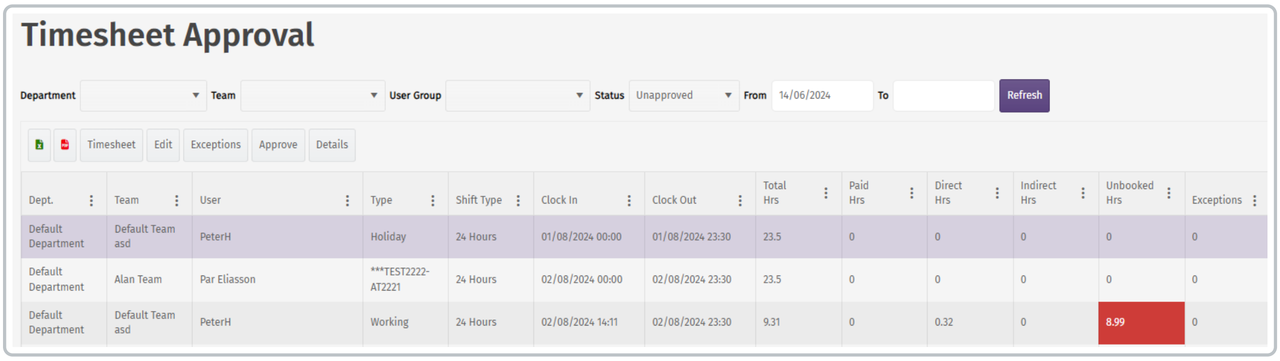
Timesheet Approval

20/08/2024 11:28 am BST

After a user has clocked out, their attendance log will initially have the status *Unprocessed*. Pay Rules will then be processed and the record will either be marked as automatically approved or unapproved (requiring manual approval). The rules will be processed and any exceptions will be raised. For more information, see Pay Rules.

Timesheet Approval screen

The **Timesheet Approval** page lets you access and manage a user's timesheet.



Status: Unapproved

From: 14/06/2024

Dept.	Team	User	Type	Shift Type	Clock In	Clock Out	Total Hrs	Paid Hrs	Direct Hrs	Indirect Hrs	Unbooked Hrs	Exceptions
Default Department	Default Team asd	PeterH	Holiday	24 Hours	01/08/2024 00:00	01/08/2024 23:30	23.5	0	0	0	0	0
Default Department	Alan Team	Par Eliasson	***TEST2222-AT2221	24 Hours	02/08/2024 00:00	02/08/2024 23:30	23.5	0	0	0	0	0
Default Department	Default Team asd	PeterH	Working	24 Hours	02/08/2024 14:11	02/08/2024 23:30	9.31	0	0.32	0	8.99	0

The image above is an example of a **Timesheet Approval** page listing all *Unapproved* timesheets for the dates specified.

You can search using any combination of the following criteria:

Department: Timesheets for users belonging to a selected department.

Team: Timesheets for users belonging to a selected team.

User Group: Timesheets for users belonging to a selected user group.

Status: The approval process goes through several stages. It is initially set to *Unprocessed* before being processed by an event which applies the pay and attendance rules that you've created (explore Pay Rules). The record will then be set to *Auto-approved* (not visible in the **Status** field when editing manually) or *Unapproved*.

When you make an edit, you may want to reapply the pay and attendance rules. To do this, you will set the status to *Unprocessed* so that the record can be reprocessed.

The statuses are:

- Auto Approved: Records that have been automatically approved based on your pay and attendance approval rules. This status is not visible when editing manually.
- Unprocessed: Records that have not been processed for pay and attendance approval rules.
- Ignored: Ignored records.
- Unapproved: Records that require manual approval.
- User Approved: A user manually approved the record.

From and to dates: The date range that the timesheets fall into.

User information is listed on the page based on your search criteria. Any*Unbooked Hrs* and the number of *Exceptions* on the timesheet are shown (highlighted in red in the image above.

When you select a user, the following menu items appear above the list:

- **Timesheet**: Displays the user's timesheet. For more information, see Timesheet documentation.
- **Edit**: Allows you to edit the user's attendance log. For more information, see Edit Attendance Log.
- **Exceptions**: Displays the exceptions on the selected timesheet. It shows the pay and attendance rules that were violated. The record will not be automatically approved. For example, if you left early, or did not clock out. Exceptions can be created manually.
- **Approve**: Users with the appropriate permissions can approve a timesheet.
- **Details**: Displays the activity logs for the attendance.

Attendance Exceptions

An exception is created for any attendance rule that was violated. The rules are defined in the attendance exception type which are typically added to an attendance log automatically by background processing. It is however possible to add exceptions manually if required. Adding it manually is usually never required.

System Exception Type

There are five system exception types which can be identified by their negative IDs in the **Attendance Exception Types** page. The system exception types are:

- Error: An error processing pay rules.
- Late: A late clock in based on the **Late Mins** defined in Shift Type.
- Missing Break: You didn't book time to a break that was specified to your work pattern.
- Unpaid Hours Exceeded: Exceeded unpaid hours worked based on the **Max Approved Unpaid Hrs** setting in Shift Type.
- Early Clock Out: Clocked out early.

It is possible to add additional exception types to reflect your own custom rules but you need to contact MESTEC support to do this.

Add Attendance Exception Type

Contact MESTEC support to assist you with setting up attendance exception types.

All fields are mandatory.

- Navigate to the **Attendance Exception Type** page and click **Add**.
- In the **Add Attendance Exception Type** popup, enter a name and description.
- Select the SQL statement that checks if a condition was breached.

Add Exceptions manually

- Navigate to the **Timesheet Approval** screen, select a record and click the **Exceptions** button.
- Click the **Add** button on the **Exceptions** screen to display the **Add Exception** popup.
- Select the type of exception in the **Type** field and leave a comment. Both of these are mandatory.

Attendance Exceptions report

The Attendance Exceptions report displays the details of exceptions for the selection criteria selected.

- Navigate to the **Attendance Exceptions** page.
- Select user groups, departments, users, dates and the types of exceptions you want to be reported on.
- Click the **View Report** button to generate the report.