additional information or claims for a period, the submission must first be declined by your manager in order to submit the period submission from anew.

 **Side Menu**

## 6 Employee Leave

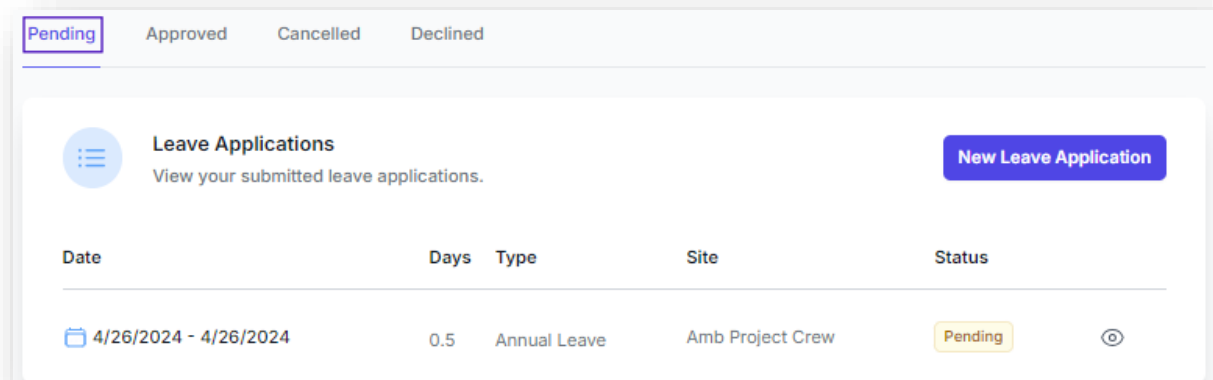
By the end of this section, you'll be equipped with the knowledge to effortlessly manage your leave applications like a pro.

This section will describe the views and actions available when **Leave** is selected from the menu.

### 6.1 The Leave Page

Once selected, the following can be viewed:

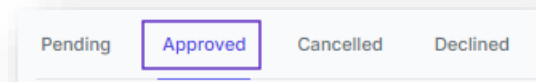
**Pending Leave Applications**, is displayed by default once Leave was selected.



The screenshot shows the 'Pending Leave Applications' page. At the top, there are four tabs: 'Pending' (selected), 'Approved', 'Cancelled', and 'Declined'. Below the tabs is a header section with a menu icon, the title 'Leave Applications', a subtitle 'View your submitted leave applications.', and a 'New Leave Application' button. The main content is a table with the following columns: 'Date', 'Days', 'Type', 'Site', and 'Status'. There is one row of data: '4/26/2024 - 4/26/2024', '0.5', 'Annual Leave', 'Amb Project Crew', and 'Pending'.

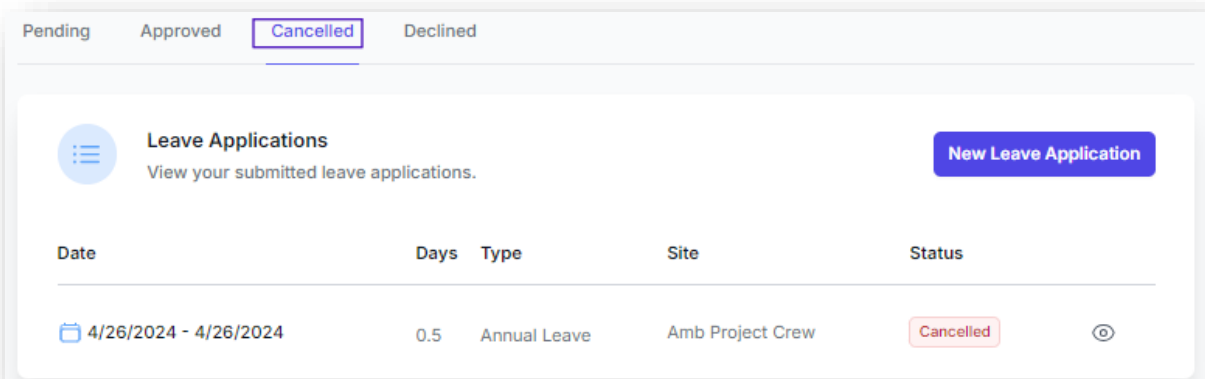
Date	Days	Type	Site	Status
4/26/2024 - 4/26/2024	0.5	Annual Leave	Amb Project Crew	Pending

**Approved Leave**, can be viewed once selected from the top section.



The screenshot shows the 'Approved Leave Applications' page. At the top, there are four tabs: 'Pending', 'Approved' (selected), 'Cancelled', and 'Declined'.

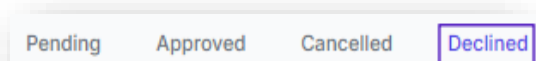
**Cancelled Leave**, will display leave requests that was cancelled by the employee.



The screenshot shows the 'Cancelled Leave Applications' page. At the top, there are four tabs: 'Pending', 'Approved', 'Cancelled' (selected), and 'Declined'. Below the tabs is a header section with a menu icon, the title 'Leave Applications', a subtitle 'View your submitted leave applications.', and a 'New Leave Application' button. The main content is a table with the following columns: 'Date', 'Days', 'Type', 'Site', and 'Status'. There is one row of data: '4/26/2024 - 4/26/2024', '0.5', 'Annual Leave', 'Amb Project Crew', and 'Cancelled'.

Date	Days	Type	Site	Status
4/26/2024 - 4/26/2024	0.5	Annual Leave	Amb Project Crew	Cancelled

**Declined Leave**, refers to of leave applications that was declined by your manager.

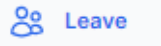



The screenshot shows the 'Declined Leave Applications' page. At the top, there are four tabs: 'Pending', 'Approved', 'Cancelled', and 'Declined' (selected).

## 6.2 Submitting a Leave Application

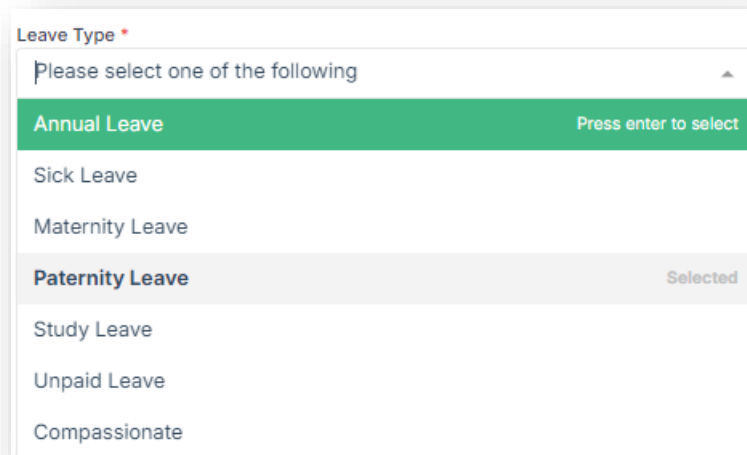
You can apply for any available leave type from the **Leave** section. The following steps describes the process.

### Prerequisites:

- From the side menu, click on; **Leave** 
- Then, once navigated to the leave section, click on; New Leave Application 

### The leave application process explained:

**Step 1:** Select the **Leave Type** from the drop-down list.



Leave Type \*

Please select one of the following

- Annual Leave Press enter to select
- Sick Leave
- Maternity Leave
- Paternity Leave** Selected
- Study Leave
- Unpaid Leave
- Compassionate

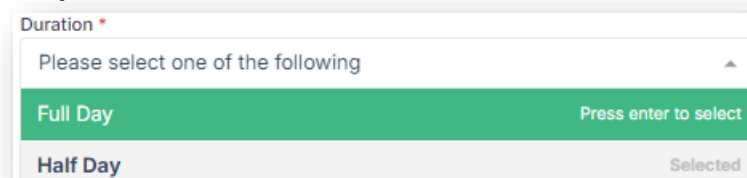
**Step 2:** Select your leave **From** and **To** date



From To

04/29/2024 04/29/2024

**Step 3:** Select the **Duration** for the requested time period.

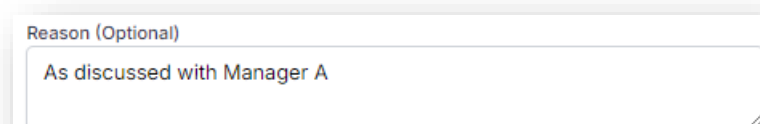


Duration \*

Please select one of the following

- Full Day Press enter to select
- Half Day** Selected

**Step 4:** (Optional) If you have a reason or note to add for the leave applications, it can be typed in the provided **Reason** box. Remember, clarity is key for swift approval.



Reason (Optional)

As discussed with Manager A



**Step 5:** In the case of any **Additional Files** supporting your leave application, you can add the files in the provided section.

Additional Files

Drop files here to upload

**Step 6:** Before you submit your request, you can review your leave balance for the requested leave type, available to the left of the leave application form.

🕒 Leave Application

Please complete the form to create a new leave application.

**Your current leave balance for Annual Leave**

You currently have **1.67** days leave remaining.

**Projected Leave Balance**

You will have **1.17** days leave remaining after this application.

**Step 7:** Review your request to ensure all information is accurate. Double-checking now saves time later!

**Step 8:** Click the '**Submit Request**' button. Your request will be sent directly to your manager for approval.

**SUBMIT REQUEST**

**Result:** As soon as the request was submitted, it will be sent directly to your manager for approval.

From the Leave page the request will now be visible from the **Pending** leave section.


