capital PFS

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's 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 the system.

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 provide you with a quick guide on the basic repetitive actions that will be required from you as the employee.

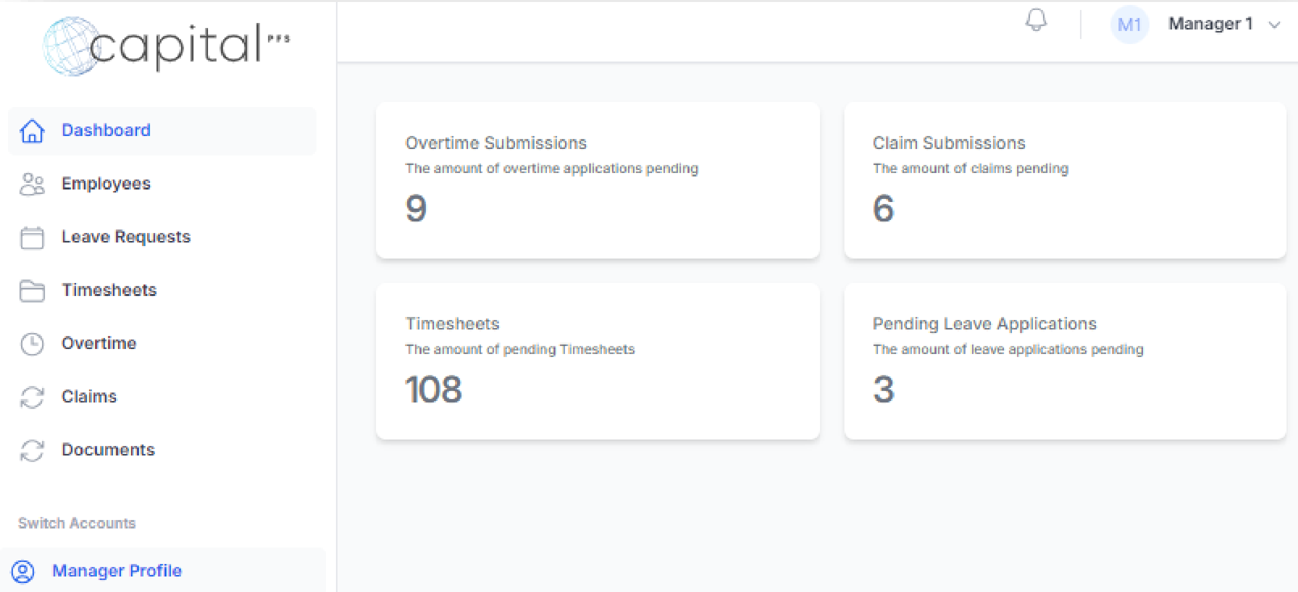
- **Claim Submissions**
- **Overtime Submissions**
- **Timesheets Submissions**
- **Period Submissions**

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

2. Manager Dashboard View

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

Responsive Image

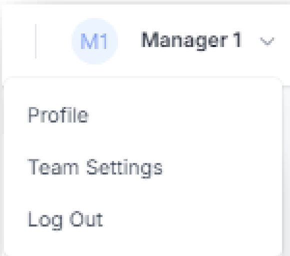


2.2 Top Section

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

2.2.1 User Profile

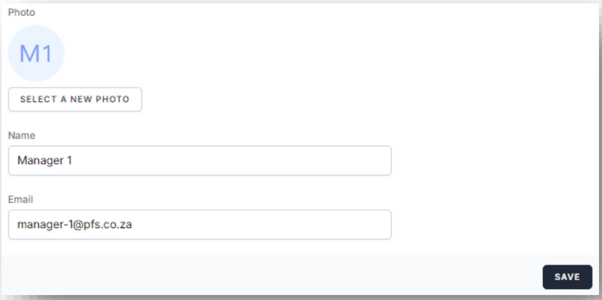
From your profile available on the top-right corner, once the arrow next to your name was selected, certain actions can be taken.



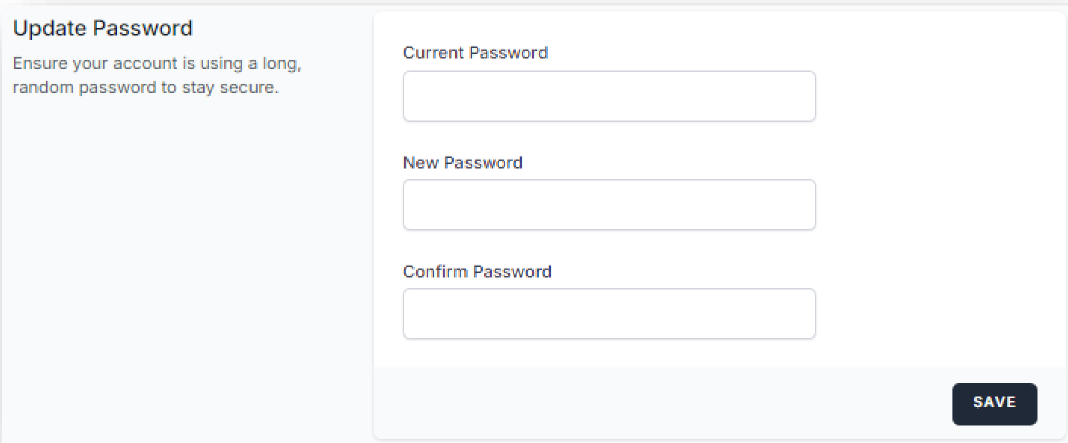
2.2.1.a Profile Actions

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

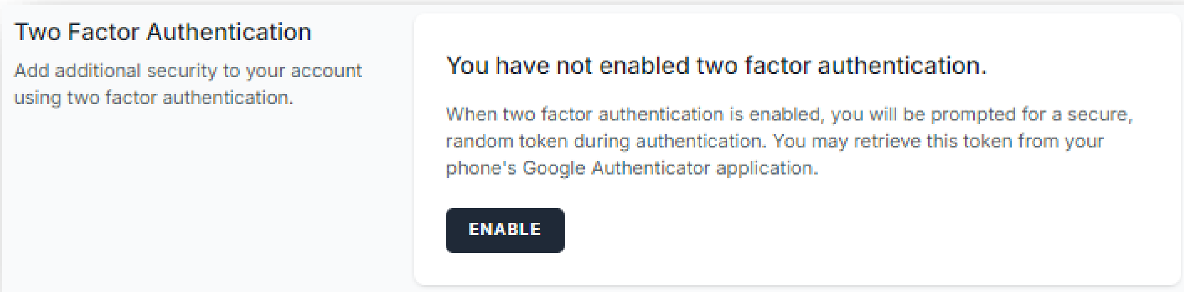
Profile Information; Allows you to change your user profile picture, name and email, updating your profile information.



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.

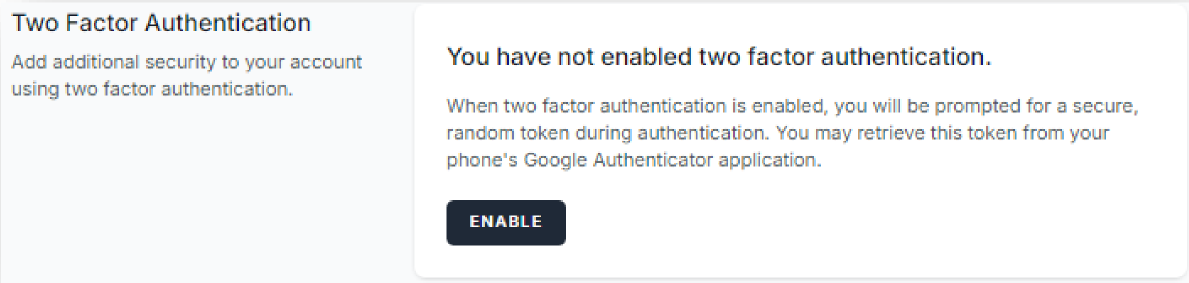


Two Factor Authentication; By enabling the two-factor authentication, you can add additional security to your account. You will be prompted for a secure random token that can be retrieved from your phone's Google Authentication application in order to enable this feature.



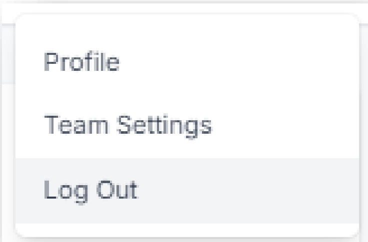
Browser Session; Your recent browser sessions will be listed in this section. You can manage and log out of your active sessions on other browsers or devices if necessary.

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



2.2.1.b 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.



2.2.2 Notifications

Also available from the top section of the system when the bell icon is selected, system notifications will be listed.

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.

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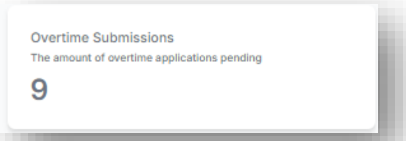
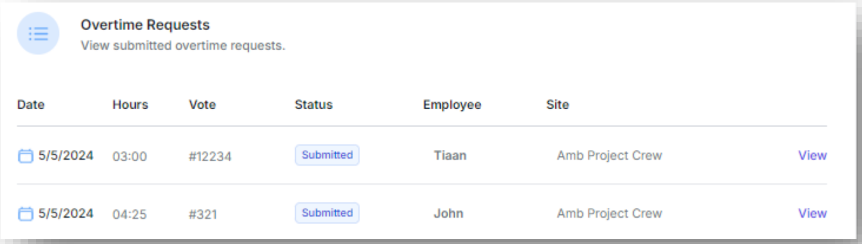
2.3 Employee Submissions and Applications

Employee submissions and Applications can be viewed from the middle section of your dashboard. The following employee sections can be easily accessed from the home page.

2.3.a. Overtime Submissions, will show the number of all employee overtime applications pending. If selected from the home page, you will be redirected to the 'Overtime Requests' section.

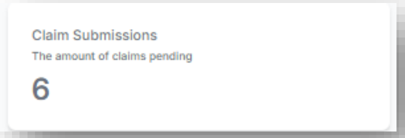


This navigation, will provide a list of **all** the employee overtime submissions for the current payroll period. To approve one overtime submission of an employee, click on the 'View' button to redirect to the selected overtime.

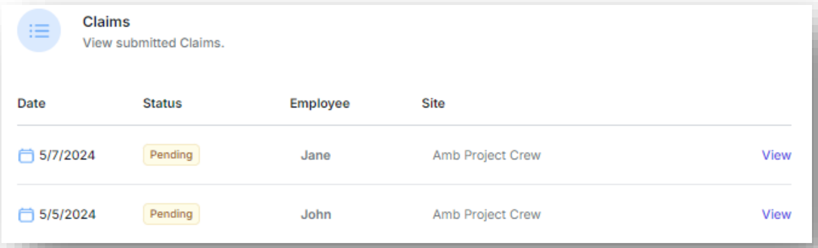


In the next chapter, 'Employees', we will look at the process to view, approve or decline bulk overtime submissions for the same employee. To save you time, this is the recommended action. You can review the process by clicking here.

2.3.b. Claim Submissions, will show the number of all employee claims submitted. If selected from the dashboard, you will be redirected to the 'Claims' section.

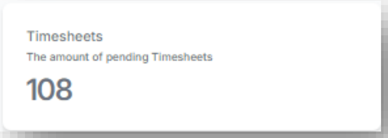


This navigation, will provide a list of **all** the employee claims submitted for the current payroll period. To approve one overtime submission of an employee, click on the 'View' button to redirect to the selected overtime.

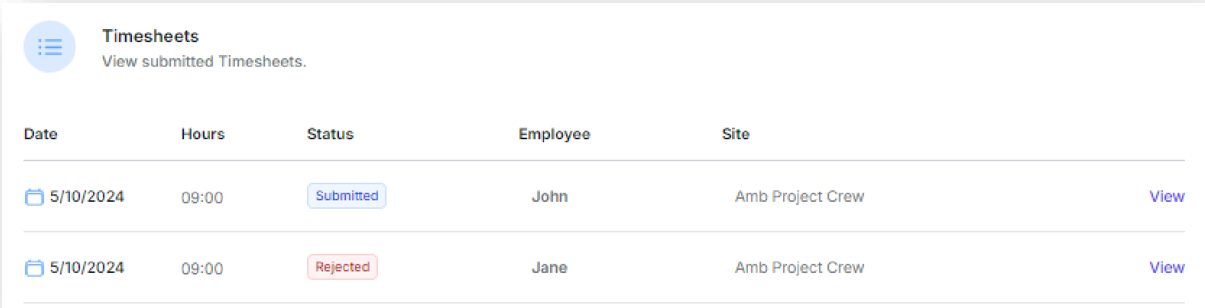


In the next chapter, 'Employees', we will look at the process to view, approve or decline bulk overtime submissions for the same employee. To save you time, this is the recommended action. You can review the process by clicking here.

2.3.c. Timesheets, shows the number of timesheets that was submitted by employees. If selected from the home page, you will be redirected to the 'Timesheets' section.

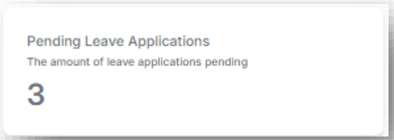


This navigation, will provide a list of **all** the employee timesheets submitted for the current payroll period. To approve one overtime submission of an employee, click on the 'View' button to redirect to the selected timesheet.

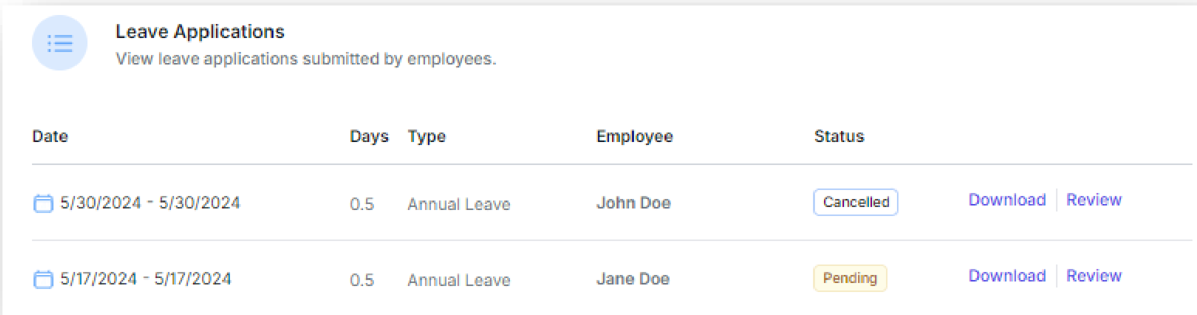


In the next chapter, 'Employees', we will look at the process to view, approve or decline bulk overtime submissions for the same employee. To save you time, this is the recommended action. You can review the process by clicking here.

2.3.d Pending Leave Applications, shows the number of leave applications pending approval. If selected from the home page, you will be redirected to the 'Leave Request' section.



This navigation, will provide a list of **all** the employee leave application submitted. To approve one leave application of an employee, click on the 'Review' button to redirect to the selected timesheet.



In the next chapter, 'Employees', we will look at the process to view, approve or decline leave applications for the same employee. To save you time, this is the recommended action. You can review the process by clicking here.

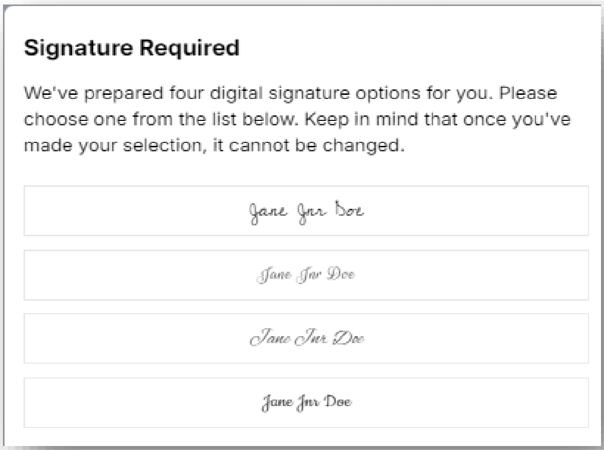
3. Digital Signature

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

Digital Signature Setup

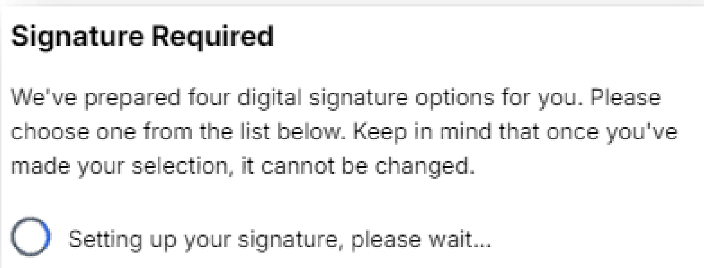
For certain system actions related to your profile, a digital signature is required in order to proceed. The signature setup will be requested from the system upon the users first action taken on the system.

