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Open Maintenance | Employees

Click the New icon to load the form. To edit existing employees, [search for the item](#) and open to make amendments.

Enter a unique Employee Code and Display Name, which is displayed in the application (top-right) when the user is logged in. Enter the First and Last Name and choose the Employee Category. Select the Office, Service and Sub Service Lines, as well as the Employee's Line Manager.

Enter the Date Started (of employment) - this will default to 'Today'. When employment ceases, the Date Left field must be completed indicating when the employee left the company.

For Reference purposes enter the Salary Code, GL Prefix, and Daily Standard Hours (which the employee is required to work), and the Annual Leave Days given.

As a Take on, enter the Annual Leave/Sick Balance for the Employee. Note that this amount represents the leave opening balance for the employee - this is not the running balance.

Enter the Employee Contact Details. **Note:** It is mandatory to provide an email address as emails are sent to Approvers and Employees for [timesheets and timesheet rejections](#)

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Employee Rates

The Rates entry screen allows the user to select the Rates that will apply to each Employee. Each Employee must be setup with a [Standard Rate](#) to complete timesheets. The Charge Rate must be an hourly rate.

Rates must be setup in advance of the effective date. As the rate information is stored at the time of capture, it is important to load these into the system before people commence capturing time beyond the proposed effective dates for the new rates.

Open Maintenance | Employee | Rates tab

Enter the **Cost Rate** for the employee. Cost Rates are necessary to value non-chargeable time.

Existing rates are displayed. To add new rate, use the blank row to insert the details. Each field is a lookup allowing you to search on enabled entities for the employee:

- Select the Office the Rate will be used for
- Select the Rate Code to be used for the Employee
- Enter the date the Rate became Effective
- Enter the Rate Per Hour

Click the Save button next to the row to retain the change.

IMPORTANT NOTE

When employee charge rates are changed, the following is taken into account:

- Charge rate should be changed before the financial period end is changed.
- Charge rate should be changed before employees have processed time for the days on and after the effective date of the new rate.
- The Cost rate should be updated before employees have processed time on the new rate.

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Time and Disbursements Dashboard

Open Timesheet/Disbursements | Time and Expenses

A grid view lists all Open Timesheets and Disbursements. You can filter on the view by choosing only Timesheets or Disbursements and view by Status:

- Approved
- Confirmed
- Open
- Rejected (use the checkbox to show/hide Rejections in the main view)
- Submitted
- Updated to eCost
- Updating

The *time toolbar* allows you to create a new timesheet and disbursement and print a list of the user's timesheets.

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Setting up Timesheet Defaults

Open Maintenance | System Options

The following table will assist in setting up the necessary validation rules:

Global Periods	
Timesheet Frequency	Select the Frequency of Timesheet Submission: Weekly: A timesheet is completed on a weekly basis. Bi-Monthly: A timesheet is completed twice a month.
Bi-Month Date	If there are two Timesheet periods per month, this will be the number of days for the first Timesheet period.
Week Day	Specify the day on which week ends e.g. Sunday 1, Monday 2, Tuesday 3, Wednesday 4, Thursday 5, Friday 6, Saturday 7.
Timesheet Cut-Off On Month End	For Weekly Timesheets, indicate if last timesheet of the month must cut off on month end date e.g. Some timesheets may have less than 7 days.

Global Other	
Default Timesheet Rate	Select the System Wide Default Timesheet Rate that will be used for the firm.
Units per Hour	Enter the Number of Time Units in one Hour e.g. if time is measured in 6min units, the value will be 10.
Travelling Code	Select the default Disbursement code to be used for Travelling Expenses.
Non-chg Disb Allocation	Select the default Allocation code for non-Chargeable Disbursements.

Global | Options