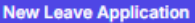
Date	Days	Type	Site	Status
📅 4/29/2024 - 4/29/2024	0.5	Annual Leave	Amb Project Crew	Pending

## 6.3 View a Pending Leave Application

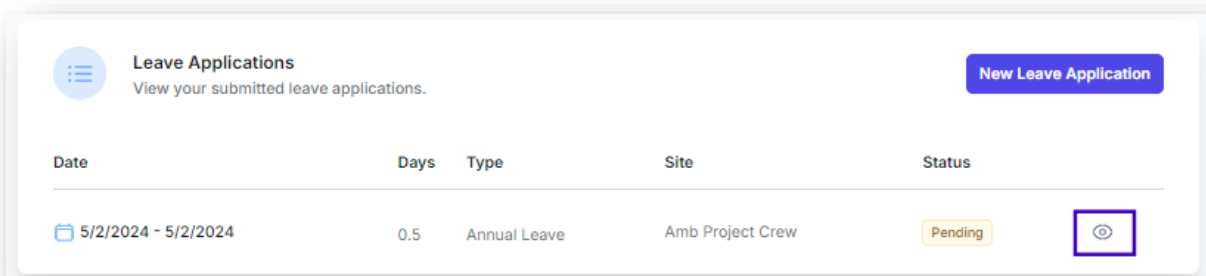
If not yet approved, your pending leave applications can be viewed from the pending leave section.

### How to view a pending leave application:

#### Prerequisites:

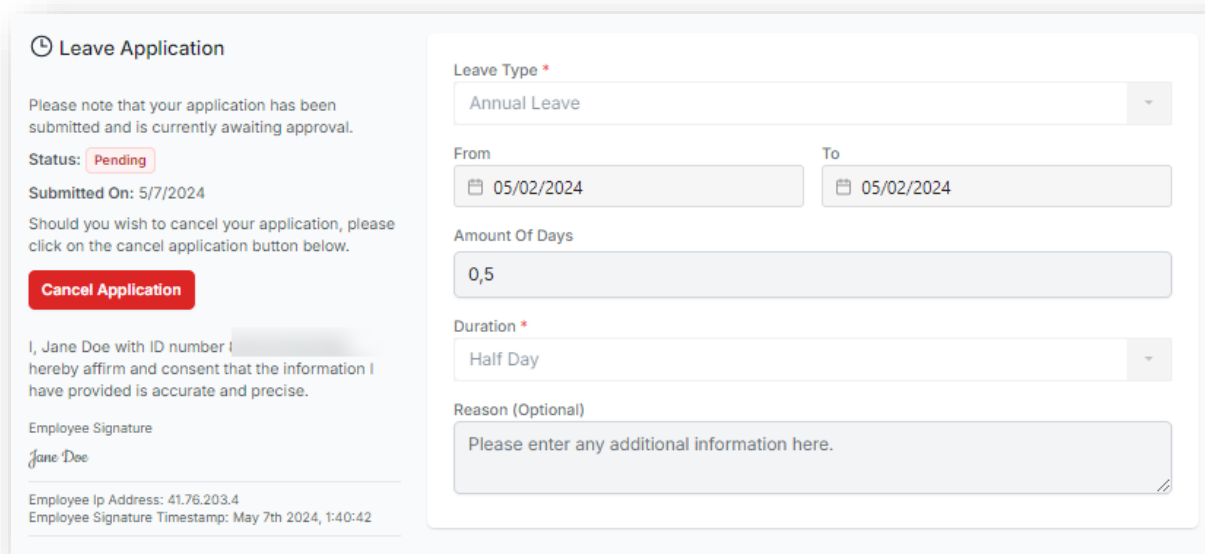
- From the side menu, click on; **Leave** 
- Then, once navigated to the leave section, click on; New Leave Application 

**Step 1:** From the pending leave section, click on the **'view'**, or eye icon next to the application you want to view.



**Result:** The selected leave application can be viewed, including the leave type, dates, duration, and any additional information, if available. From the leave **'view'**, an application can also be cancelled.

*The leave cancellation process is discussed in the next section of this chapter.*



The screenshot shows the 'Leave Application' view form. On the left, there's a sidebar with the title 'Leave Application' and a clock icon. It contains a message: 'Please note that your application has been submitted and is currently awaiting approval.' Below this, the status is 'Pending' in a red box, and the submission date is 'Submitted On: 5/7/2024'. A red 'Cancel Application' button is present. At the bottom of the sidebar, there's a signature area for 'Jane Doe' with her ID number and a timestamp: 'Employee Ip Address: 41.76.203.4' and 'Employee Signature Timestamp: May 7th 2024, 1:40:42'. The main form area on the right contains fields for 'Leave Type' (set to 'Annual Leave'), 'From' and 'To' dates (both '05/02/2024'), 'Amount Of Days' (set to '0,5'), 'Duration' (set to 'Half Day'), and a 'Reason (Optional)' text area with the placeholder 'Please enter any additional information here.'.

## 6.4 Cancel a Pending Leave Application

When you are clicking on the 'view' icon next to a leave application, not only can you view the request, you can also cancel the leave if it is no longer required.

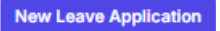
**In only three steps, you can cancel your leave application:**

**Prerequisites:**

a. From the side menu, click on; **Leave**

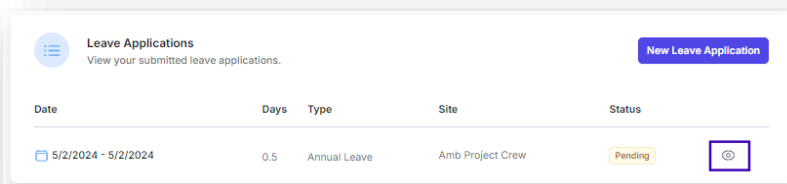


b. Then, once navigated to the leave section, click on; New Leave Application

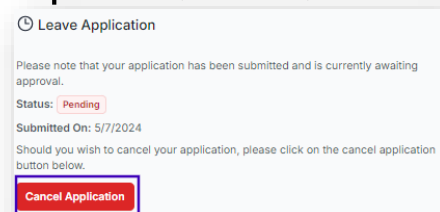


On the redirected page, pending leave application is the first view presented.

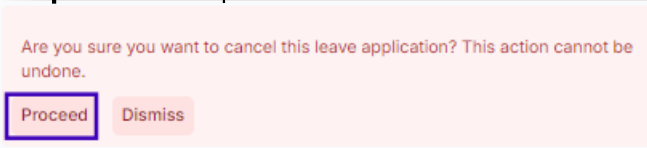
**Step 1:** From the pending leave section, click on the '**view**' icon to open the leave request.



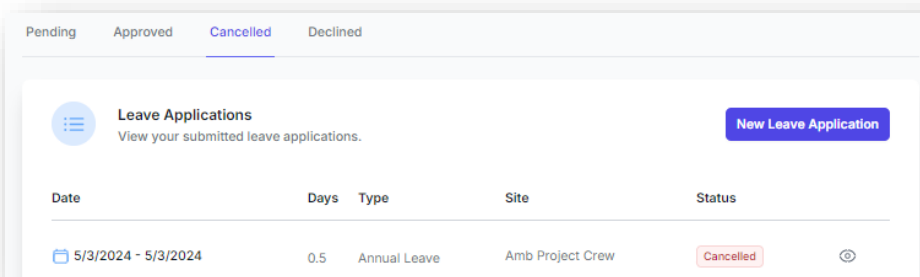
**Step 2:** Next, click on; '**Cancel Application**' to start the process



**Step 3:** To complete the leave cancellation, click on '**Proceed**'.



**Result:** You will be redirected to the '**Cancelled Leave Applications**' section, to where you cancelled leave was moved.



That brings us to the end of employee leave submissions. With our intuitive employee portal, managing your leave has never been easier.



## 7 Claims

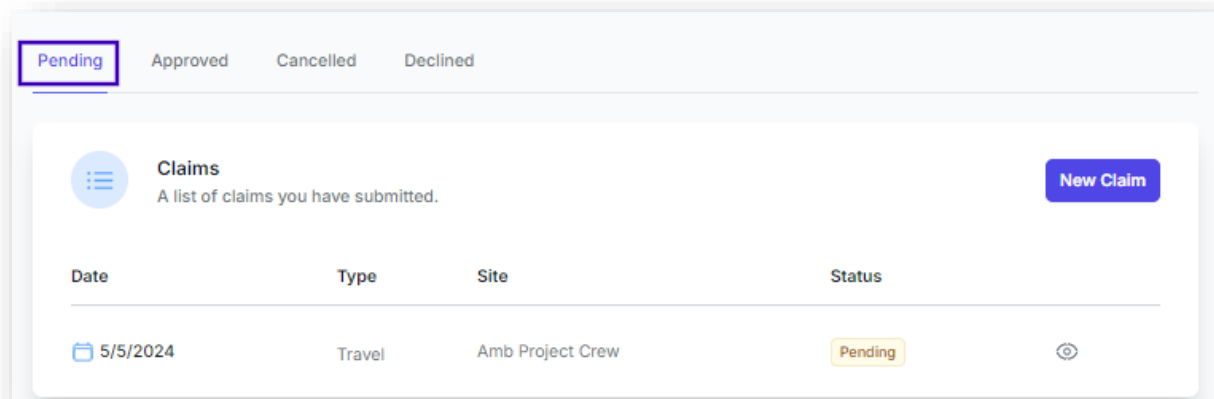
The following section will guide you in order to harness the full power of our Employee Portal to effortlessly submit **Claims**.