The steps follow:
Step 1: The system will provide a notification requesting you to select your digital signature.



Step 2: Click on your preferred signature that will be used for all your approvals and actions.

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



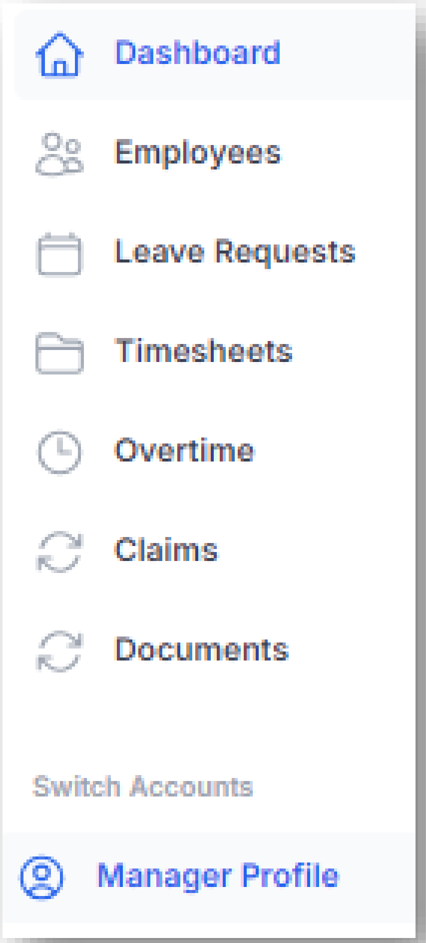
4. System Menu

The side menu, available on the left of your screen, presents the navigation to all the approval tasks and sections that should be accessed by you in order to accept or decline a submission.

From the manager or approver menu, all actions are displayed prominently for quick access. The menu can be accessed from any page of the system.

The menu sections are discussed in the following chapters. Alternatively, you can jump to a specific section by clicking on it from the responsive menu below,

Click on the image



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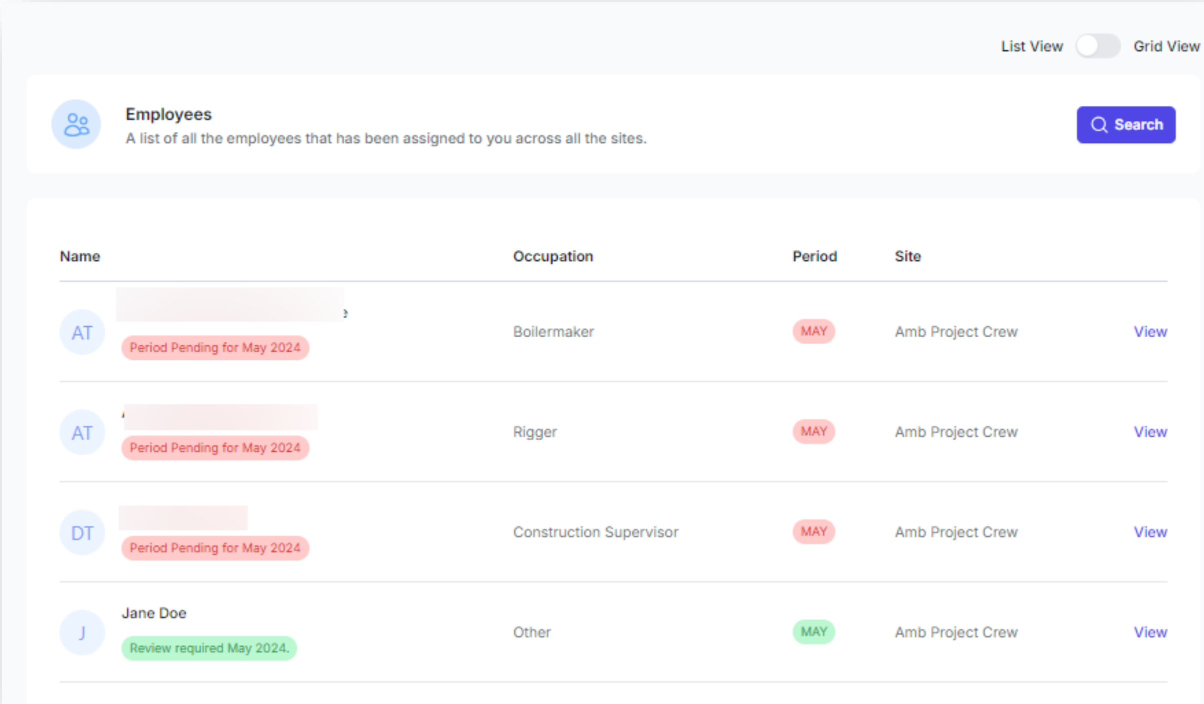
5 Employee Page

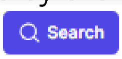
The first section on your side menu provides you with access to view all employees assigned to you. For each employee assigned to you, you will need to review and approve or decline their submissions for each new payroll period.

The following information can be viewed from the employee's page:



- A list of all employees that has been assigned to you across all sites that you are assigned to.
- For each listed employee, their occupation, the current payroll period and the site they are assigned will be displayed.
- Period Pending, will be displayed if the employee did not yet submit their submissions for the payroll period. This notice is highlighted in red.
- Review Required, will be displayed if all the employee submissions were updated and the period submitted for approval. This notice is highlighted in green.
- By default, the employees are shown in a list view. The view can be changed from the top right corner when 'Grid View' is selected. 

  The grid view:

- You can also search for an employee by clicking on the search button, available on the top right corner of the page. 

The following describes the actions that can be performed when an employee was selected to view:

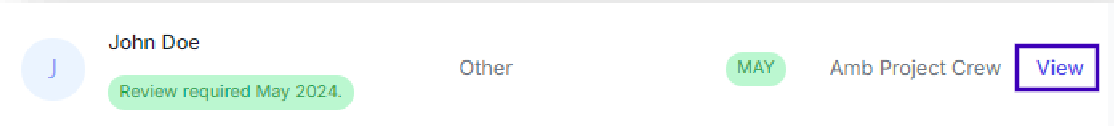
Prerequisite: Click on; ‘Employees’ available from the left menu.

From the list of employees, click on the employee that you want to review.

Two viewing options are available;

a. Employee Overview: Allows you to view information related to the employee such as, the client or site they are assigned to, name, contact number and other personal information.

From list view: Click on the ‘View’ button next to each employee to redirect to the employee overview.



From the grid view: Click on the employee name to redirect to the employee overview.

b. Period Submission Review: When selected from your employee page, you will be presented with a list of all submissions and applications processes by the individual employee, all submissions are available and accessible on the same page.

From both the list and grid view: Click on the button starting with ‘Review Required’.

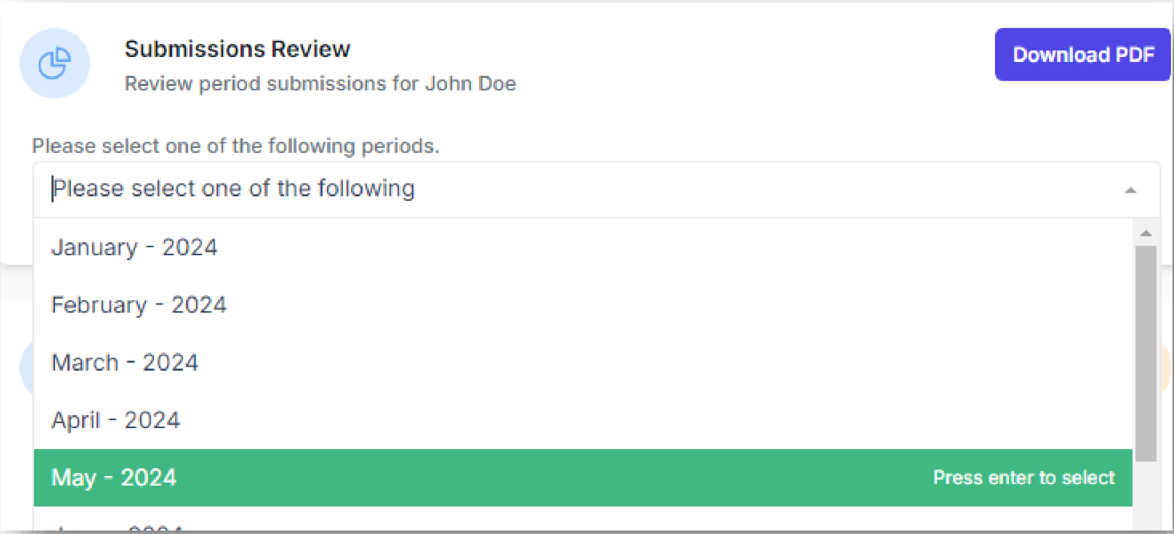
You will be redirected, directly to the employee’s ‘Periods’ page that needs revising, and approval.

For each employee, the ‘Periods’ can also be accessed from the ‘Navigation’ section. The employee navigation menu is discussed in [Chapter 12](#).

5.1 View Employee Period Submissions

When an individual employee's period was selected to review, the following views and actions follows:

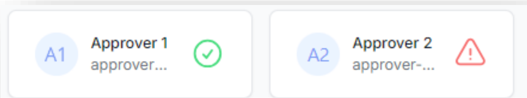
Prerequisite: Once redirected to the 'Period Submissions page, select the period by scrolling and selecting the month from the drop-down list, presented on the top of the page.



By default, all submission sections will be empty. In order to view the submissions, a month needs to be selected.

> Important Notice!
>
> Once a period submission was approved by a manager, approvers and employees are no longer allowed to make any updates or changes. This is discussed in section 5.1.e, of this chapter.

Approvers: If any approvers were linked to an employee profile, they will be displayed at the top. In addition to that, the system will also show which approver has reviewed the employee's period, and who's review is still outstanding.



Approval Actions: The second notice at the top of each employee period page, specifies the employee who has submitted the period you are currently viewing. This is also were the last required action will be done to process the period submission, by either the approvers or manager.

We will oversee the following employee submissions available to review and action:

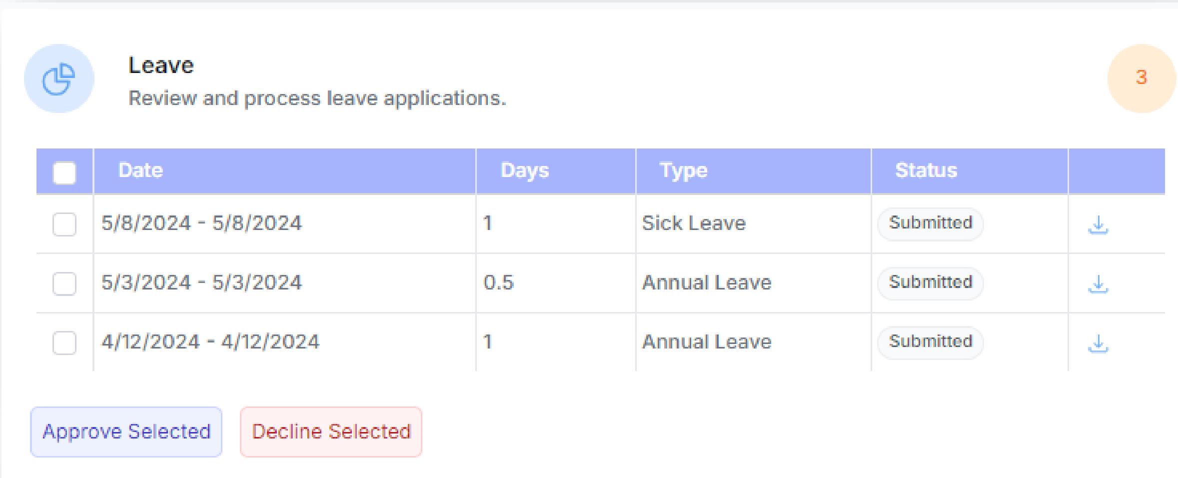
- **Leave Applications**
- **Claims**
- **Timesheets**
- **Overtime**

Each section listed above serves as a fast path. To quickly redirect to a section, click on the section from the above list.

5.1.a Employee Leave Applications

The first visible section from the employee periods, is the leave applications tab.

The following is available for review when **Leaf** is processed for approval:



- At the top-right corner, indicates the amount of pending applications that needs to be reviewed and actioned.

The leave table provides the following:

- **Selection** box
- **Date** relevant to the application.
- **Days** of leave applying for
- **Type** of leave required
- **Status** of the application
- **Download** and view option

The following steps describes the actions that may be followed for leave applications:

Prerequisite: It is strongly recommended to click on the 'download' icon, for each separate application. This will open the employee's applications on a new browser page where it can be reviewed to ensure that the information provided is accurate and precise.

The **Leave** approval process explained:

Step 1: Start by reviewing the start and end date applied for leave, the leave type and status of the request.

	Date	Days	Type	Status	
☐	5/8/2024 - 5/8/2024	1	Sick Leave	Submitted	
☐	5/3/2024 - 5/3/2024	0.5	Annual Leave	Declined	
☐	4/12/2024 - 4/12/2024	1	Annual Leave	Submitted	

Step 2: As recommended, click on the 'download' icon on the far-right side of the leave application you are reviewing. This will open the leave form completed by the employee, including any supporting documentation on a new browser window. Information listed here, may be more precise and elaborate on the reason for the leave request you are viewing.

CAPITAL PFS - LEAVE APPLICATION FORM

Name & Surname: Adam Motlalepule Mashongoane
Designation: Boilermaker
Date: 15 May 2024

Vendor: Rustenburg Platinum Mines Limited
Location: 144 Oxford Road, N/A, Rosebank, Johannesburg, 2196
Project: Amb Project Crew

NAME & SURNAME	Adam Motlalepule Mashongoane
DATE	15 May 2024
FIRST DAY	08 May 2024
LAST DAY	08 May 2024

Number of working days:

Leave Type	Days
Annual Leave	
Sick Leave	1
Maternity Leave	
Paternity Leave	
Study Leave	
Unpaid Leave	
Compassionate	
Balance:	
Current Leave days remaining:	**1.2**

Leave Application Reason:

N/A

Employee Signature:
Adam Motlalepule Mashongoane

Signature Date:
2024-05-15 09:24:59

Approver 1 Signature:
Approver 1

Signature Date:
2024-05-15 14:19:04

Step 3: Select the leave applications that you want to action, by clicking in the selection box next to each. You can select all the leave applications by clicking on the top box, or select them separately.

	Date
☑	5/8/2024 - 5/8/2024
☑	5/3/2024 - 5/3/2024
☑	4/12/2024 - 4/12/2024

Step 4: The final action to be performed for the leave application, will be to either approve or decline the selected application by clicking on the relevant button.

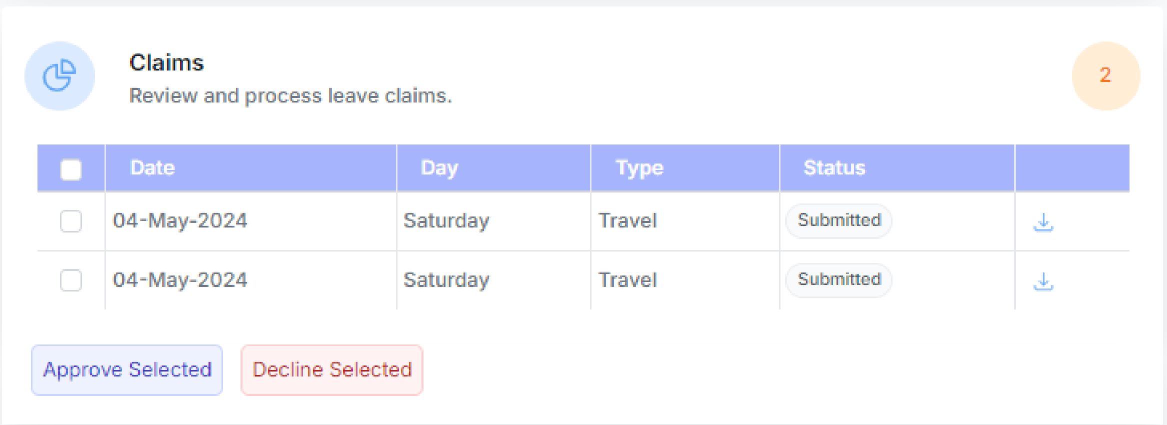
Result: The leave approval process will now be completed.

ℹ This does not conclude the overall period approval; all sections need to be completed were relevant.

5.1.b Employee Claims

The second visible section from the employee periods, is the employee claims.

The following is available for review when **Claims** is processed for approval:



- At the top-right corner, indicates the amount of pending claims that needs to be reviewed and actioned.

The claims table provides the following:

- **Selection** box
- **Date** relevant to the application
- **Day** of the week for which the claim is requested
- **Type** of claim requesting approval
- **Status** of the application
- **Download** and view option

The following steps describes the actions that may be followed with claim applications:

Prerequisite: It is strongly recommended to click on the 'download' icon, for each separate application. This will open the employee's claims application on a new browser page where it can be reviewed to ensure that the information provided is accurate and precise.

The **Claims** approval process explained:

Step 1: Start by reviewing the date for this claim request.

	Date	Day	Type	Status	
	04-May-2024	Saturday	Travel	Submitted	
	04-May-2024	Saturday	Travel	Submitted	

Step 2: As recommended, click on the 'download' icon on the far-right side of the leave application you are reviewing. This will open the leave form completed by the employee and any supporting documentation on a new browser window. Information listed here, may be more precise and elaborate on the reason for the claim request you are viewing.

CAPITAL PFS - TRAVEL CLAIM

Name & Surnam

Designation: Boilermaker

Vendor: Rustenburg Platinum Mines Limited

Location: 144 Oxford Road, N/A, Rosebank, Johannesburg, 2196

Project: Amb Project Crew

Period: May 2024

Date	Type	Reason For Travel	Signature	Supporting Documents	Kilometers	Amount
04-May-2024	Travel	Site Assistance - South Gate		✗	125	R 580.00

Employee Signature:

Employee Signature Date:

Approver 1 Signature:
Approver 1

Signature Date:
2024-05-15 14:21:15

Step 3: Select the claim applications that you want to action, by clicking in the selection box next to each. You can select all the claim applications by clicking on the top box once all was reviewed, or select them separately.

	Date
☑	04-May-2024
☑	04-May-2024

Step 4: The final action remaining for the claims application, will be to either approve or decline the selected application by clicking on the relevant button.

Approve Selected | Decline Selected

Result: The claims approval process will now be completed.

ℹ This does not conclude the overall period. All sections need to be completed.

5.1.c Employee Timesheets

As the most important part of a period submission, employee timesheets can be found on the menu, third from the top.

The following is available for review when processing **Timesheets** for approval:

Timesheets 22

Review and process submitted timesheets.

Public Holiday Auto Generated Leave

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	
	08-May-2024	Wednesday	General	09:00				Submitted	
	07-May-2024	Tuesday	General	09:00				Submitted	
	06-May-2024	Monday	General	09:00				Submitted	
	03-May-2024	Friday	General	09:00				Submitted	
	02-May-2024	Thursday	General	09:00				Submitted	

- The top-right corner, indicates the number of pending timesheets that needs to be reviewed and actioned.

The **Timesheets** table provides the following:

- **Selection**, box
- **Date**, relevant to the timesheet
- **Day**, of the week for which the timesheet was submitted
- **Type**, of timesheet, in this section the timesheet type will all be displayed as general
- **Hours**, shows the hours worked for the day
- **Leave**, indicates if there was leave submitted for the day
- **OT**, will show if there was overtime submitted for the day
- **PH**, indicates a public holiday
- **Status**, of the application
- **Download**, and view option

The **Timesheets** approval process explained:

Prerequisite: Remember that each application can be reviewed by clicking on the download icon. This will open the employee's applications on a new browser page where it can be reviewed to ensure that the information provided is accurate and precise.

Step 1: Start by reviewing the date and day for each timesheet submitted.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	

Step 2: Next, review the type and hours for the day.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	

It should be noted that your employees have two options to submit their timesheets, either individually per day, for each day or, by choosing the bulk timesheet submitted. If the bulk timesheet submission was selected, the hours will automatically be set according to the employee's daily hours as per their employment contract.

Step 3: Take note of any additional sections, such as leave, overtime or public holidays.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	

Step 4: Review the status of the timesheet. Submitted, indicates that the timesheet is still pending approval, otherwise it will specify; Approved or Rejected.

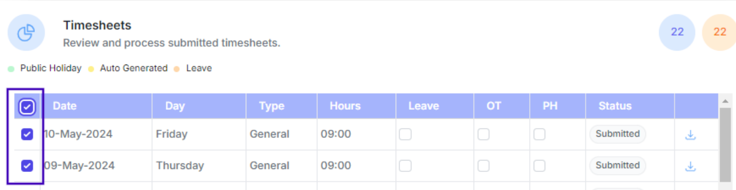
	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	

⚠ IMPORTANT NOTE

Remember, once any period was approved by the final approver, the manager, NO further actions can be performed by an approver or employee. If you are an approver viewing your employees period submission, the status may still indicate as 'Submitted', if no action can be taken, it was already accepted by the manager. Your actions for the period will remain as 'pending' as it was not yet completed prior to the final approval.

*If you are unsure, navigate to your employee, select the 'Navigation' button, and then a section to review. From the employee's profile, submissions will show as approved if the final approval was processed.

Step 5: Select the timesheet that you want to action, by clicking in the selection box next to each. You can select all the timesheets by clicking on the top box, or select them separately. Note the additional number count at the top, indicating your selected days to action.



Step 6: The final action to be performed with timesheets will be to either approve or decline the selected timesheets by clicking on the relevant button.

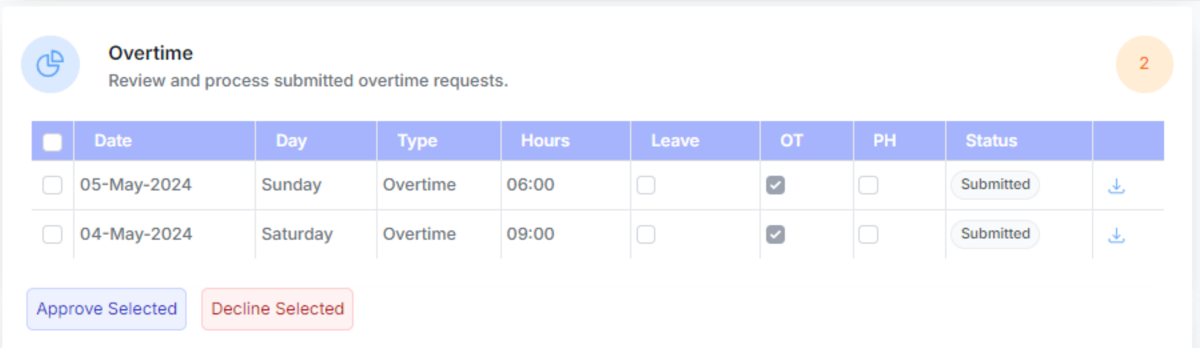
Result: The timesheets approval process will now be completed.

ℹ This does not approve the overall employee period; all sections need to be completed.

5.1.d Employee Overtime

As the most important part of a period submission, employee timesheets can be found third from the top, after the payroll was selected from the dropdown.

The following is available for review when **Overtime** is processed for approval:



The **Overtime** table provides the following:

- **Selection** box
- **Date** worked overtime
- **Day** of the week worked overtime
- **Type** will be marked as ‘Overtime’
- **Hours** worked overtime
- **Leave** indicates if there was leave submitted for the day
- **OT** will show if there was overtime submitted for the day
- **PH** indicates a public holiday
- **Status** of the application
- **Download** and view option

The **Overtime** approval process explained:

Prerequisite: It is strongly recommended to click on the 'download' icon, for each separate application. This will open the employee's applications on a new browser page where it can be reviewed to ensure that the information provided is accurate, precise, and pre-approved with a valid vote number.

Step 1: As with the other sections, start by reviewing the date and day for each timesheet submitted.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	05-May-2024	Sunday	Overtime	06:00		[x]		Submitted	
	04-May-2024	Saturday	Overtime	09:00		[x]		Submitted	

Step 2: Type will be set as 'Overtime'. View the hours that the employee is requesting overtime approval. In this section, each submission will be marked as OT (overtime), by default, you may look out for additional indications applied for leave or public holidays.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	05-May-2024	Sunday	Overtime	06:00		[x]		Submitted	
	04-May-2024	Saturday	Overtime	09:00		[x]		Submitted	

Step 4: Review the status of the overtime request. Submitted, indicates that the overtime is still pending approval, otherwise it will specify; Approved or Rejected.

	Date	Day	Type	Hours	Leave	OT	PH	Status	
	10-May-2024	Friday	General	09:00				Submitted	
	09-May-2024	Thursday	General	09:00				Submitted	

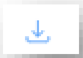
⚠ **IMPORTANT NOTE**

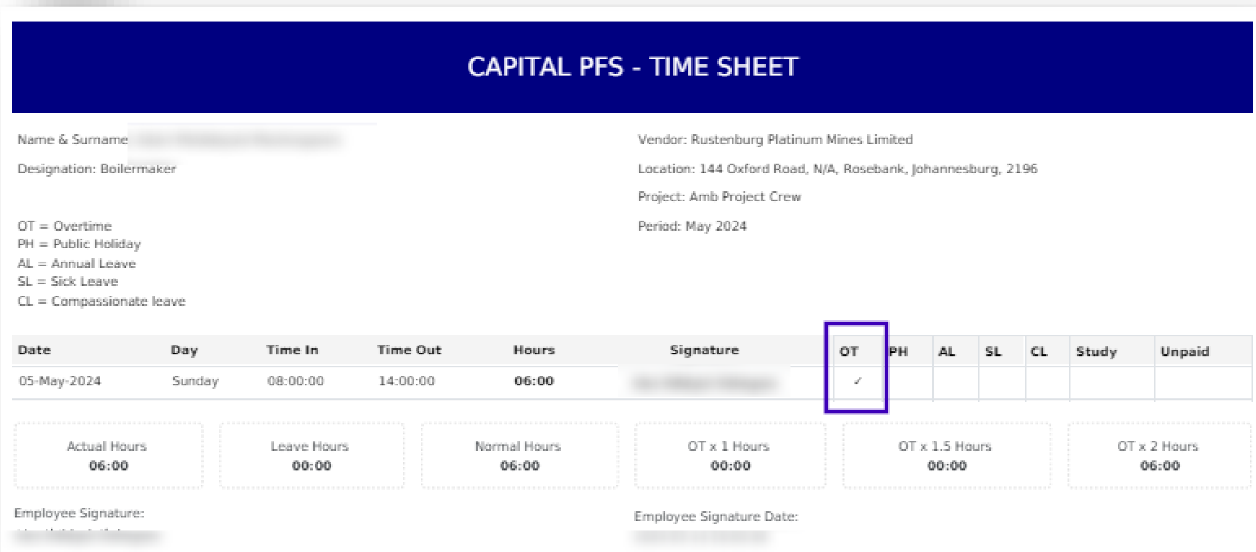
Remember, for approvers, it might show as 'Submitted' even if it was already approved by the required and final authority. If this is the case, NO further actions can be performed by an approver or employee.

*If you are unsure, navigate to your employee, select the 'Navigation' button, and then the section to review. From the employee's profile, submissions will show as approved if the final approval was processed.

Step 5: For overtime this is an essential step that should not be overseen. Overtime applications should be reviewed, to ensure accurate time, data and information. This type of submission requires a vote number approving the overtime for which the employee is requesting approval.

Click on the 'download' icon on the far-right side of the overtime application you are reviewing. This will open the overtime form completed by the employee, including any supporting documentation, on a new browser window. Information listed here, may be more precise and elaborate on the reason for the overtime request you are viewing.





CAPITAL PFS - TIME SHEET

Name & Surname

Designation: Boilermaker

Vendor: Rustenburg Platinum Mines Limited

Location: 144 Oxford Road, N/A, Rosebank, Johannesburg, 2196

Project: Amb Project Crew

Period: May 2024

OT = Overtime
PH = Public Holiday
AL = Annual Leave
SL = Sick Leave
CL = Compassionate leave

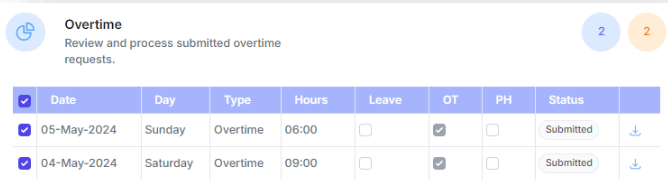
Date	Day	Time In	Time Out	Hours	Signature	OT	PH	AL	SL	CL	Study	Unpaid
05-May-2024	Sunday	08:00:00	14:00:00	06:00		✓						

Actual Hours	Leave Hours	Normal Hours	OT x 1 Hours	OT x 1.5 Hours	OT x 2 Hours
06:00	00:00	06:00	00:00	00:00	06:00

Employee Signature:

Employee Signature Date:

Step 5: Select the overtime that you want to action, by clicking in the selection box next to each. You can select all the leave applications by clicking on the top box, or select them separately. Note the additional number count at the top, indicating your selected overtime applications to action.



Overtime
Review and process submitted overtime requests.

2 2

☑	Date	Day	Type	Hours	Leave	OT	PH	Status	
☑	05-May-2024	Sunday	Overtime	06:00	☐	☑	☐	Submitted	
☑	04-May-2024	Saturday	Overtime	09:00	☐	☑	☐	Submitted	

Step 6: The final action to be performed for the overtime application, will be to either approve or decline the selected application by clicking on the relevant button.

Result: The overtime approval process will now be completed.

ℹ This does not conclude the overall period, all sections need to be completed.

5.1.e Period Submission Approval

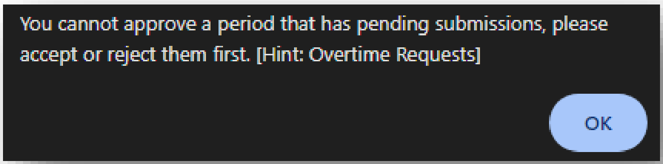
The approval for an employee's period submission, serves as the last and final action required from approvers and managers, in order to complete and finalise the submissions for a payroll period.

The following describes the process of approving a period submission for payroll:

Prerequisites

For Managers:
As a manager, it is important to review and consider the reviews provided by approvers. With each payroll submission, it can be noted which approvers completed a review and which reviews is still outstanding.

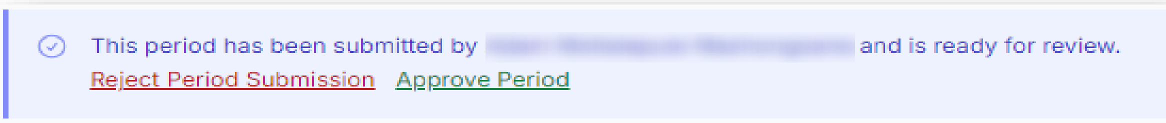
For Managers and Approvers:
Before a period submission can be approved, each section needs to be reviewed and actioned accordingly. The top number should display '0', which will indicate that there is no more pending application for any section. Should there be any pending applications, the approval will not be processed.



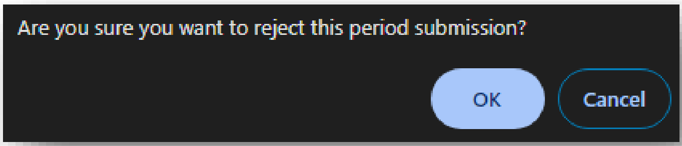
The following sections needs to be reviewed and completed:
Leave
Claims
Timesheets
Overtime
Each section listed above serves as a fast path. To review the steps for any section, click on the section from the above list.

Period submission approval actions:

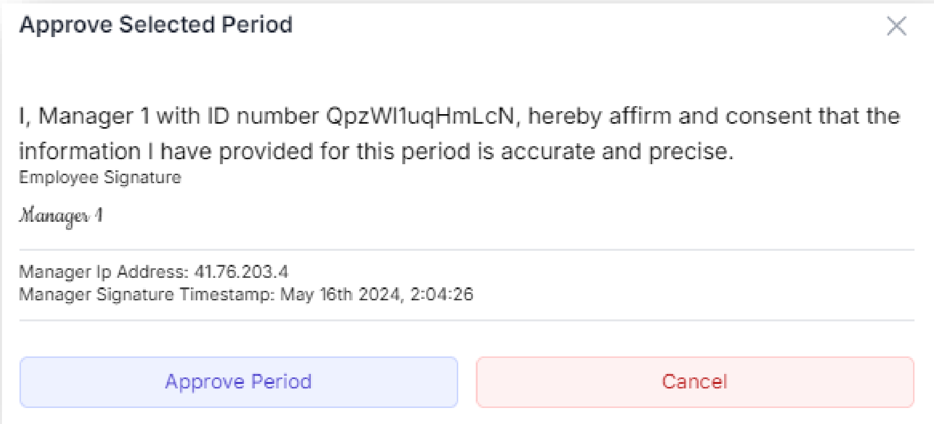
Step 1: Available at the top section of the period submissions page, is the option to either approve or reject a period submitted by an employee. To process the period submission, select either; 'Approve Period', if all given information was accurate and up to date, or 'Reject Period Submission', if any information was provided incorrectly, needs changes or updates, or has outstanding documents.