In this section will look at the views and actions available when **Claims** is selected from the menu.

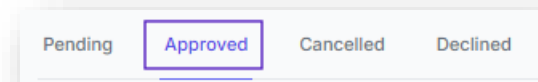
### 7.1 The Claims Page

Once selected, the following can be viewed:

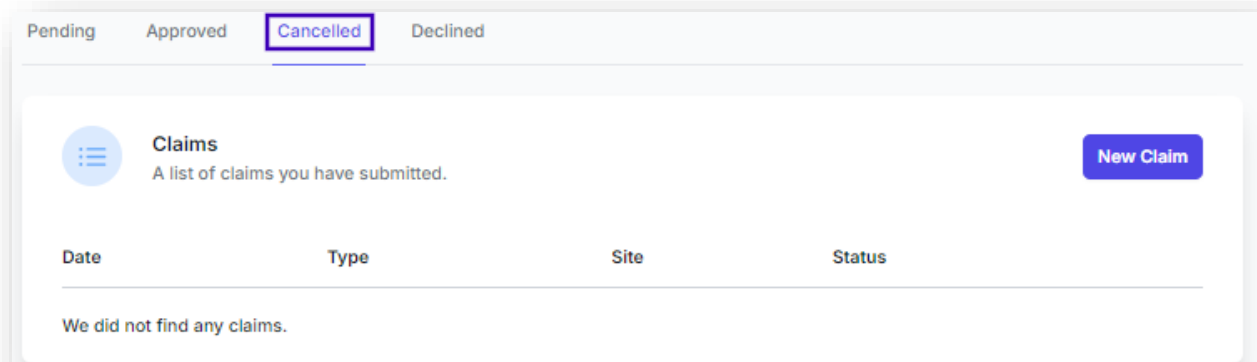
**Pending Claims Applications**, is displayed by default once Leave was selected.



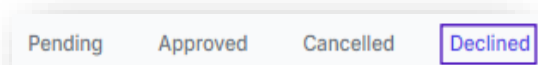
**Approved Claims**, can be viewed once selected from the top section.



**Cancelled Claims**, will display leave requests that was cancelled by the employee.



**Declined Leave**, refers to of leave applications that was declined by your manager.



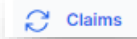
## 7.2 Submitting a New Claim

You can submit different types of claims for approval, from the **Claims** section. The following steps describes the process.

### The claim submission process explained:

#### Prerequisites:

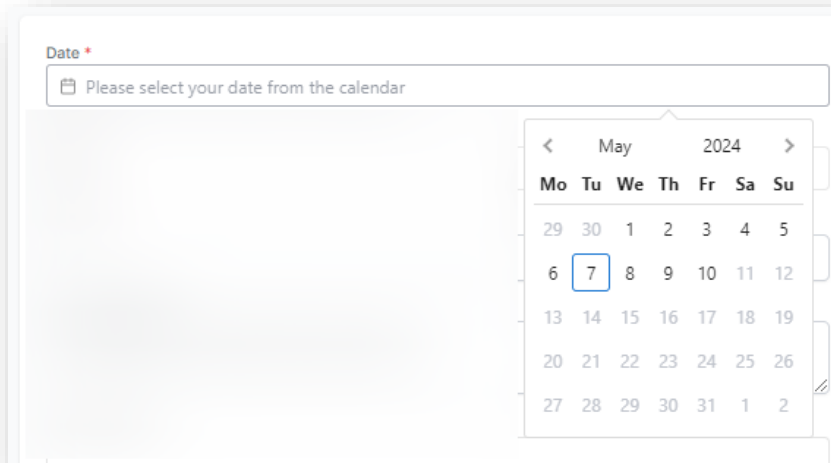
a. From the side menu, click on; **Claims**



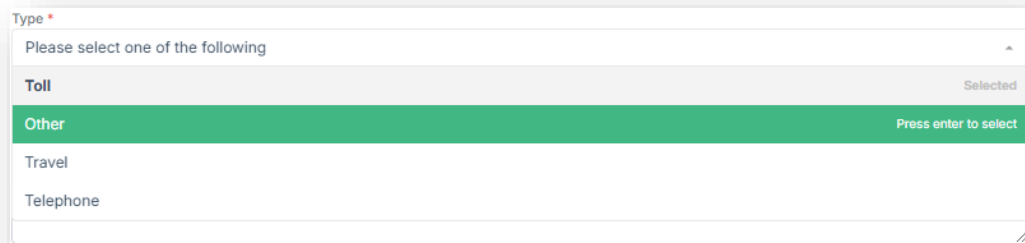
b. Then, once navigated to the claims section, click on; **New Claim**



**Step one:** Start by selecting a day for which you are submitting your claim request.

A date selection interface. It features a text input field labeled "Date \*" with a calendar icon and the placeholder text "Please select your date from the calendar". Below the input field is a calendar for May 2024. The calendar shows days from 29 to 31, with the 7th of May highlighted by a blue border.

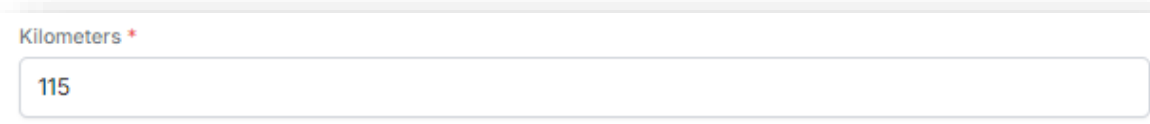
**Step two:** Select the type of claim you're submitting. Whether it's an expense report, travel reimbursement, or any other category, our system caters to your needs.

A dropdown menu for selecting the type of claim. The label "Type \*" is at the top. The dropdown is open, showing a list of options: "Toll", "Other", "Travel", and "Telephone". The "Other" option is highlighted in green and has a "Press enter to select" label to its right. The "Toll" option has a "Selected" label to its right.

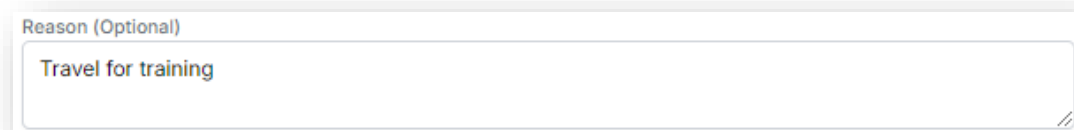
#### NOTE

For 'Toll', and 'Other' claims submission, additional supporting document is mandatory requirement for your claim.

**Step 3:** Fill out the required fields with pertinent details

A text input field labeled "Kilometers \*" with a red asterisk. The field contains the number "115".

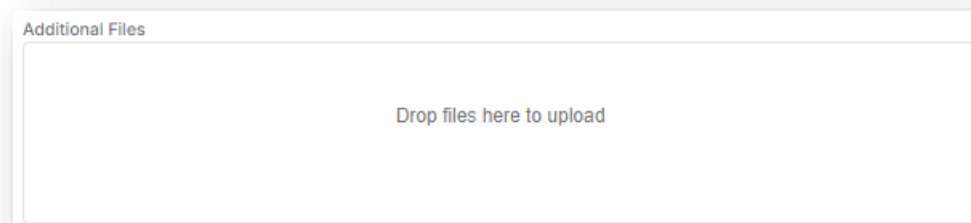
**Step 4:** Optionally you can provide the reason for the claim. Providing clear and concise information ensures smooth processing.



Reason (Optional)

Travel for training

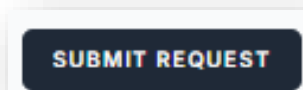
**Step 5:** Upload any supporting documents or receipts to substantiate your claim. This helps expedite the approval process and ensures transparency.



Additional Files

Drop files here to upload

**Step 6:** Finally, review your claim to ensure accuracy and completeness. Once you're satisfied, hit the 'Submit' button and your claim will be on its way for approval, and can be viewed under the pending section of the claims page.



SUBMIT REQUEST

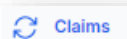
## 7.3 View Pending Claim

If not yet approved, your pending leave applications can still be viewed from the pending claims section.

**How to view a claim still pending approval :**

**Prerequisites:**

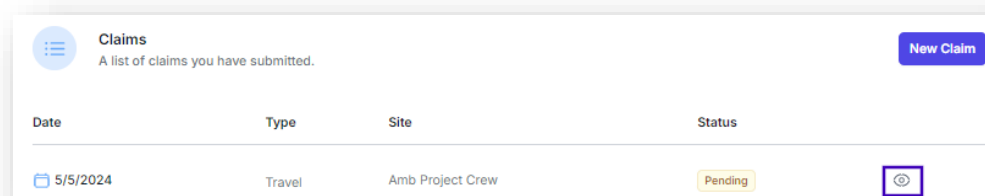
a. From the side menu, click on; **Claims**




b. Then, once navigated to the claims section, click on; **New Claim**

New Claim

**Step 1:** From the pending claims section, click on the '**view**' or, the eye icon next to the application you want to view.



Date	Type	Site	Status	
5/5/2024	Travel	Amb Project Crew	Pending	

**Result:** The selected claim can be viewed, including the claim type, dates, and any additional information available. From the claims **'view'**, an application can also be cancelled.

*The claims cancellation process is discussed in the next section of this chapter.*

**Claim Form - May 2024**

Please note that your claim has been submitted and is currently awaiting approval.