Reject Result: You will be required to confirm the rejection by clicking on the system pop-up box displayed when the reject action was selected. If the period was rejected by an approver, the period can still be approved by a manager. Once again, it is therefore essential to review all available information, approvals or rejections.



Approve, Results: Both the manger and approvers, need to confirm that the information they reviewed for the period is accurate and precise, this is confirmed by using their digital signature.



Approver, approval, will indicate to the manager that the period was reviewed by an approver, and the information is accurate and correct as per the approver's reviews, findings and digital signature acknowledgement. A manager can see which approver has viewed a employee's period submission, and who has not yet.

Manager approval, can only be actioned after at least one approver reviewed a period submission. The manger can then process the period to payroll as the final authorization and confirmation that all the given information is accurate and correct.

Manager approval serves as the final authority and requirement to complete a period submission. Once a period was approved by a manager, it will be locked and now further actions is allowed by the employee or approvers.

As a manager, it is therefore imperative to review and consider the given information and approvals, before sending the final approval for a payroll period.

5.2 Period Submissions Notes

The following should be noted, and might be of some assistance when you are completing or approving employee period submissions.

- Dependant on the employment term, the day after the last day of the payroll period, is the day that a period submission must be submitted for approval.
  For Example: If your payroll period begins on the 11th of each month, and ends on the 10th, the period for this payroll should be submitted no later than the 11th of the same month, or one day after the last day in the payroll period

- Due to possible unforeseen circumstances that might arise, the system allows an additional couple of days to submit payroll period submissions and approvals.

- In addition to the extra days provided to submit a period, the system will also send email reminders for outstanding period submissions and approvals.

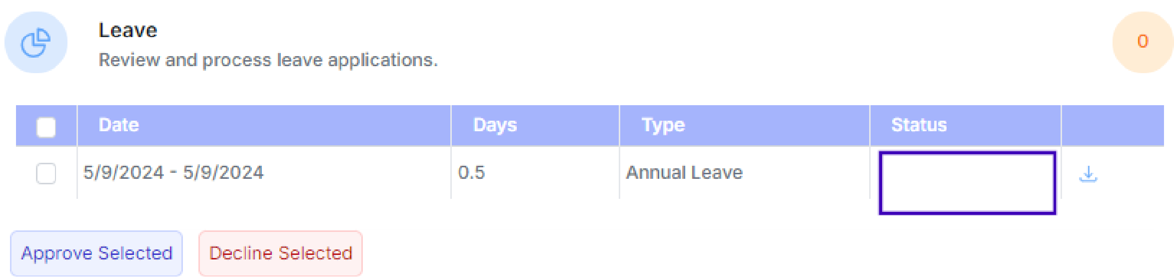
- **Remember**, claims, overtime and timesheets are an essential part of the payroll period. Therefore, once a period submission is pending approval, it serves as the employee's final action and acknowledgement that ALL the required information for the period was indeed updated, therefore none of the mentioned can be changed or deleted once a period was submitted.

- In the case were a claim, overtime or timesheet was missed, or needs to be corrected, a manager or approver needs to decline the section or period, in order for the employee to make changes or add submissions.

- Payroll periods that have passed, can't be changed or submitted.

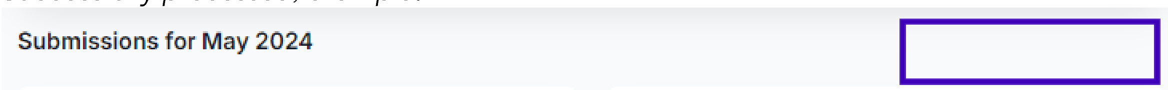
- In the case were an employee cancelled a request, the status will be blank, as the request is no longer pending, and can't be approved or rejected.

Employee cancellation, example:

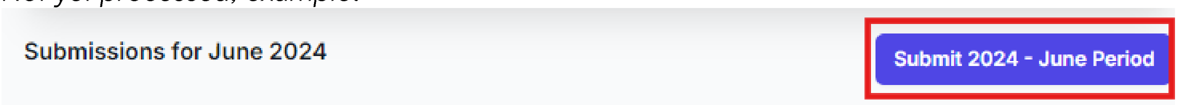


- From the Employees page, there may be employees who have updated and send their submissions, however, from the employee page, it still shows as 'Period Pending' for the current payroll period you are reviewing. Period Pending for May 2024
  In this case, the Employee did not click on the big blue '**Submit**' button to complete the process. If the 'Submit' button is no longer on the employee's period screen, the period was already processed for approval.

  Successfully processed, example:

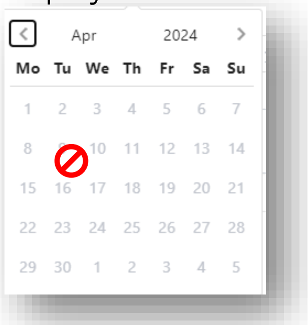


  Not yet processed, example:



- Period Pending, if highlighted in grey, it indicates that the current period was successfully processed. The following period submission is then due, but not yet outstanding. Period Pending for June 2024

- If the period submission deadline was missed, the days that form part of the period missed, will be greyed out and no longer available to select from the dates. In this case, arrangements need to be made with Capital PFS, in order for the employee to submit their period submission.



- Before a manager will be able to review an employee's period submission, and in the case that the employee has approvers assigned to their profile, the period must first be reviewed and approved by at least one approver.

- The manager approval, serves as the final and last required approval to process an employee's period submissions for payroll. Once approved by a manager, no changes can be made by the employee. Submissions not included in the period, such as claims or overtime, can't be added after the period was approved.

6 Leave Requests

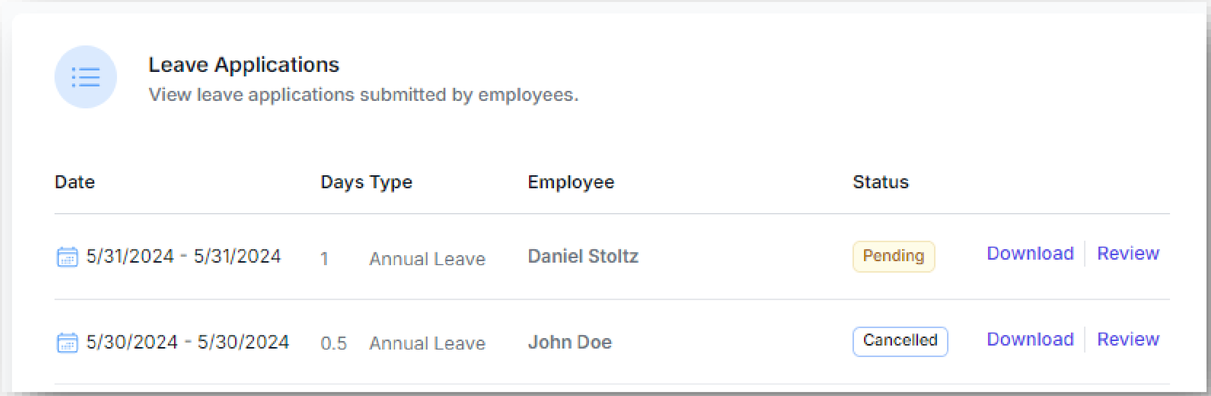
By the end of this section, you'll be equipped with the knowledge to effortlessly manage employee leave applications like a pro.

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

6.1 The Leave Page

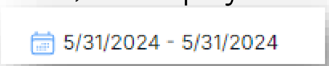
Once selected, the following can be viewed:

All Employee Leave Applications, is displayed when '**Leave**' was selected from the side menu.



Information displayed on the '**Leave**' page:

Date, will display the date that the employee requested to take leave.

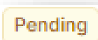


Days, will display the requested number of days leave was applied for.

Type, refers to the type of leave requested by the employee.

Employee, this column will display the employee that submitted the leave request.

Status, indicates whether the leave application is still pending, cancelled, approved or declined.



6.2 Leave Applications

From the leave page, logged in as the manager or approver, you have two options that can be selected.

Download | Review

6.2.a Download Leave Application

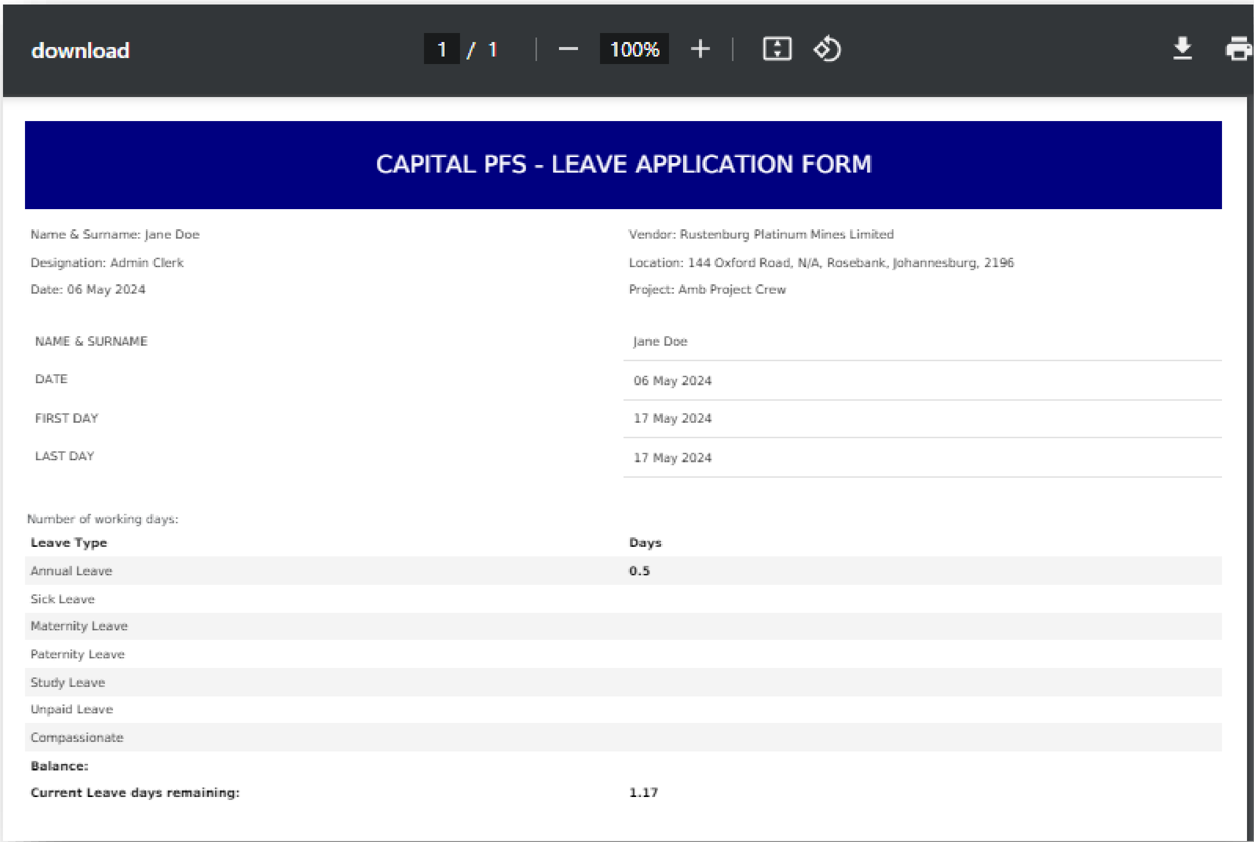
Prerequisite:

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

How to download a leave application:

Step 1: Select the **'Download'** option provided next to of each submitted leave application. Download

Result: Once 'Download' was selected, the 'Leave Application Form' will be presented on a new browser window and can be reviewed. From the new browser window, you can download or print the document.



download 1 / 1 100%

CAPITAL PFS - LEAVE APPLICATION FORM

Name & Surname: Jane Doe
Designation: Admin Clerk
Date: 06 May 2024

Vendor: Rustenburg Platinum Mines Limited
Location: 144 Oxford Road, N/A, Rosebank, Johannesburg, 2196
Project: Amb Project Crew

NAME & SURNAME	Jane Doe
DATE	06 May 2024
FIRST DAY	17 May 2024
LAST DAY	17 May 2024

Number of working days:

Leave Type	Days
Annual Leave	0.5
Sick Leave	
Maternity Leave	
Paternity Leave	
Study Leave	
Unpaid Leave	
Compassionate	
Balance:	
Current Leave days remaining:	1.17

6.2.b Review Leave Applications

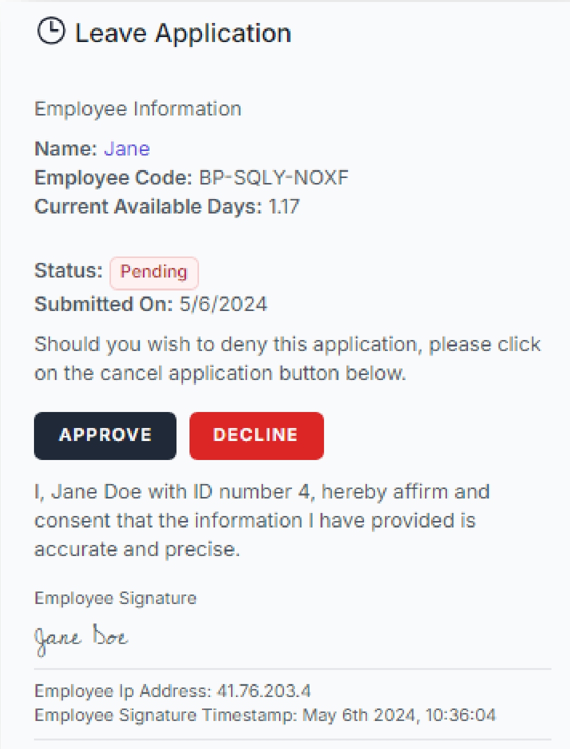
It is an essential requirement to properly review all given information before it is approved or declined.

Prerequisite:

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

Step 1: Select the '**Review**' option provided next to each submitted leave application.

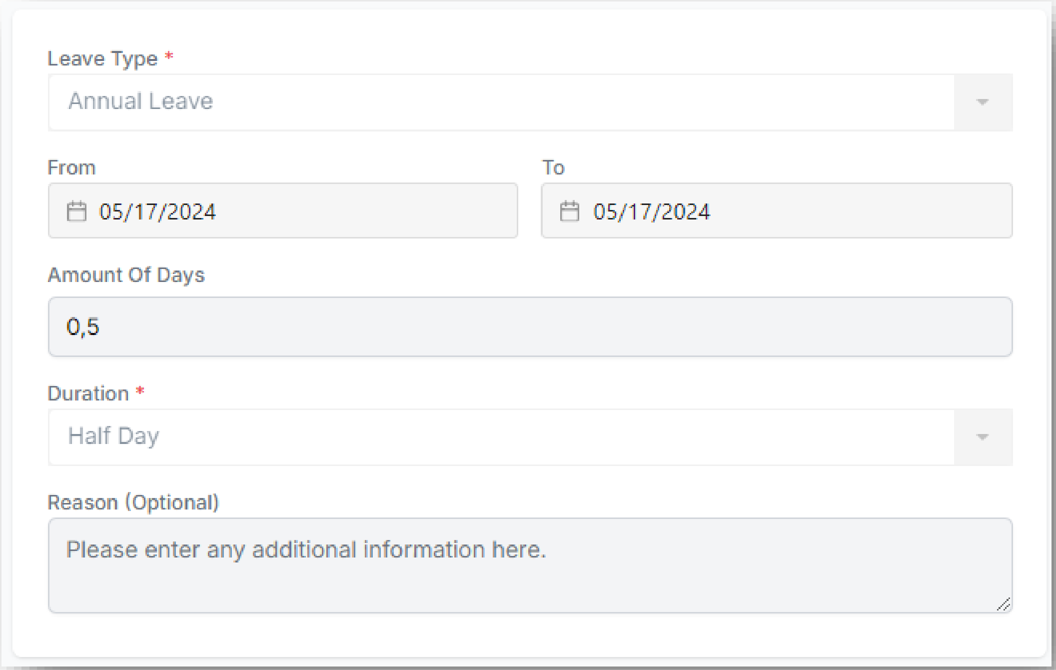
Result: When the 'Review' option was selected, you will be redirected to the leave application submitted by the employee. On this page the following will be listed:



The employee's **Name**, **Code** and **Current Available Days**, visible at the top section of the page.

The **Status** of the application, the **date** on which it was submitted, and the **Employee Signature**, including the **IP Address** from where it was submitted, and **Signature Timestamp** will be displayed when a leave application is viewed.

To the right of the page, the leave form will be displayed, showing the **Leave Type, Dates** selected for leave, the **number** of total days of leave, the **duration** and, if provided, the **reason** for the leave.



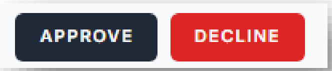
6.3.c Processing a Pending Leave Application

Prerequisite:

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

Step 1: Select the '**Review**' option provided next to submitted leave application.

Step 2: From the leave application page, you have two options, you can either **Approve**, or **Decline** a leave request by clicking on either one of the two buttons.



Results:

Approve; will set the leave application and adjust the employees available leave balance accordingly.

Decline; will reject the leave request. In this case the employee will be able to resubmit a leave request for the same period declined.

ℹ *Employee leave can be viewed, either when Leave Requests was selected from the side menu, or from the employee page, available from the Navigation menu.*

7 Employee Timesheets

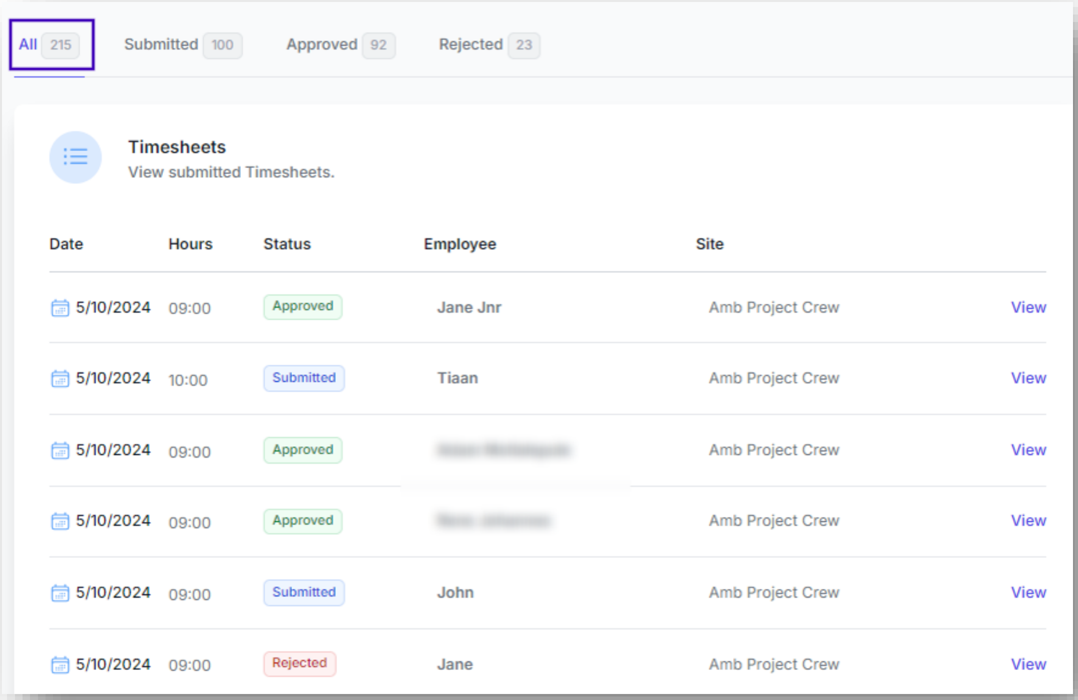
The following section will guide you in order to harness the full power of our Employee Portal to effortlessly process Employee **Timesheets**.

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

7.1 The Timesheets Page

Once Timesheets was selected from the side menu, the following can be viewed:

All Employee Timesheets, is displayed by default once '**Timesheets**' was selected.



The following information can be viewed from the **Timesheets** page:

- On the top section, the page you are currently viewing will be underlined.
- **Date**, indicates the date on which the timesheet was submitted
- **Hours**, shows the number of hours worked for that specific day
- **Status**, indicates if the timesheet is still pending, approved or rejected
- **Employee**, will show the name of the employee who has submitted the timesheet
- **Site**, will be the site to which the employee is assigned to

From the **'Timesheets'** page, by clicking on the available options displayed, the following will be listed:

Submitted Timesheets, can be viewed once selected from the top section.

All 215 | Submitted 100 | Approved 92 | Rejected 23

Date	Hours	Status	Employee	Site	
5/10/2024	09:00	Submitted	John	Amb Project Crew	View
5/9/2024	12:00	Submitted	John	Amb Project Crew	View
5/9/2024	10:00	Submitted	Tiaan	Amb Project Crew	View
5/9/2024	09:00	Submitted	John	Amb Project Crew	View
5/8/2024	12:00	Submitted	John	Amb Project Crew	View

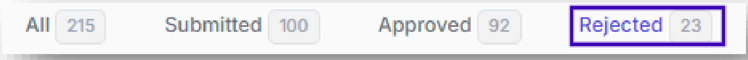
Approved, will display the employee timesheets that was approved.

All 215 | Submitted 100 | Approved 92 | Rejected 23

Timesheets
View submitted Timesheets.

Date	Hours	Status	Employee	Site	
4/28/2024	09:00	Approved	Jane	Amb Project Crew	View
4/27/2024	09:00	Approved	Jane	Amb Project Crew	View
4/26/2024	09:00	Approved	Jane	Amb Project Crew	View
4/26/2024	09:00	Approved	[illegible]	Amb Project Crew	View
4/26/2024	09:00	Approved	Jane Jnr	Amb Project Crew	View

Rejected, refers to timesheets that was declined by either a approver or a manager.




Timesheets
View submitted Timesheets.

Date	Hours	Status	Employee	Site	
5/10/2024	09:00	Rejected	Jane	Amb Project Crew	View
5/9/2024	09:00	Rejected	Jane	Amb Project Crew	View
5/8/2024	09:00	Rejected	Jane	Amb Project Crew	View
5/7/2024	09:00	Rejected	Jane	Amb Project Crew	View
5/6/2024	09:00	Rejected	Jane	Amb Project Crew	View

From the Timesheets page, for any one of the sections selected to view, it will show all the employee's data related to that section. E*mployee Timesheets can be viewed, either when Timesheets, was selected from the side menu, or from the employee page, available from the Navigation section.*

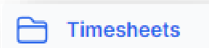
7.2 Timesheets

7.2.a View a Timesheet

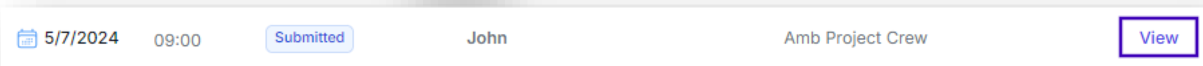
You can view different employee timesheets from the **Timesheets** section. The following steps describes the process.

The timesheet view explained:

Prerequisite:

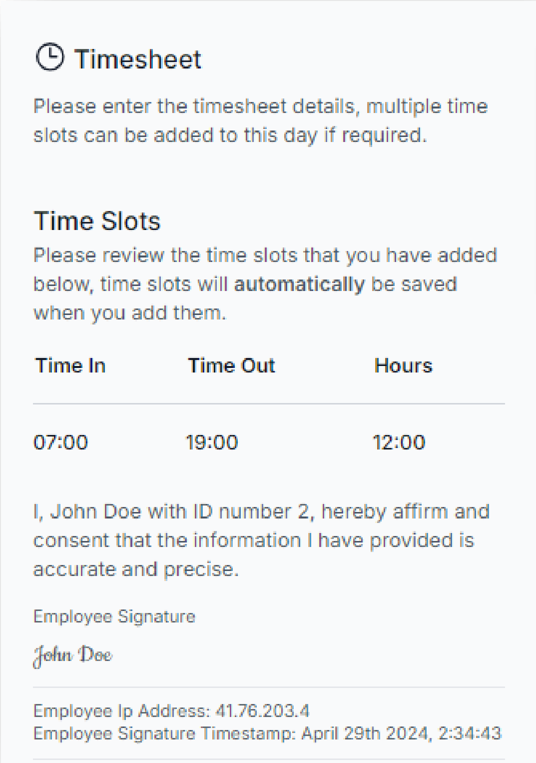
a. From the side menu, click on; **Timesheets** 

Step 1: Once navigated to the timesheets section, click on; **View**, next to the timesheet you want to view. 



Result: You will be redirected to the employee timesheet submitted for the selected day.

The employees starting and ending hours for the day's work can be viewed, the employee's digital signature and the time on which the timesheet was submitted.

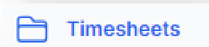


7.2.b Processing Submitted Timesheet

Employee timesheets can be processed from the '**Timesheets**' page, or from the employee's period submission available from the employee's navigation section.

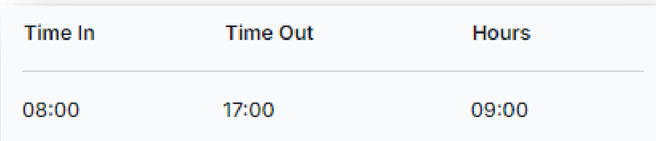
The steps explained when processing a single day's timesheet of an employee:

Prerequisites:

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

Step 1: Once navigated to the timesheets section, click on; **View**, next to the employee timesheet that you want to view. 

Step 2: Review the time in, time out and total hours for the day, as captured by the employee:



Step 3: Complete the action by clicking on either the '**Approve Timesheet**' or '**Reject Timesheet**' button.

Results:

Approve; will process the timesheet and hours work for the current payroll period

Reject; will reject the days timesheet for the current payroll period. If there are any changes required by the employee, it can only be done after a timesheet was rejected.

> ⚠ **Remember**
> Once a timesheet is pending approval, it will be locked and can no longer be changed.

ℹ The above-mentioned process applies to a single day's timesheet only. For a recap on bulk timesheet approvals, you can click here.

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8 Overtime Submissions

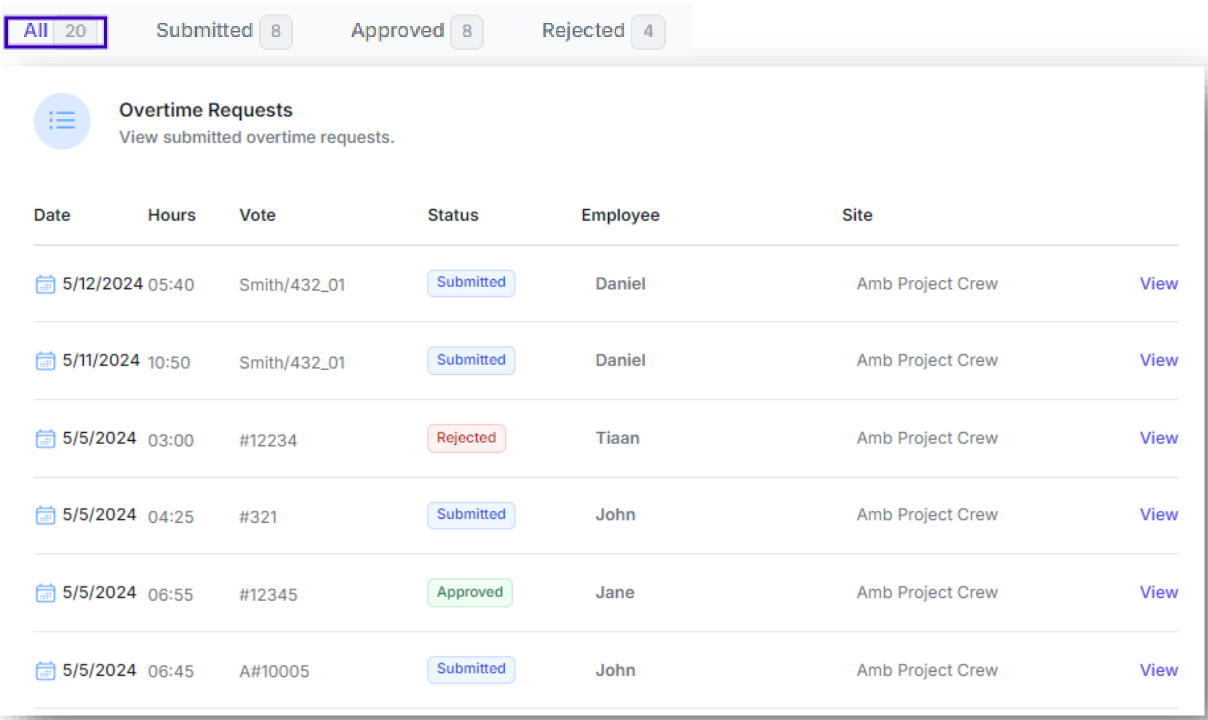
This section will guide you through the processes to effortlessly manage employee overtime in the portal.

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

8.1 The Overtime Page

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

When Overtime was selected, the page will by default display all employee overtime requests.



Date	Hours	Vote	Status	Employee	Site	
5/12/2024	05:40	Smith/432_01	Submitted	Daniel	Amb Project Crew	View
5/11/2024	10:50	Smith/432_01	Submitted	Daniel	Amb Project Crew	View
5/5/2024	03:00	#12234	Rejected	Tiaan	Amb Project Crew	View
5/5/2024	04:25	#321	Submitted	John	Amb Project Crew	View
5/5/2024	06:55	#12345	Approved	Jane	Amb Project Crew	View
5/5/2024	06:45	A#10005	Submitted	John	Amb Project Crew	View

The following information can be viewed from the **Overtime** page:

- The top section will underline the page that you are currently viewing
- **Date**, indicates the date on which the overtime was worked
- **Hours**, shows the number of hours worked overtime
- **Vote,** displays the vote number of the higher authority who approved the employee to work the requested overtime.
- **Status**, indicates if the overtime request is still pending, approved or rejected
- **Employee**, will list the name of the employee who has submitted the overtime
- **Site**, will be the site to which the employee was assigned to

8.2 Overtime Applications

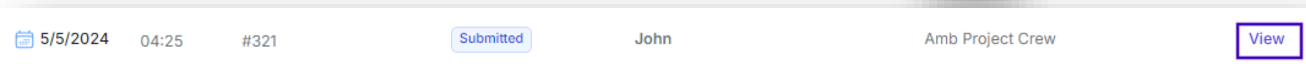
8.2.a Viewing an Overtime Request

Overtime requests can be submitted from the employee portal. Overtime applications is submitted by the employee. This action that needs to be completed for each calendar day.

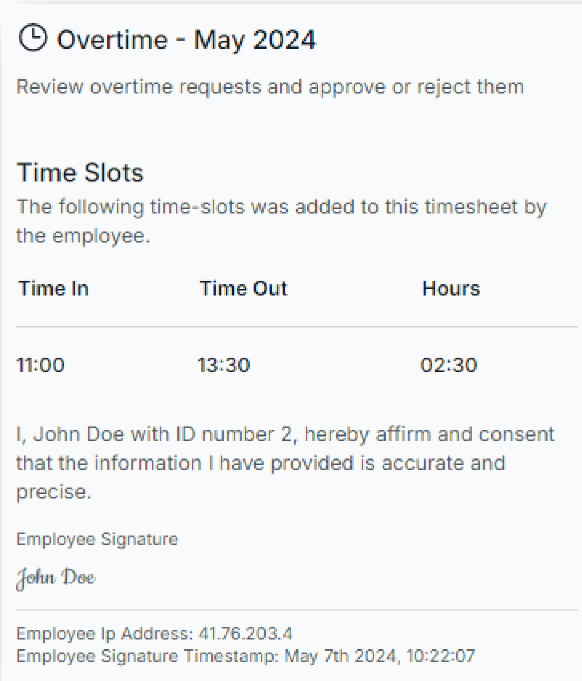
The following describes the steps to follow when a new overtime request is viewed:

Prerequisites: To review a new overtime request, click on; ‘**Overtime**’, available on the left menu.

Step 1: Once navigated to the overtime section, click on; **View**. 



Result: You will be redirected to the employee’s overtime submitted for the selected day. The employee overtime starting and ending hours for the day, the employee’s digital signature and the time on which the timesheet was submitted will be displayed.



⚠ **NOTE**
For each day’s overtime requested, there might be more than one time slot added.