Status: Pending

Submitted On: 5/7/2024

Should you wish to cancel your claim, please click on the cancel claim button below.

**Cancel Claim**

I, Jane Doe with ID number [redacted] hereby affirm and consent that the information I have provided is accurate and precise.

Employee Signature  
Jane Doe

Date \*  
05/05/2024

Type \*  
Travel

Kilometers \*  
125

Reason (Optional)  
Site Training

## 7.4 Cancel a Pending Claim

When you are clicking on the **'view'** icon next to a claim application, not only can you view the request, you can also cancel the claim if it needs to be updated, or if it was submitted in error.

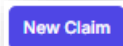
**In only three steps, you can cancel your pending claim application:**

### Prerequisites:

a. From the side menu, click on; **Claims**



b. Then, once navigated to the claims section, click on; **New Claim**



**Step 1:** From the pending claims section, click on the **'view'** icon to open the claim request.

Date	Type	Site	Status	
5/5/2024	Travel	Amb Project Crew	Pending	

**Step 2:** Next, click on; **'Cancel Claim'** to start the process

**Claim Form - May 2024**

Please note that your claim has been submitted and is currently awaiting approval.

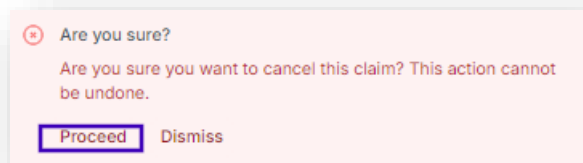
Status: Pending

Submitted On: 5/7/2024

Should you wish to cancel your claim, please click on the cancel claim button below.

**Cancel Claim**

**Step 3:** To complete the leave cancellation, click on **'Proceed'**.



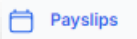
**Result:** You will be redirected to the **'Claims'** page, and the claim will no longer be pending approval.

That brings us to the end of employee claims submissions.



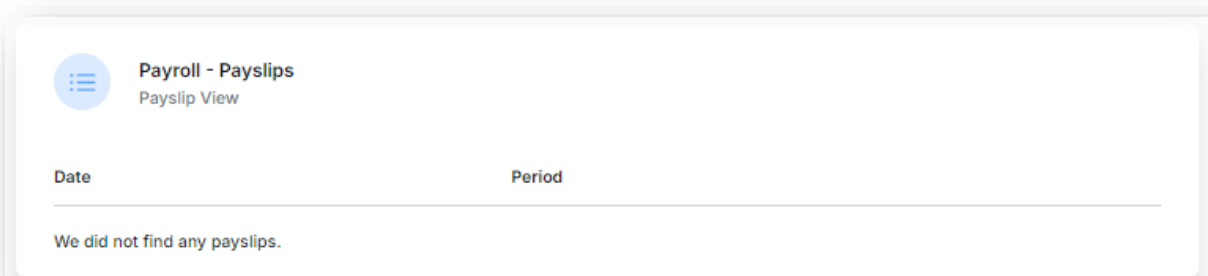
## 8 Payslips

Also available on the site menu, you can easily access your payslips simply by clicking on 'Payslips'.



Payslips will be listed by the date it was added to the system, and the period applicable to the payslip.


Once navigated to the payslips page, you will be able to view and download your payslips.





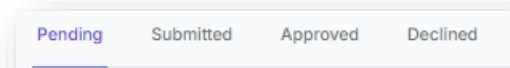
## 9 Overtime

This section will guide you through the processes to effortlessly manage your overtime in the employee portal.

The overtime section, is available from your employee menu and can be easily accessed by clicking on '**Overtime**'. 

### 9.1 The Overtime Page

Similar to the leave and claims sections, the overtime view presents all pending, submitted, approved and declined overtime submissions.

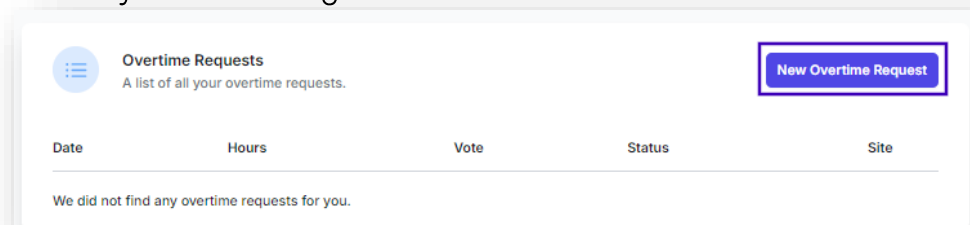


### 9.2 Submit a New Overtime Claim

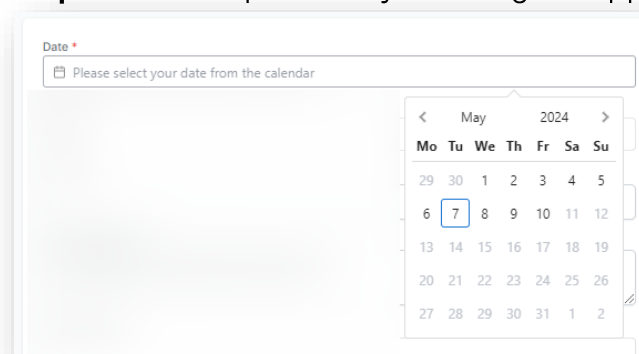
Overtime requests can be submitted from the employee portal. This process is repeated for each calendar day, however, you have the ability to add more than one time slot for each day.

**The following describes the steps to follow when a new overtime request is submitted:**

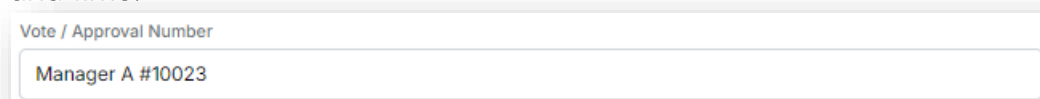
**Prerequisites:** To submit a new overtime request, click on the '**New Overtime**' request button. Once again, for ease of access, the 'New Overtime Request' button is always available on the top right corner on your claims page, regardless of the section you are viewing.



**Step 1:** Start the process by selecting the approved day for this overtime request.



**Step 2:** Provide the vote number approving the overtime request for the given date and time.

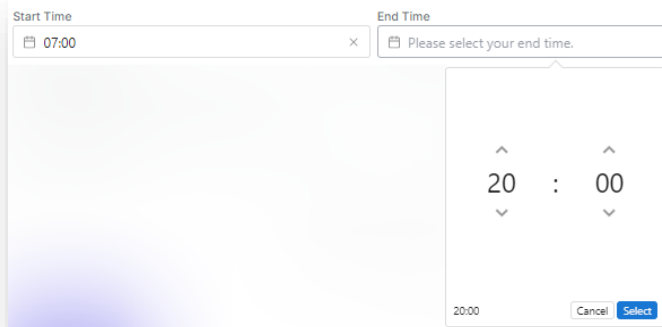


**⚠ NOTE**

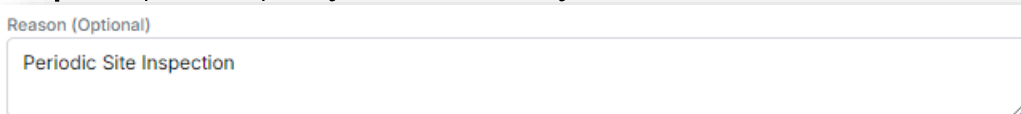
For step 2, the vote number is critical to your overtime submission, if not provided, your request may be declined.

**Step 3:** Select the time that your overtime has started.

**Step 4:** Next, provide the time that your overtime has ended for this time slot.



**Step 5:** Optional specify the reason for your overtime.



**Step 6:** If you do have any supporting documents, it can be uploaded.

Remember, clear communication ensures accurate tracking and approval.

**Step 7:** Review your overtime entries to ensure accuracy, before submitting them for approval.

**Step 8:** To submit your overtime request for approval, click on the 'Add Time Slot' button.

**ADD TIME SLOT**

**Result:** You've successfully managed your overtime. With our user-friendly Employee Portal, tracking your extra hours has never been easier.

**⚠ NOTE**

Remember, once an overtime request was sent for approval, it will be locked and can no longer be changed or deleted.

**\*In the case that you need to add additional time slots for the same day, stay on the current page, and repeat the process explained above. Proceed to submit for approval, once all the time slots were added.**

## 9.3 Viewing Your Overtime Requests

It might be good to review your overtime requests, prior to processing your period submission for the current payroll. After all, double-checking now, saves time later.

**How to view overtime, explained below:**

### Prerequisites:

- From the side menu, click on; **Overtime**
- Then, once navigated to the overtime section, redirect to the overtime submitted section.

**Step 1:** The same as with previous sections, click on the view icon, next to the submission you want to view.

Date	Hours	Vote	Status	Site
3/16/2024	13:00	Manager A #10023	Submitted	Amb Project Crew

**Result:** You will be able to view all time slots submitted for the day you are viewing.

**Overtime - April 2024**

Please enter your overtime information, multiple time slots can be added to this day if required.

**Time Slots**

Please review the time slots that you have added below, time slots will automatically be saved when you add them.

Time In	Time Out	Hours
07:00	20:00	13:00

Kindly note that this timesheet has been locked and can no longer be edited or deleted as it has been submitted for approval

### NOTE

Once overtime was submitted for approval, it will be locked and can no longer be changed or deleted.

In the case that you need to make changes, you need to ask your manager to decline the overtime submission.

That concludes your overtime submissions. Whether you're logging additional hours for a project deadline or ensuring fair compensation for your efforts, our software empowers you to take control of your overtime management.

Side Menu

## 10 Documents

We understand the importance of efficient management of employee documents within our organization. In this section, we will walk you through the process of accessing, uploading, and managing your documents effectively on the new system.

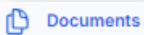
The documents section will have all documents associated to your employment with Capital PFS. This may include documents such as your employment contract, incident notifications, medical documents, and other important paperwork.

### 10.1 Document Management

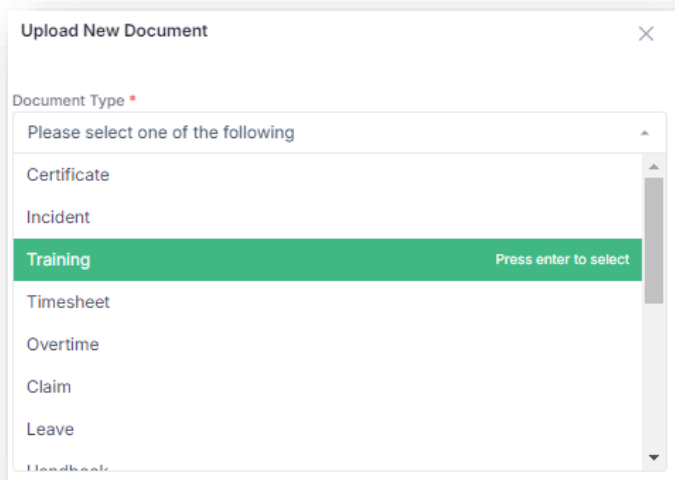
In this section, we will guide you on how to efficiently manage and upload your employee documents to ensure compliance and easy access to your records. This is a seamless process to keep your employee profile up-to-date and organized.

**The process of managing your employee documents:**

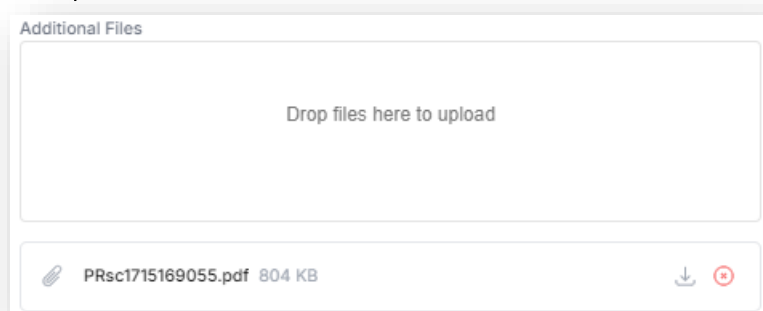
#### Prerequisites:

- From the side menu, click on; **Documents.** 
- Next, once navigated to the documents section, to add a new document, click on the '**New Document**' button.

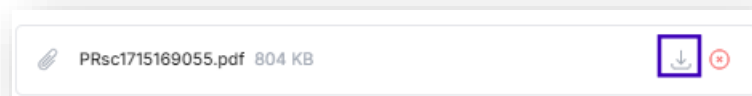
**Step 1:** Press enter to select the correct document type from the drop-down list.



**Step 2:** You can now add your document in the provided section. To add a document, you can either drag-and-drop a file, or search and select a file from your computer or device.



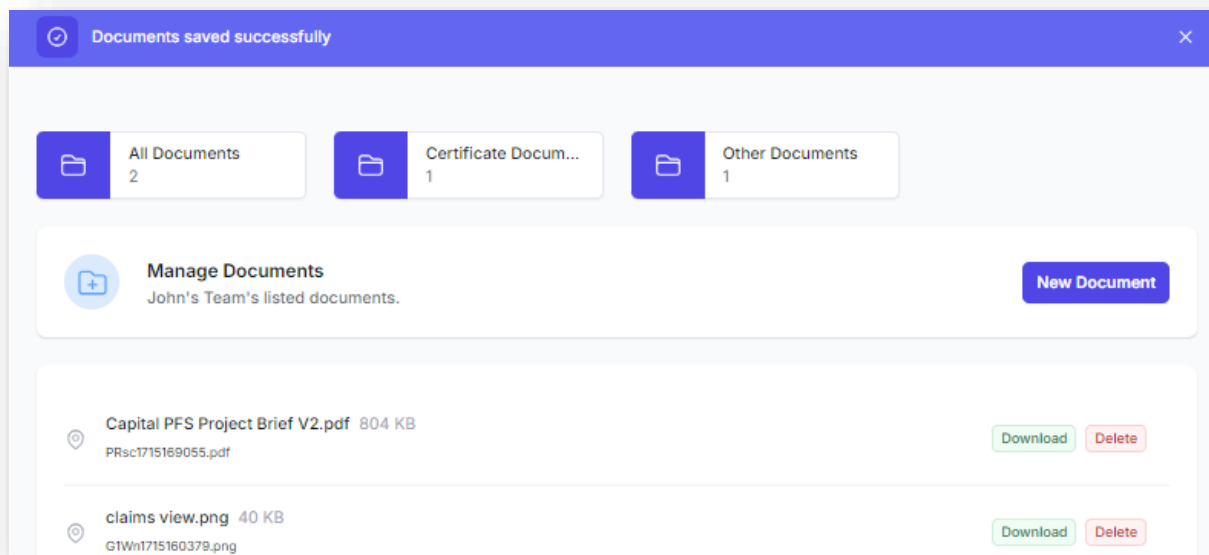
**Step 3:** By clicking on the 'Download' icon, you can review your uploaded document to ensure that it is the correct file. The document will be available to review from your downloads folder.



**Step 4:** If you are certain that the correct document was selected, click on the 'Save Document' button. If it is not the correct document, simply click on 'Cancel' to abort the action



**Result:** Your new document, will now be available from your documents section, linked to the correct folder if a document type was selected. From the documents section, you can download or delete certain files.



**NOTE**

Remember, supporting documents that was uploaded for any type of submissions, will also be listed in the documents section.

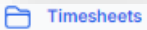
Side Menu

## 11 Timesheets

As one of the most important and repetitive employee tasks, you need to submit your overall timesheets, forming part of each payroll period.

Whether you're logging hours worked for a day, or submitting a bulk timesheet for a period, our software system makes managing your timesheets a breeze.

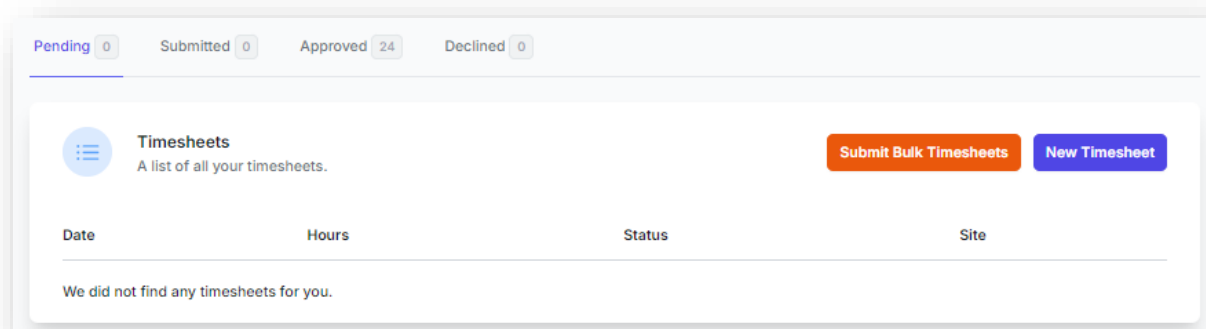
In this chapter, we will look at the available processes that can be followed in order to add timesheet submission to a payroll period.

First things first, select 'Timesheets' from the employee menu on the left to redirect to the timesheets page. 

### 11.1 The Timesheets Page

Once redirected to the timesheets section, pending, submitted, approved, and declined timesheets can be viewed.

From each one of the mentioned sections, you will be able to submit a new timesheet. Two options to do so, is permanently available on the top-right corner of the timesheets page.



### 11.2 Submitting Timesheets

This section will guide you through the needed steps to follow when selecting either Bulk Timesheets, or New Time Sheets. Lets us look at the processes for each submission option.


#### 11.2.a Submit Bulk Timesheets

It might be a tedious process to update your timesheet by selecting the day, and then adding the timeslot for each single day on a calendar month, in order to complete your submissions for a payroll period. We therefore took intuitive and added the option to submit your timesheets in bulk.

## Submitting bulk time sheets explained:

### Prerequisite:

- From the employee menu, click on; **Timesheets**.
- Next, click on the '**Submit Bulk Timesheets**' to start the process.