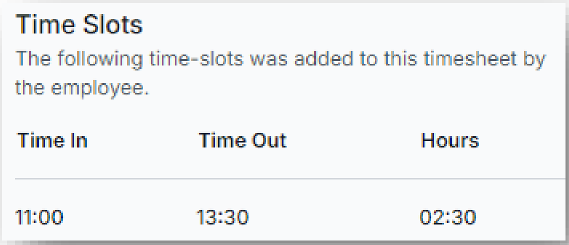
8.2.b Processing Employee Overtime

The following describes the steps to follow when an overtime request is processed:

Prerequisites: To review a new overtime request, click on '**Overtime**' from the left menu.

Step 1: Once navigated to the overtime section, click on; **View**, next to the employee overtime request that you want to view. 

Step 2: Review the time in, time out and total hours for the day, as captured by the employee:



Step 3: Complete the action by clicking on either the '**Approve Overtime** or '**Reject Overtime** button.

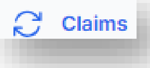
Results:

Approve; will process the overtime timesheet and hours worked for the current payroll period.

Reject; will reject the overtime timesheet for the current payroll period. If there are any changes required by the employee, it can only be done after the overtime request was rejected.

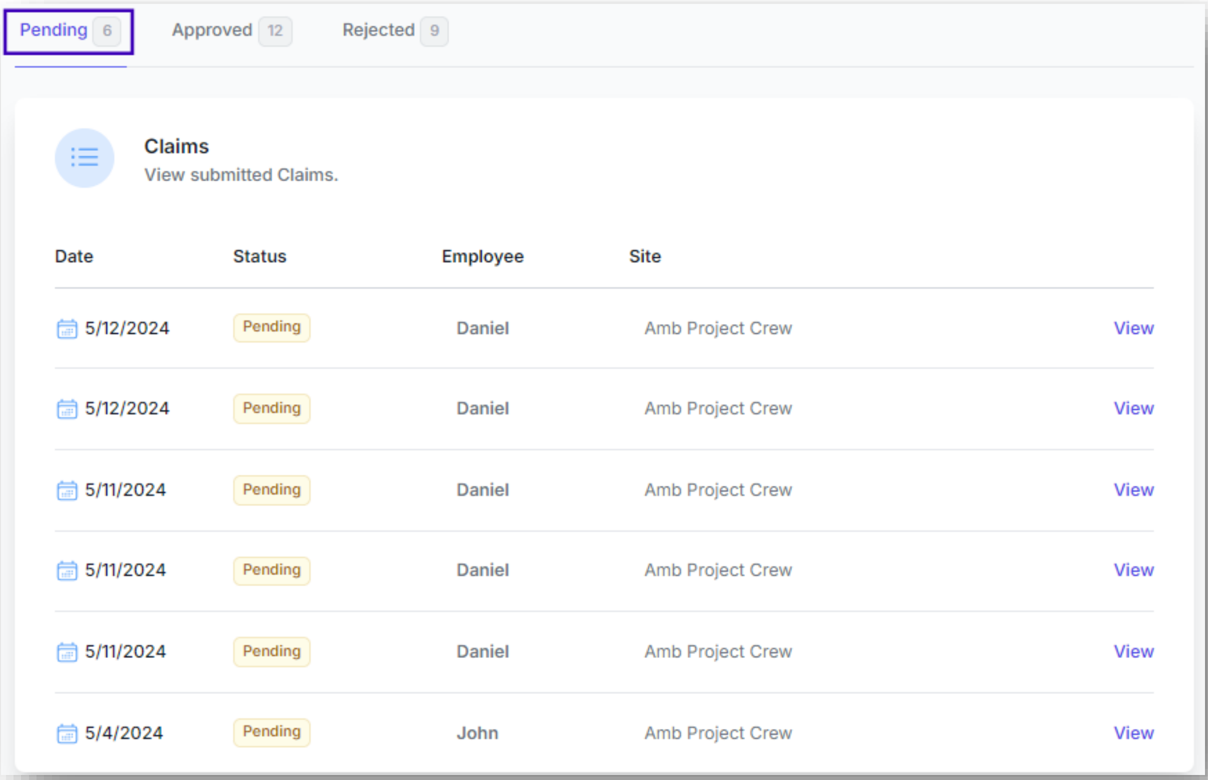
> ⚠ **Remember**
> Once an overtime application is pending approval, it will be locked and can no longer be changed.

9 Employee Claims

The claims section, also available from your side menu, can easily be accessed when clicking on '**Claims**'. 

9.1 The Claims Page

Slightly different from the leave, timesheets and overtime pages, when redirected to the claims section, all the pending application will be the first view.



The following information can be viewed from the **Claims** page:

- The top section will underline the page that you are currently viewing
- **Date**, indicates the date for which the claim was submitted
- **Status**, indicates if the claim is still pending approval, approved or rejected
- **Employee**, will list the name of the employee who has submitted the claim
- **Site**, will be the site to which the employee was assigned to

9.2 The Employee Claims

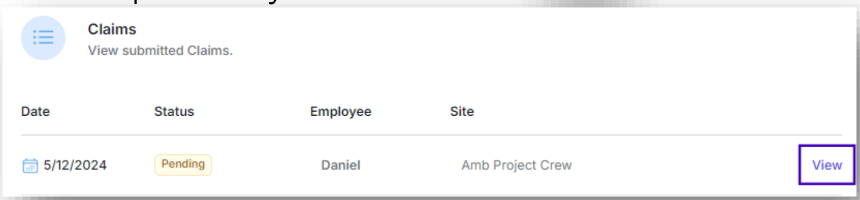
9.2.a View and Processing Employee Claims

For each new claim submitted on the system, it is strongly recommended that the requests be properly reviewed before any actions is taken.

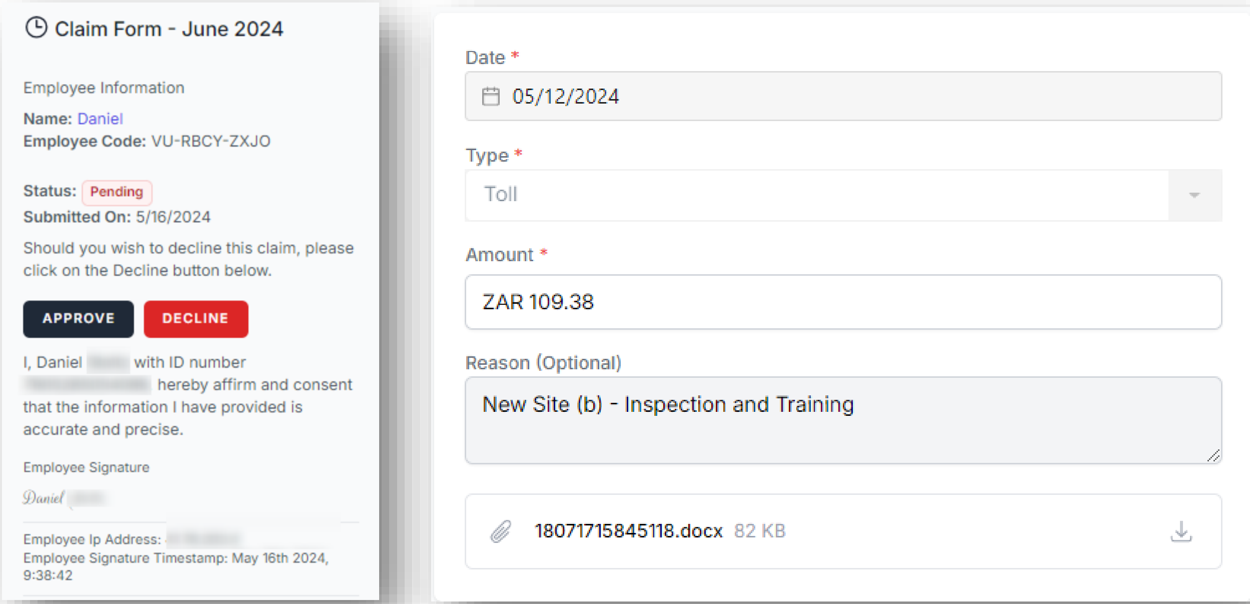
The following describes the steps to follow when a claim is reviewed:

Prerequisite: From the left menu, click on; '**Claims'**, to redirect to the claims section.

Step 1: Once navigated to the claims section, click on; **View**, next to the employee's claim request that you want to view. 



Step 2: You will be redirected to the employee's claim form where you can review the employee information, date, type of claim, the additional information, reason and supporting documents for the requested claim.



Step 3: To complete the process, select one of the two available options

Results:
Approve, will process the claim and include it in the current payroll period
Decline, will decline the claim and it will not be included in the current payroll period. If any changes are required, the employee can update a claim only once it was declined.

> ⚠ **NOTE**
> **For 'Toll' and 'Other' claims, supporting documents is mandatory. The system will not process these claims if there are no supporting documents added.**

10 Documents

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

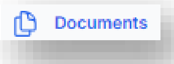
The documents section will have all documents associated to your employment with Capital PFS. Documents listed here, is not associated to you and not the employees assigned you. This is your personal documents and may include documents such as your employment contract, incident notifications, medical documents, and other important paperwork.

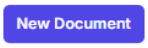
10.1 Document Management

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

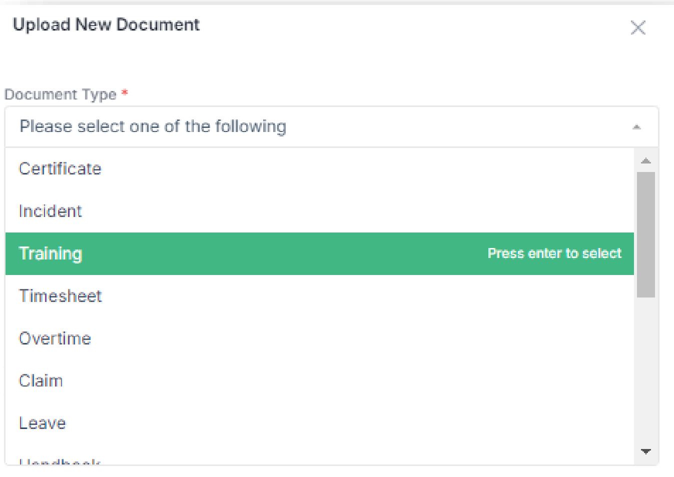
The process of managing your employee documents:

Prerequisites:

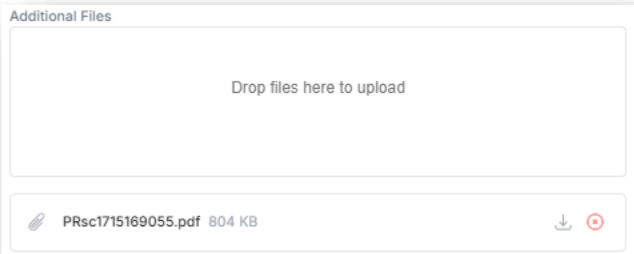
a. From the side menu, click on; **Documents.** 

b. Next, once navigated to the documents section, to add a new document, click on the '**New Document**' button. 

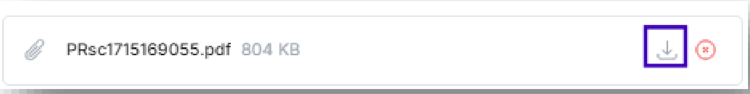
Step 1: Select the correct document type from the drop-down list.



Step 2: 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.

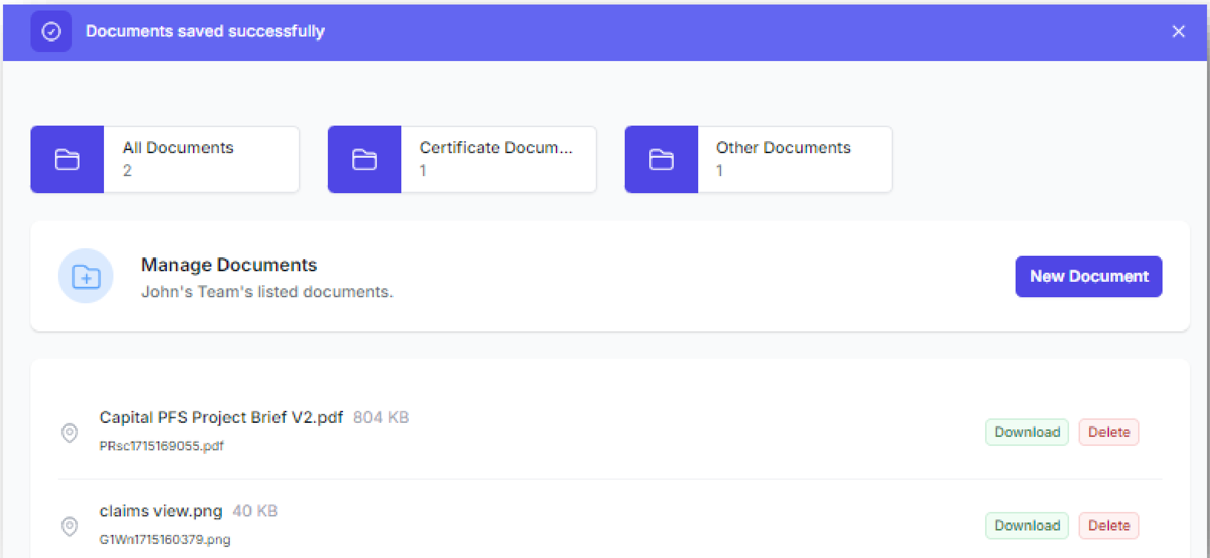


Step 3: By clicking on the 'Download' icon, you can review your uploaded document, ensuring that it is the correct file. The document will be available to review from your downloads folder.



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 and linked to the correct folder if a document type was selected. From the documents section, you can download or delete certain files.



NOTE

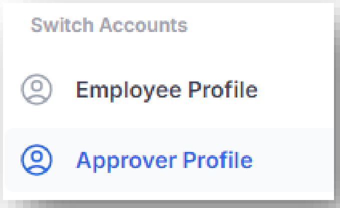
From the employee portal, supporting documents that was uploaded by the employee for any type of submissions, will also be listed in the employee's documents section.
To avoid large packages from being generated, it is strongly recommended not to upload duplicate documents for a period submission.

Side Menu

11. Switch Accounts

The last section available on the side menu, is the '**Switch Accounts**' option.

If you have 2 different user roles for the system, it will be listed here.



When and how to switch your account once logged into the system:

Prerequisite: Login to the system using your user credentials and password.

The account currently logged into the portal, will be highlighted in blue.

Step 1: Select the appropriate user account required for different tasks.

Result: Your system view, and available user tasks and options will be changed. Actions that can be performed will be in accordance to the selected user account, changing the permissions and available options associated to each user type.

The two available options explained:

Employee Account: In the case that you are submitting your own timesheets, claims, overtime, or leave applications for your personal employee payroll period, the '**Employee Profile**', account type should be used.

Manager / Approver Account: In the case that you are reviewing and processing employee period submissions, you need to be logged in, or switched to the '**Manager Profile**', or '**Approver Profile**', in order to process approvals or rejections, and finally the overall employee periods.

The 'Switch Account' is the last section of your manager or approver menu, which concludes most of the system actions and tasks that you will need to perform.

In the next chapter, we will review the sections, actions, and information available from the Employee Navigation.

Table of Content

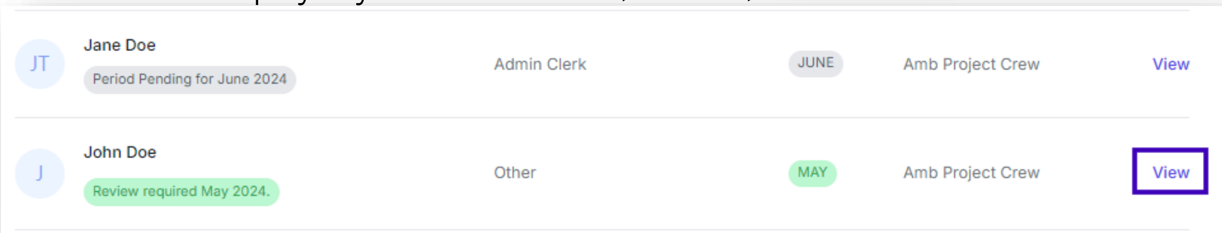
12 Employee Navigation

As a manager, or approver, you have been assigned to certain employees. It is therefore required from you to review and action certain tasks in due time for each employee, and for each payroll period. Although most actions were already explained in previous chapters, this chapter will guide you through the available options and actions when you are viewing a single employee.