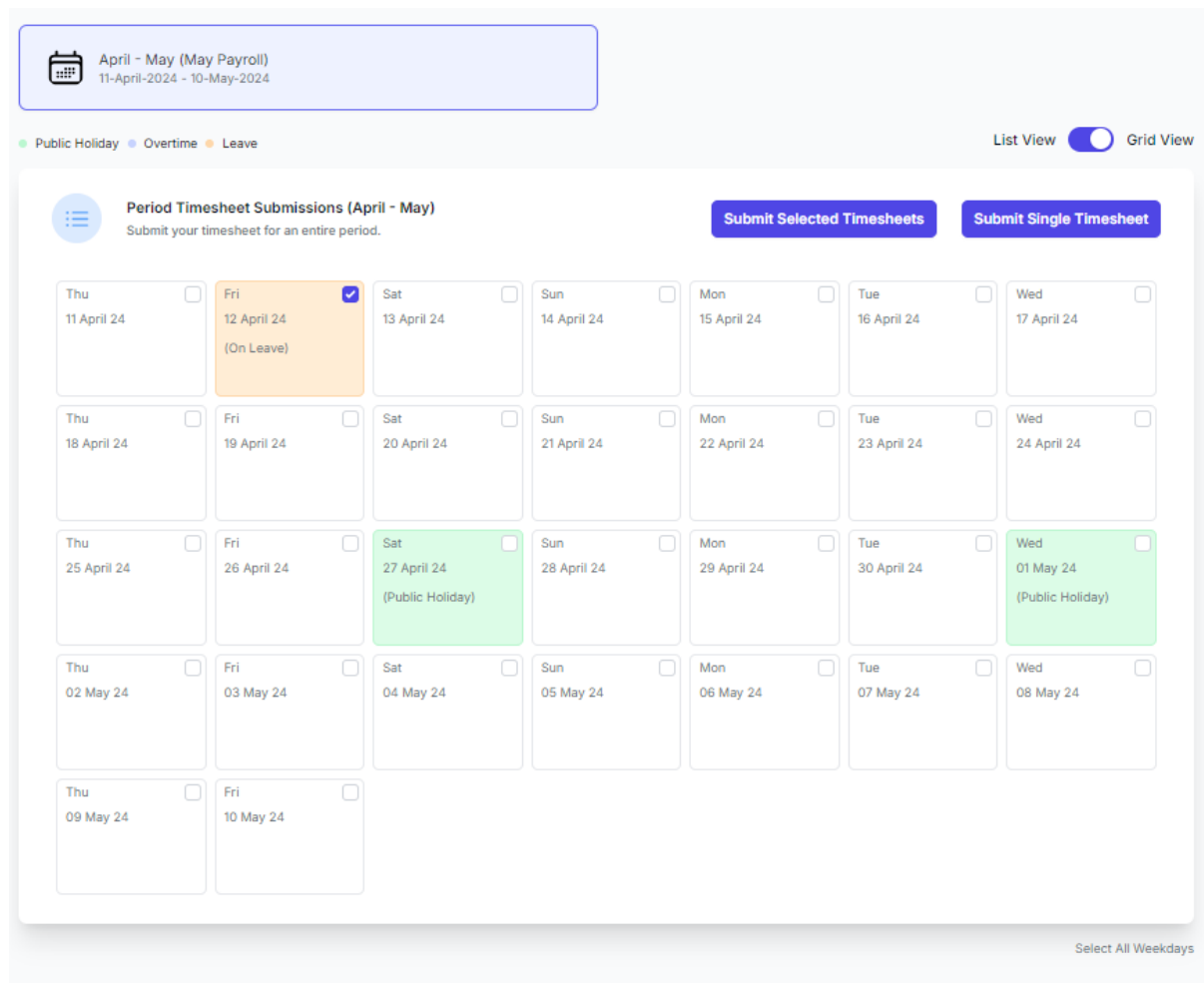
 Timesheets

**Submit Bulk Timesheets**

### Bulk timesheets submissions explained:

Once redirected to the bulk timesheet calendar page, the following information will be presented on the screen:

- Your current payroll period, at the top.
- The option to change the view from the default grid view, to a list view if preferred.
- The calendar in the middle section of the page will display only the accepted days for this payroll period.
- Additional information displayed on the calendar may include, public holidays, approved leave, as well as overtime and claims that may have been submitted for this payroll period. \
- The option to select all the weekdays for this period simultaneously, is available at the left bottom section, below the calendar.



April - May (May Payroll)  
11-April-2024 - 10-May-2024

Public Holiday Overtime Leave

List View ☒ Grid View

**Period Timesheet Submissions (April - May)**  
Submit your timesheet for an entire period.

**Submit Selected Timesheets** **Submit Single Timesheet**

Thu 11 April 24	Fri 12 April 24 (On Leave)	Sat 13 April 24	Sun 14 April 24	Mon 15 April 24	Tue 16 April 24	Wed 17 April 24
Thu 18 April 24	Fri 19 April 24	Sat 20 April 24	Sun 21 April 24	Mon 22 April 24	Tue 23 April 24	Wed 24 April 24
Thu 25 April 24	Fri 26 April 24	Sat 27 April 24 (Public Holiday)	Sun 28 April 24	Mon 29 April 24	Tue 30 April 24	Wed 01 May 24 (Public Holiday)
Thu 02 May 24	Fri 03 May 24	Sat 04 May 24	Sun 05 May 24	Mon 06 May 24	Tue 07 May 24	Wed 08 May 24
Thu 09 May 24	Fri 10 May 24					

Select All Weekdays

Employee steps to follow:

**Step 1:** By clicking in the block available for each day, the days to be included can be selected.

**Step 2:** Alternatively, you can click on the short cut provided at the bottom of the calendar.

Select All Weekdays

**Step 3:** Review and add or delete any dates, ensuring your timesheet is up to date.

**Step 4:** If you are satisfied with the selected days for the timesheet period, click on the '**Submit Selected Timesheets**' button to send the request to your manager for approval.

Submit Selected Timesheets

**Step 5:** To complete the action, confirm that the given information is accurate and true. Click on the '**Submit Period**' button. Your electronic signature will be linked to this submission.

**Result:** You have successfully managed your timesheet. Remember, once a timesheet was submitted and sent for approval, it can no longer be changed.



## 11.2.b Submit New Timesheet

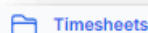
If you don't want to make use of the bulk timesheets submission, there is an option to submit a single timesheet for a day, or for each day.

This section will describe the steps to follow when a single timesheet is submitted.

### Submitting a single timesheet explained:

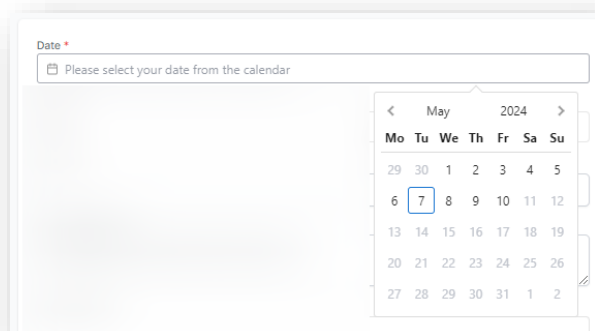
#### Prerequisite:

- From the employee menu, click on; **Timesheets**.
- Next, click on the '**New Timesheet**' to start the process.

A blue button with a folder icon and the text "Timesheets".A blue button with the text "New Timesheet".

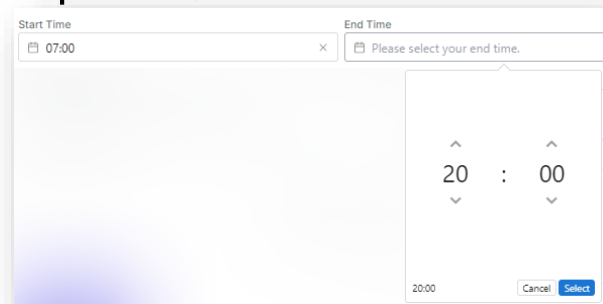
Employee steps explained:

**Step 1:** Start by selecting a day from the calendar.

A screenshot of a date selection interface. At the top, there is a text input field labeled "Date" with a calendar icon and the placeholder text "Please select your date from the calendar". Below this is a calendar for May 2024. The days of the week are listed as Mo, Tu, We, Th, Fr, Sa, Su. The date 7 is highlighted with a blue border. The calendar shows dates from 29 to 31 for the previous month and 1 to 2 for the next month.

**Step 2:** Select the time that your day of working started.

**Step 3:** Then, confirm the end time of this working day.

A screenshot of a time selection interface. It has two sections: "Start Time" and "End Time". The "Start Time" section shows "07:00" in a text input field. The "End Time" section has a text input field with the placeholder "Please select your end time." and a time picker below it. The time picker shows "20 : 00" with up and down arrows for each part. At the bottom of the time picker, there are "Cancel" and "Select" buttons.

**Step 4:** If you would like to provide an optional reason for this day of work, you can type it in the provided section.

**Step 5:** Any documents that you might want to add for the selected working day, can be added in the provided section.

**Step 6:** Click on the '**Add Time Slot**' if you are satisfied with the provided information.

**Step 7:** If you are satisfied with your time slot, proceed with submission by clicking on the '**Submit For Approval**' button. Alternatively, you can add an additional time slot for the selected day, and then submit for approval.

**Result:** Your single day timesheet and supporting time slots will be send for approval. Remember, once send for approval, the timesheet will be locked and can no longer be changed.

Although, your timesheets are submitted, your overall period submission may not be completed yet. If you do have any additional submissions such as claims, or overtime, the requests should be updated and included in your period submission to be included in your salary for the payroll period.

If you do not have any additional submissions for the period, you can submit your period submission for the next payroll period, from the 'periods' section discussed in the next chapter.

With our user-friendly Employee Portal, tracking your time has never been easier.

↶ Side Menu

## 12. Period Submissions

Manage your period submission effortlessly in the Employee Portal.

In this chapter, we will look at payroll periods, available from your employee menu. At the end of this section, we will also point out some important requirements to keep in mind. You also can view the important notes by clicking [here](#).