Prerequisite:

a. From your side menu, select; '**Employees'** to redirect to your employees' section were all the employees assigned to you will be listed. 

b. Next to the employee you want to review, click on; '**View**'.



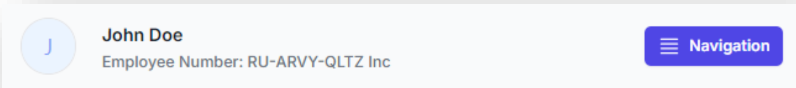
12.1 The Employee Overview Page:

The following information will be available to view for each employee:

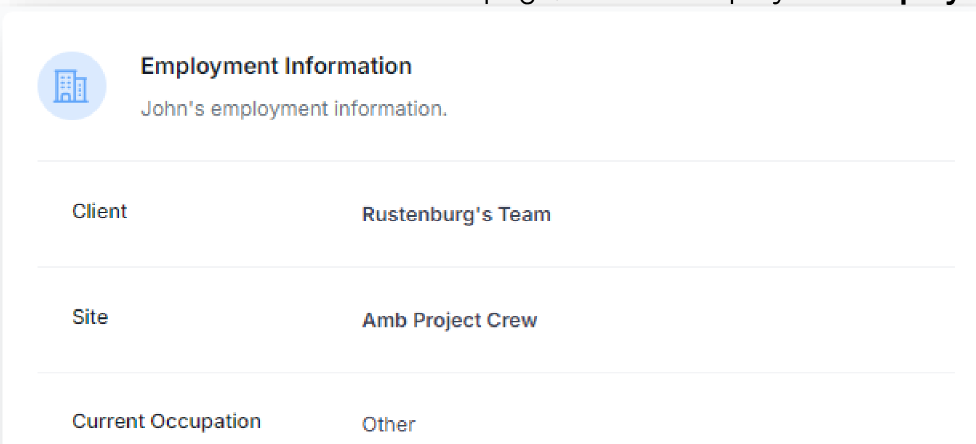
The employee overview, will be your first view when an employee was selected to view.

The top section shows the employee's:

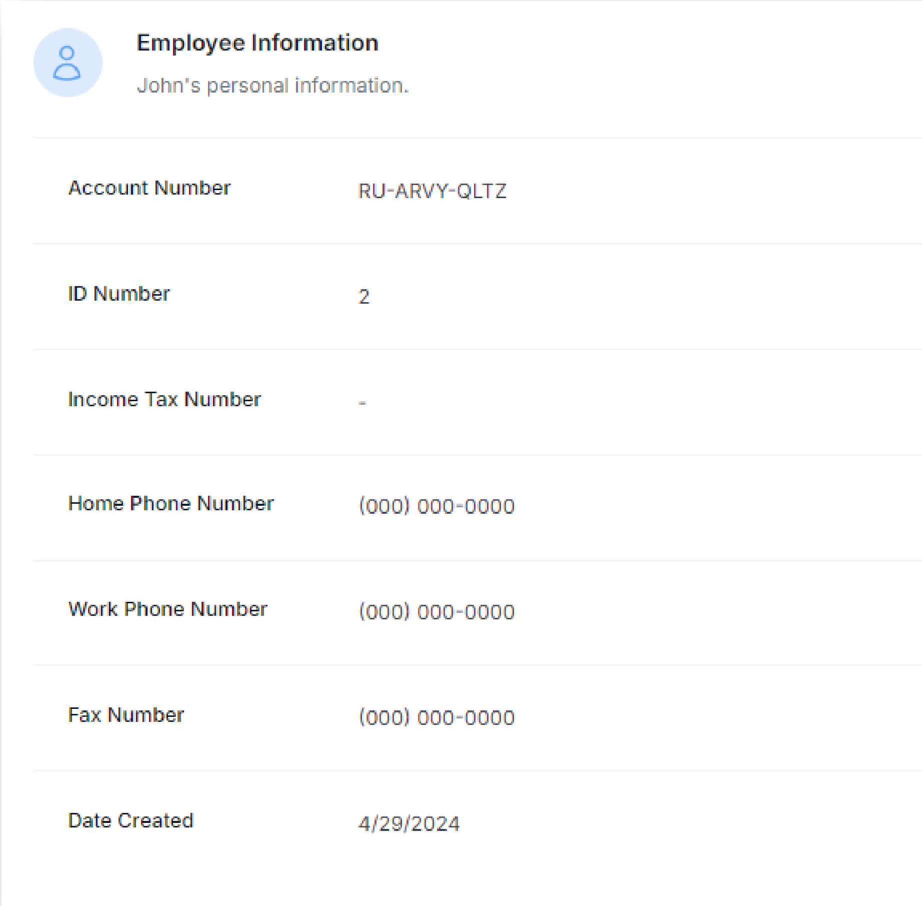
- **Name and Surname** of the selected employee, as captured on the system
- Unique **Employee Number**, generated by the system once an employee or candidate is added
- **Navigation** button, from were certain tasks can be performed



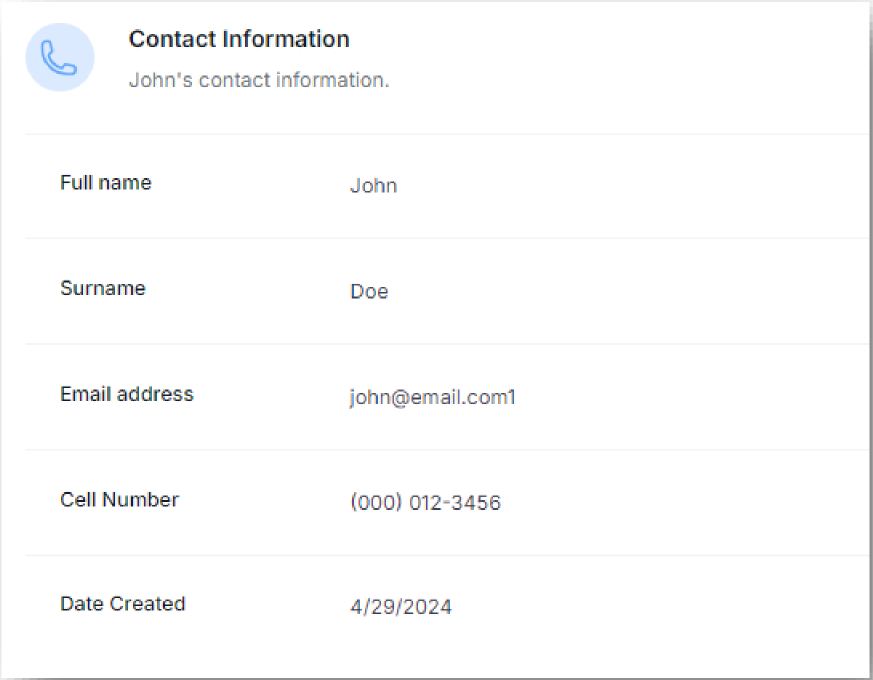
The first container on the overview page, lists the employee's **Employment Details.**



The second container, lists the **Personal Information** of the selected employee.



Finally, the last section lists the employee's **Contact Information**.

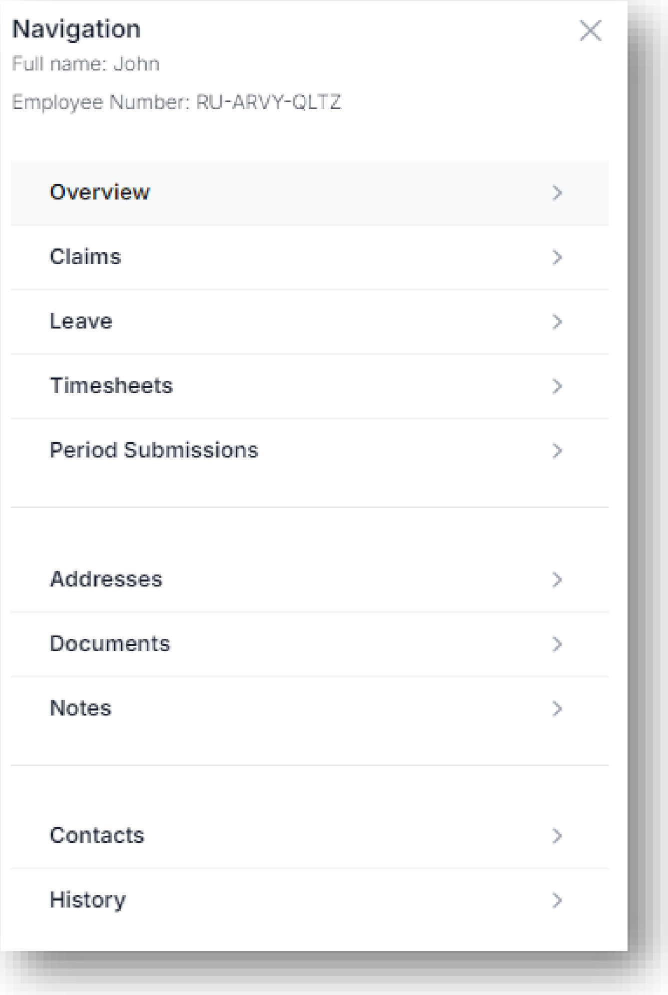


Navigation Menu

Next on the employee page, let us explore the **Navigation** menu.

The navigation menu available from each employee page is discussed in the following sections. Alternatively, you can jump to a specific section by clicking on it from the responsive menu below,

Click on the image



12.2 Navigation Menu

When ‘**Navigation**’ was selected from an employee page, the top section will display the employee’s name and number that you are currently viewing.

The available actions that can be performed from the employee navigation menu will now be discussed.

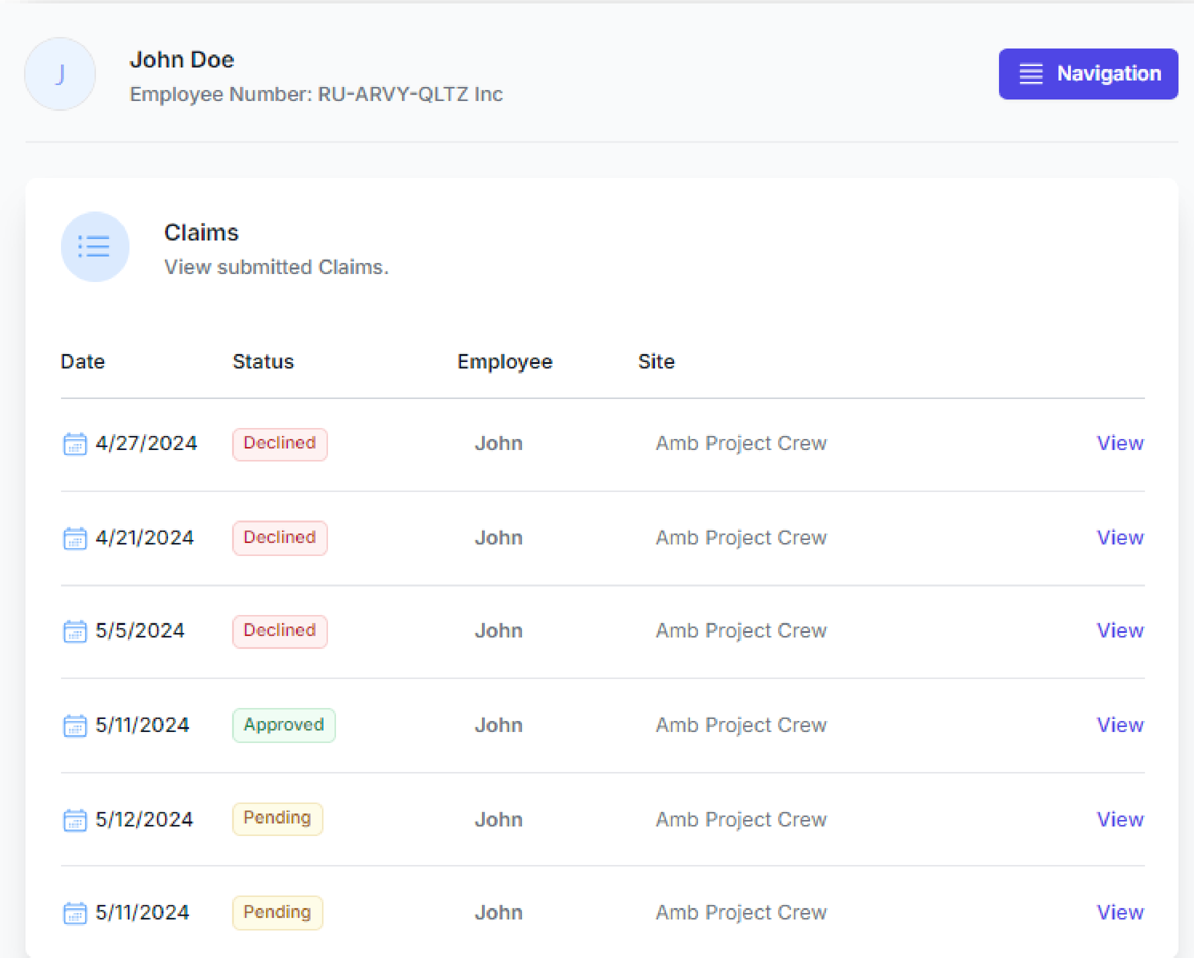
12.3 Employee Overview

Overview is the first selection available to you as the approver or manager to who the employee was assigned. This page presents more information of the employee you are viewing, as described in this chapter under point 12.1.
To review the listed information, click here.

12.4 Employee Claims

Claims, if selected from the Navigation menu, will redirect you to the employee's claims.

All claims listed here, will be claims submitted by the single employee you are viewing.



All of this employee's claims will be listed, including; declined, approved and pending claims.

The 'View' option next to each claim, will open the submitted claim on a new browser window.

Approved, and declined claims can only be viewed.

Pending claim submissions, can be reviewed, declined or approved.

The steps to process employee claims, was discussed in chapter 4.

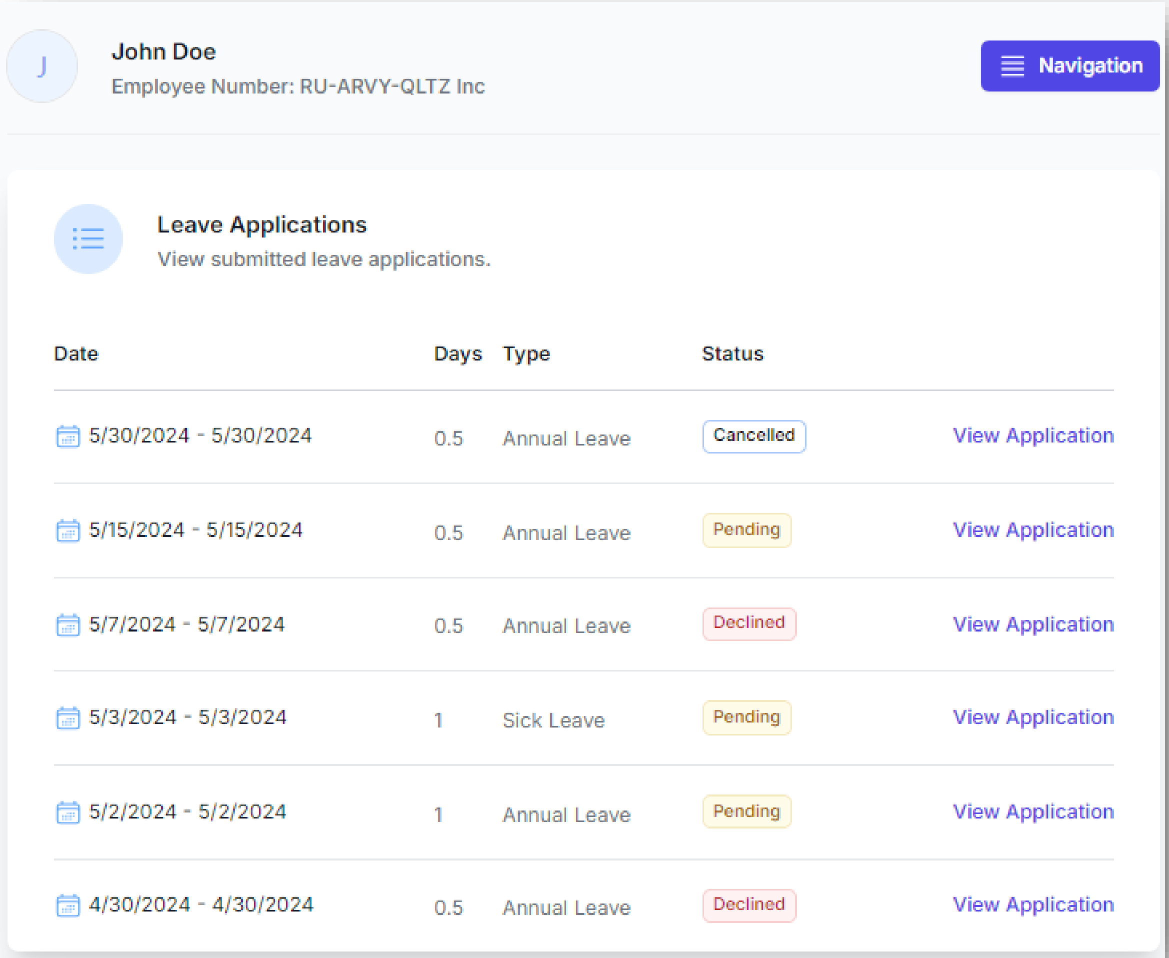
***To review the steps,* click** [here].