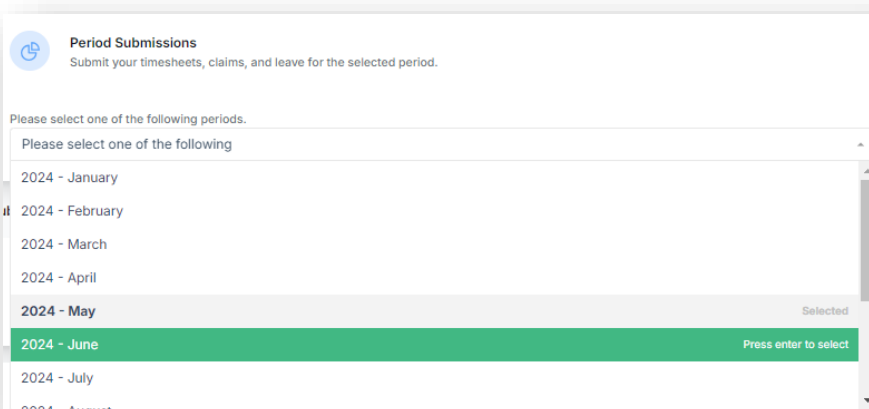
This is where you can track your submissions for the period, update a period, and communicate the information to your manager—all within a centralized platform.

### Prerequisite:

a. Select 'Periods' from the employee menu, you can then submit your timesheets, claims and overtime, for a selected payroll period.

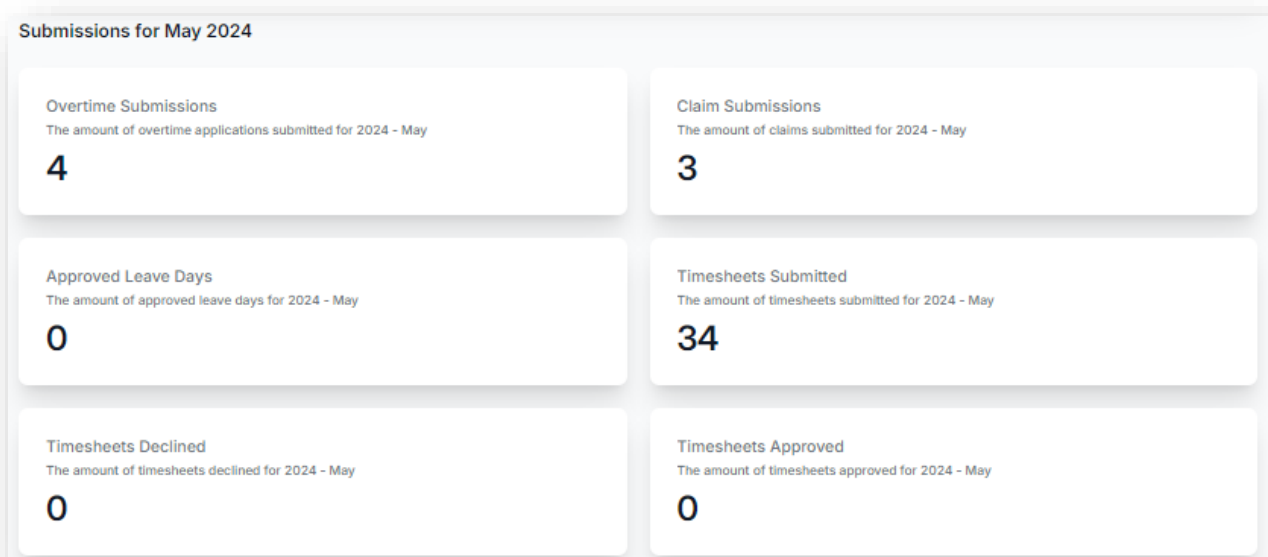
### Period submission explained:

**Step 1:** From the drop-down list, select one of the available months as the payroll periods.



The screenshot shows a web interface titled "Period Submissions" with a subtitle "Submit your timesheets, claims, and leave for the selected period." Below the title, there is a prompt "Please select one of the following periods." followed by a dropdown menu. The dropdown menu is open, displaying a list of months for the year 2024: January, February, March, April, May, June, and July. The "2024 - May" option is currently selected, indicated by a grey background and the word "Selected" to its right. The "2024 - June" option is highlighted with a green background and includes a "Press enter to select" button to its right. The "2024 - July" option is also visible below June. The interface is clean and modern, with a light grey background and clear typography.

**Step 2:** Next, view your submissions made for the selected month



**Step 3:** Finally, if you are certain that ALL your applications, requests and submission, and supporting documents are accurate and up to date for the current payroll period, click on the 'Submit' button located on the right.



Submit 2024 - June Period

**⚠️ If the 'Submit Period' button was not clicked, your period submission WILL NOT BE PROCESSED FOR APPROVAL. It will be treated as though there are still outstanding, timesheets, claims or overtime, not yet captured for the current payroll period.**

**Step 3.1** Note: the employee portal is equipped with warning messages. These messages serve as reminders to ensure that you have not missed any submission for a payroll period.

**Warning - Incomplete Period**

1. You have not submitted any overtime for this period.
2. You have not submitted any claims for this period.
3. You have not submitted any timesheets for this period.

**Submit Period** Cancel Submission

**Result:** Your period submission will be notified to all relevant approval personal and also your manager.



## Period Submissions — Important Notes

- **Dependant on your employment term, the day after the last day of the payroll period, is the day that your period submissions must be submitted for approval.**  
*For Example: If your payroll period begins on the 11<sup>th</sup> of each month, and end on the 10<sup>th</sup>, the period for this payroll should be submitted no later than the 11<sup>th</sup> of the same month, or one day after the last day in this period.*
- **We do acknowledge possible unforeseen circumstances, and therefore the system allows an additional couple of days to submit your payroll period for approval.**
- **In addition to the extra days provided to submit a period, the system will also send you emails reminding you of an outstanding period submission.**

▪



Submit 2024 - June Period

If the 'Submit Period' button was not clicked, your period submission **WILL NOT BE PROCESSED**. It will be treated as though there are still outstanding, timesheets, claims or overtime, not yet captured for the current payroll period.

- If the 'Submit' button was selected, the payroll period can no longer be changed, this action serves as the employee's confirmation and acknowledgement that ALL necessary submission was updated, correct and the payroll period may be finalized and processed for payment. If you period was submitted for approval, the big blue button will no longer display on you 'Periods' page for the month selected.
- Remember, your claims, overtime and timesheets are an essential part of the payroll period. Therefore, once a period submission was submitted and is pending approval, none of the mentioned can be changed or deleted any more.
- In the case that you might have missed, a claim or overtime, or need to correct an error, you will need to ask your manager to decline the submission type. For period submission, only once a submission was declined, can it be updated or deleted.
- Past payroll periods can't be changed or submitted.

Considering the above notes, it is imperative that all your information for each payroll period, is up to date, accurate, true and most importantly the overall period is submitted for approval, not just one, or two sections but rather ALL the necessary submissions to be considered for the payroll period.

↶ Side Menu

## 13 Employee Performance

Also available from the left menu, you can select and view your performance for a certain date period.

In this chapter, you will gain a better understanding of how to utilize the platform to enhance your performance management strategies in compliance with company policies.

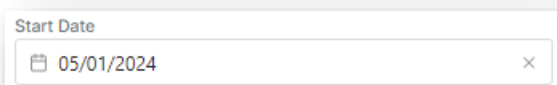
### Employee actions that can be taken:

#### Prerequisite:

- a. Select Performance from the left menu. 

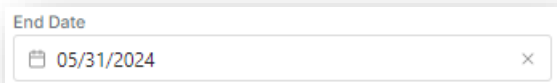
Once navigated to the performance page, your performance criteria that can be seen on this page will include all submissions for the selected period, such as overtime applications, leave type applications, and general applications. The general applications represent your timesheet submissions. The performance section allows you to keep track of your timesheets and overtime, all visible in one place.

**Step 1:** Select the start date from when you want to view your performance.



Start Date  
05/01/2024

**Step 2:** Provide the end date of the performance that you want to view.



End Date  
05/31/2024


**Step 3:** Click on the **'Filter Timesheet'** to get the performance information for the specified time period.

**Filter Timesheets**

**Step 4:** You can download the information by clicking on the **'Download'** button.

**Download**

**Result:** The system will generate the file, and it will be sent to you by email once it is available.

 Timesheet report is being generated and will be sent to you shortly.

## 14 Account Settings

In this chapter, we will explore the account settings features available to you from the left menu. This is where you can personalize and manage your contacts and bank details.

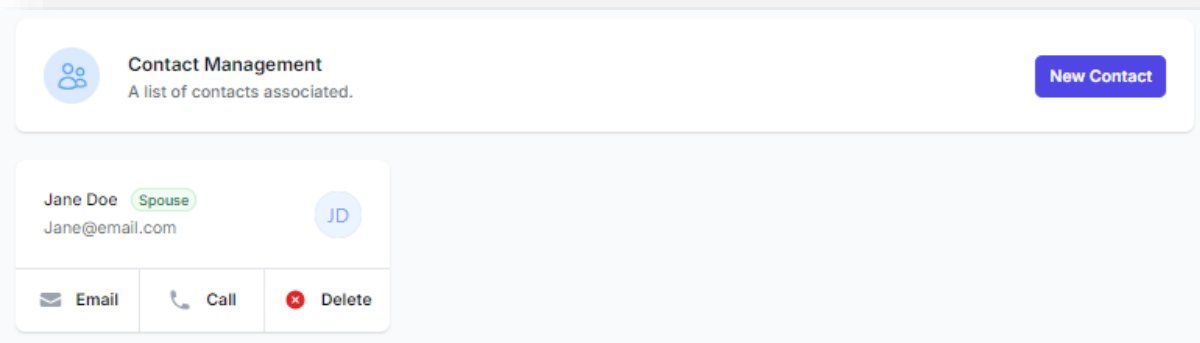
### 14.1 Employee Contacts

#### Prerequisite:

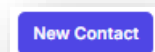
a. Select '**Contact**' available from the left menu.



Once navigated to the contacts page, all contacts listed to your employee profiled can be viewed.

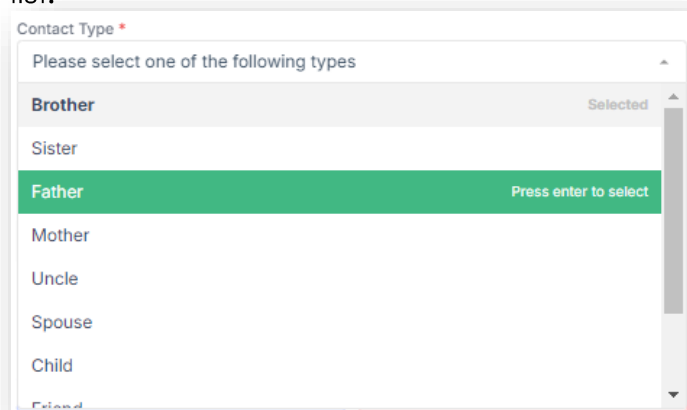


b. From the contact management page, click on the '**New Contact**' button.



#### Employee actions to add a new contact:

**Step 1:** To start adding your new contact, select the contact type from the dropdown list.



**Step 2:** Next, provide the first and last name of your new contact. Note that only the first name is mandatory.

First Name *	Last Name
Sam	Doe

**Step 3:** Provide the following contact details of the new person that you are adding;

1. Type the email address that can be used to send email notifications to the new contact person. The email is mandatory.
2. Type the contact phone number on which the person can be reached.

Email Address *	Contact Number
<input type="text" value="sam_doe@email.com"/>	<input type="text" value="9876543210"/>

**Step 4:** Confirm the gender of the new contact by selecting one of the options from the list.

Gender \*


**Step 5:** Optionally, if your contact might be called a different name, other than their first name. The preferred name can be updated.

Known As

**Step 6:** Review the provided information to ensure that it is accurate and correct.

**Step 7:** If all the information is correct, click on the **'Save Contact'** button to complete the process.

**Result:** Once the process was successfully completed, the new contact will be included on your contact management page.

**Contact Management**  
A list of contacts associated.

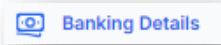
<div>Sam Doe <span>Brother</span></div> <div>Sam_doe@email.com</div> <div>SD</div>	<div>Jane Doe <span>Spouse</span></div> <div>Jane@email.com</div> <div>JD</div>
<div>Email</div> <div>Call</div> <div>Delete</div>	<div>Email</div> <div>Call</div> <div>Delete</div>

\*Note, your contact can only be viewed and deleted. Contacts cannot be edited. Be sure that the information is correct before adding your contact,

## 14.2 Employee Bank Details

### Prerequisite:

- a. Select '**Banking Details**' available from the left menu.



Once navigated to the banking details page, banking details listed here, will be the details provided to the agency at the time of recruitment.

If for any reason, your banking details needs to be changed, the employee portal provides you with the ability to update it yourself.

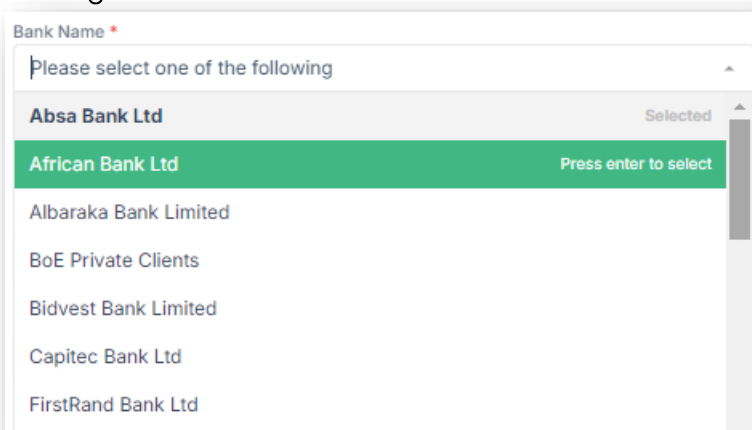
### Steps to add a new bank account:

#### Prerequisite:

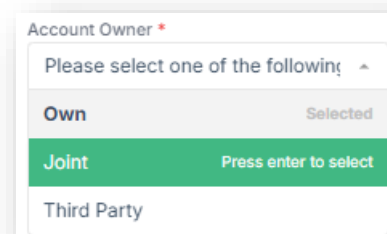
From the banking details page, click on the '**Add Bank Account**' button to start the process.



**Step 1:** From the bank name section, search and select your bank by scrolling through the listed bank names.

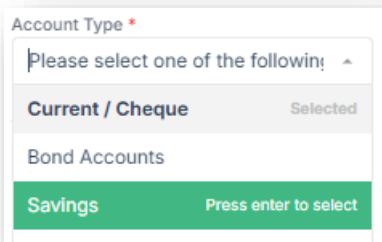
A dropdown menu titled "Bank Name \*". The search bar contains the text "Please select one of the following". The list of banks includes: Absa Bank Ltd (Selected), African Bank Ltd (Press enter to select), Albaraka Bank Limited, BoE Private Clients, Bidvest Bank Limited, Capitec Bank Ltd, and FirstRand Bank Ltd.

**Step 2:** Confirm if the bank account that you are adding is your own account, a joint account, or a third party bank account, by selecting the appropriate option from the list.

A dropdown menu titled "Account Owner \*". The search bar contains the text "Please select one of the following". The list of options includes: Own (Selected), Joint (Press enter to select), and Third Party.



**Step 3:** Confirm the account type of the new bank account that you are adding.



Account Type \*

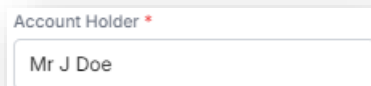
Please select one of the following! ^

Current / Cheque Selected

Bond Accounts

Savings Press enter to select

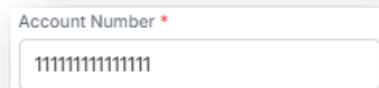
**Step 4:** Confirm the account holder details as stated on the account confirmation letter.



Account Holder \*

Mr J Doe

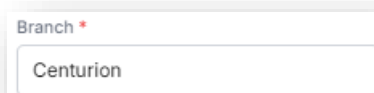
**Step 5:** Type in the account number used for this bank account.



Account Number \*

11111111111111

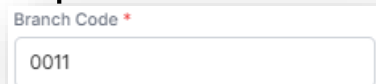
**Step 6:** Type in the branch name.



Branch \*

Centurion

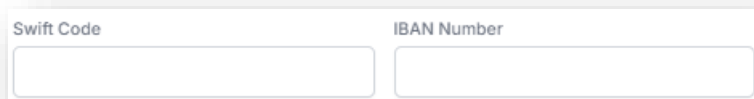
**Step 7:** Provide the branch code used for the bank account.



Branch Code \*

0011

**Step 8:** In the case of international banking, provide the addition supporting information.



Swift Code IBAN Number

**Step 9:** For referencing purposes, you may add a beneficiary reference and account comment .

Beneficiary Reference	Account Comment
<input type="text"/>	<input type="text"/>

**Step 10:** Provide an account confirmation letter. This compulsory in order to add and save the bank account information. If the letter is not provided, the banking details will not be accepted, and the account details will not be updated.

**Step 11:** Review the provided information to ensure accuracy.

**Step 12:** Finally, you can add the new bank account by clicking on the '**Save Account Information**' button.

Save Account Information

**Result:** Our system will automatically update your information if the new account details was added successfully. The new account will now replace the previous account as the listed account in your banking details section.

**NOTE**

Kindly note, to ensure seamless integration across all platforms, inform Capital PFS of any changes in a timely manner.

## 15. Conclusion

In conclusion, the implementation of the new software system marks a significant milestone in our journey towards enhancing productivity and efficiency within our organization. Through this employee user manual, we have provided comprehensive guidance on navigating and utilizing the software's features effectively, empowering our employees to leverage its full potential.

By streamlining processes, automating repetitive tasks, and centralizing data management, the software system is poised to revolutionize our operations. It offers a wide array of tools and functionalities tailored to meet the diverse needs of our teams, from overtime submission and claim requests to timesheet management and performance reporting.

Moreover, by freeing up valuable time formerly spent on manual tasks, employees can redirect their focus towards more strategic initiatives and value-added activities. This not only enhances individual productivity but also contributes to the overall growth and success of our organization.

As we embark on this new chapter, it is essential for all employees to embrace a learning mindset and actively engage with the software system. Additional training materials, support, and feedback will be crucial in ensuring a smooth transition and maximizing the benefits offered by the new technology.

Ultimately, by harnessing the power of this innovative software system, we are poised to achieve greater agility, responsiveness, and competitiveness in the dynamic landscape of recruitment. Together, let us embrace this opportunity to drive excellence and deliver exceptional results for our company, employers, and mostly as an individual.