↖ Navigation Menu

12.5 Employee Leave

Leave, if selected from the Navigation menu, will redirect you to the employee's leave applications.

All the leave listed here, will be leave applications submitted by the single employee you are viewing.



All of this employee's leave applications will be listed, including; cancelled, declined, approved and pending leave.

The 'View Application' option next to each request for leave, will open the submitted leave application on a new browser window.

Approved, declined and cancelled leave, can only be viewed.

Pending leave applications, can be reviewed, declined or approved.

The steps to process employee leave applications, was discussed in chapter 4.

To review the steps, click here.

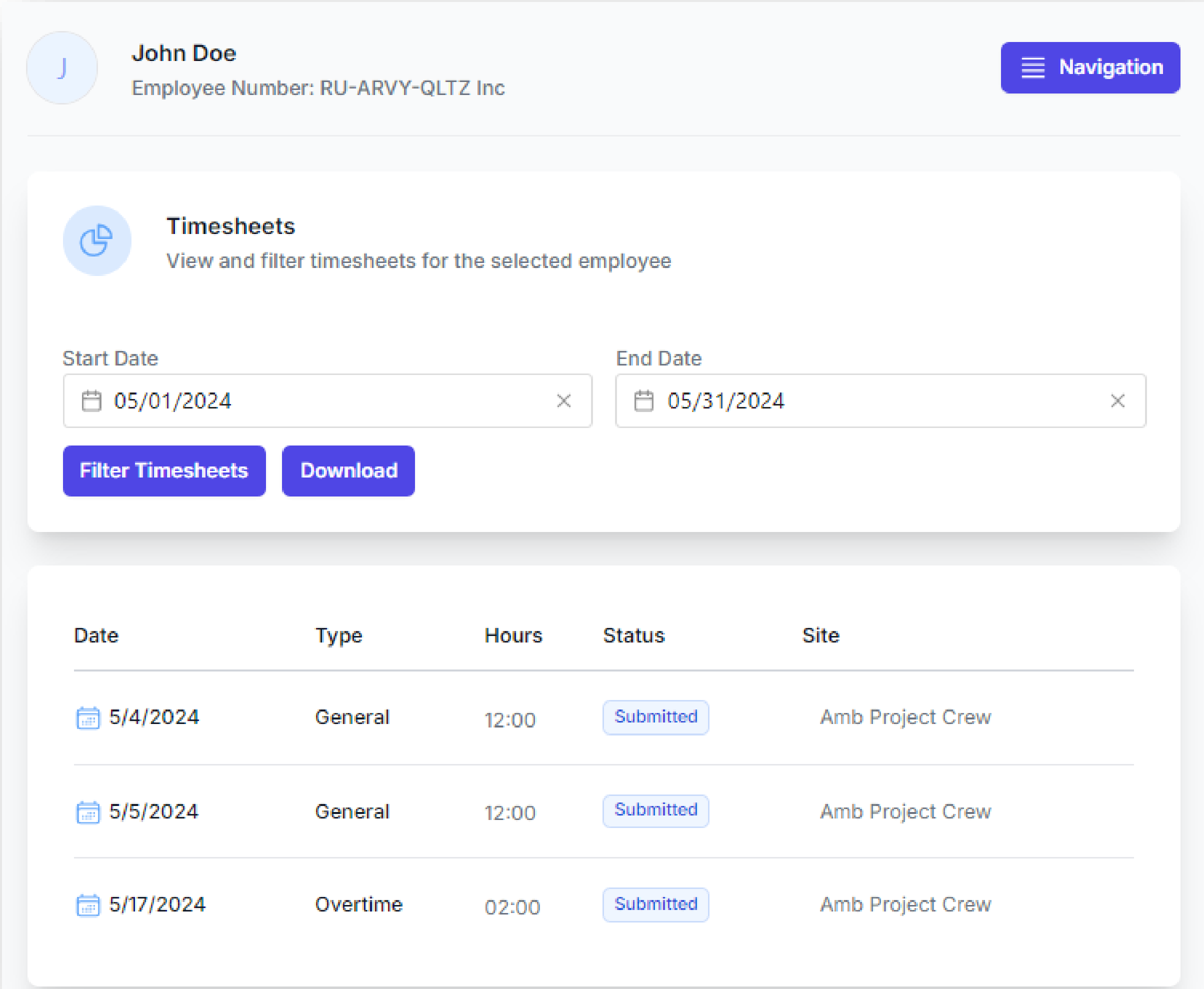
↖ Navigation Menu

12.6 Employee Timesheets

Timesheets selected from the Navigation menu, will redirect you to the employee's timesheets.

All timesheets listed here, will be timesheets submitted by the single employee you are viewing.

*** From the page, employee timesheets cannot be processed.***



Actions allowed from this page:

Timesheets listed here, will be for the current calendar month. You have two options when an employee's timesheets are viewed:

Option 1: **Filter Timesheets**, by adding the Start and End day for the period you want to view, then click on the 'Filter Timesheets' button. Filter Timesheets

Result: Only the timesheets that falls part of the specified period will now be displayed.

Option 2: Download, if selected will download all the timesheets for the specified period.

Result: The downloaded file will be send to your email address, once generated from the system.

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

From the employee's timesheet page, not only can the timesheets be viewed, but also other type of submission.

Date	Type	Hours	Status	Site
5/1/2024	General	12:00	Submitted	Amb Project Crew
5/2/2024	General	12:00	Submitted	Amb Project Crew
5/3/2024	General	12:00	Submitted	Amb Project Crew
5/6/2024	General	12:00	Submitted	Amb Project Crew
5/7/2024	General	12:00	Submitted	Amb Project Crew
5/8/2024	General	12:00	Submitted	Amb Project Crew
5/9/2024	General	12:00	Submitted	Amb Project Crew
5/3/2024	Overtime	01:00	Pending	Amb Project Crew
5/10/2024	General	06:17	Pending	Amb Project Crew
5/5/2024	Overtime	04:25	Submitted	Amb Project Crew

For each submitted application or request, the date, type, hours, status and site will be displayed.

Note, that type; 'General' refers to timesheets submitted for a period, either separately, or by making use of the 'Bulk' submission available to process period timesheets.

The steps to process employee timesheets for a payroll period, was discussed in chapter 4.

To review the steps, click here.

Navigation Menu

12.7 Employee Period Submissions

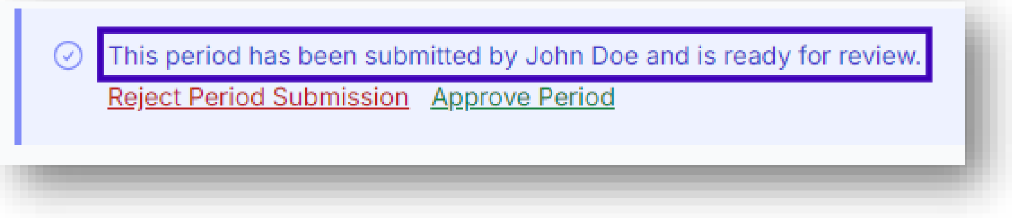
Period Submission, selected from the 'Navigation' menu, will redirect you to the employee's period submission.

All submissions listed here, will be the submitted applications or requests of the single employee you are viewing.

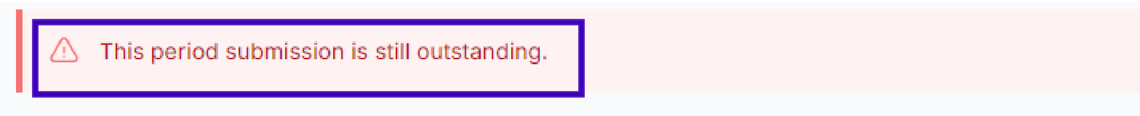
The following can be viewed and actioned from the employee period submission page:

One of the most important, and informative sections, is the **status of the period**.

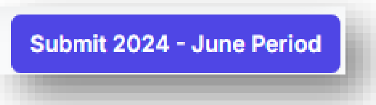
If all applications and requests was submitted by the employee, as a completed period submission, the following will be displayed:



In the case that an employee might have submitted timesheets, claims, overtime or leave, yet did not finalise the overall period as a complete period submission, the following will be displayed:



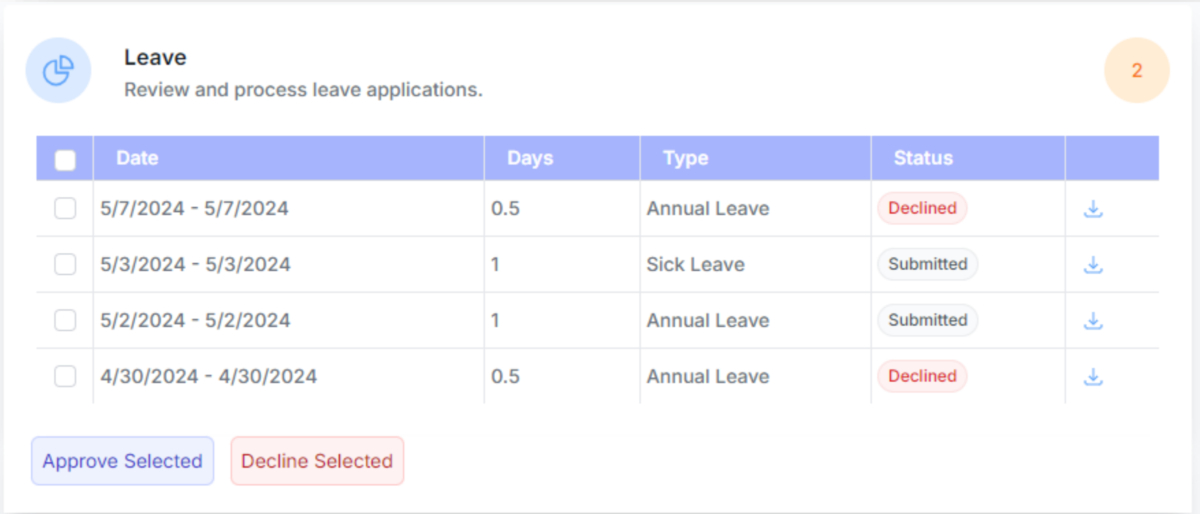
The importance of submitting a period, can't be stressed enough. When the 'Submit' button is selected, it serves as the employee's final confirmation that all their required submissions and documents for this period was provided, correct and can be processed. In other words, the employee does not have any other, claims, overtime, leave or timesheets that still needs to be submitted for this payroll period, and hence the period is send for approval as the final step by the employee.



This action can be seen as the closing of a period, by the employees final acknowledgement that the period is up to date, complete and no outstanding submissions left. Once a period is pending approval, timesheets, claims and overtime is locked for the submitted payroll period.

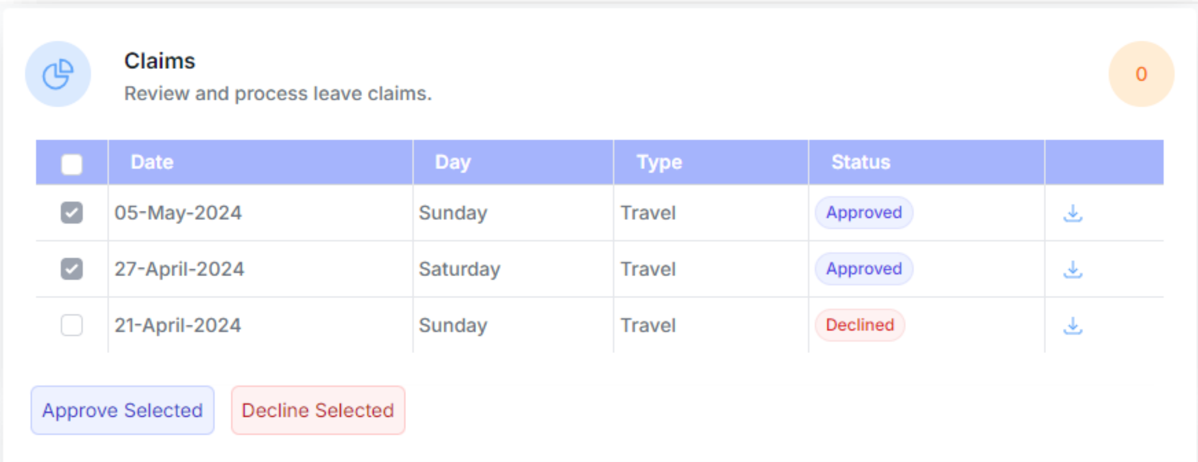
From the navigation menu, when ‘Period Submissions’ was selected, the following employee submission can be viewed and processed**:**

The **Leave** section, will display all the leave applications of an employee for the selected period being viewed.



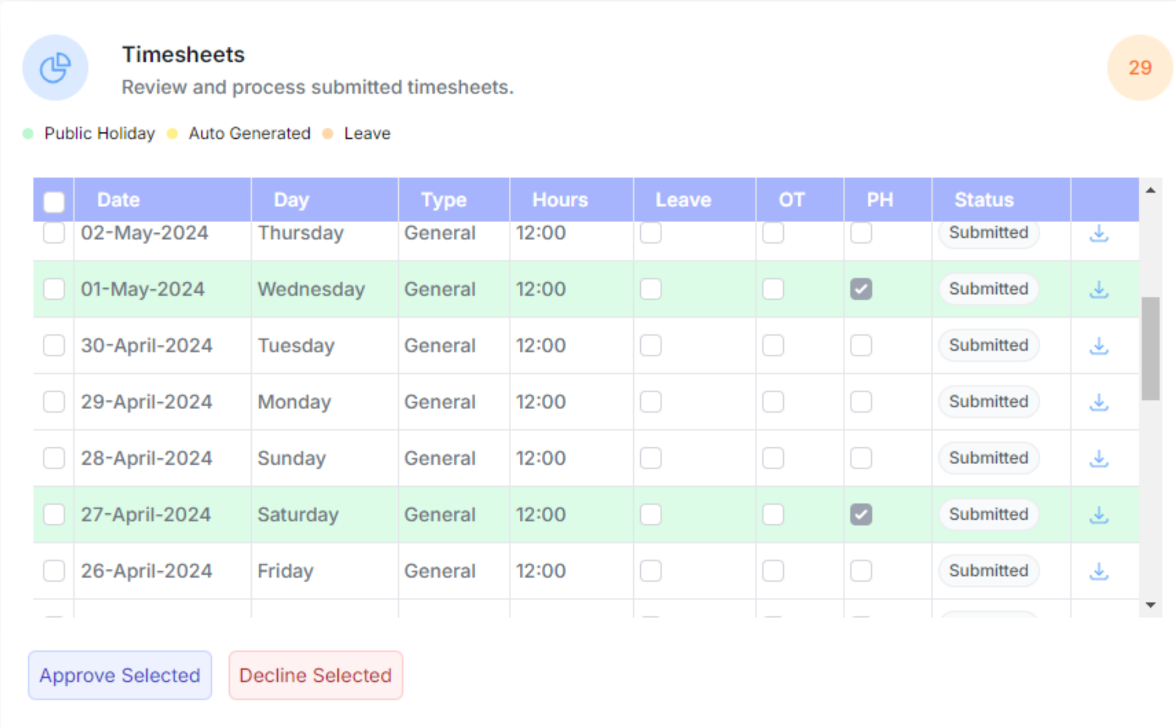
Leave application can be viewed by clicking on the ‘download’ icon or, it can be processed by selecting leave from the list, and then one of the two options; Approve or Decline.

The **Claims** section, will display all the claims submitted by the employee for the selected period that is viewed.



Claims submitted can be viewed by clicking on the ‘download’ icon. After the claim was reviewed, it can be processed by selecting the claim from the list, and then one of the two options; Approve or Decline.

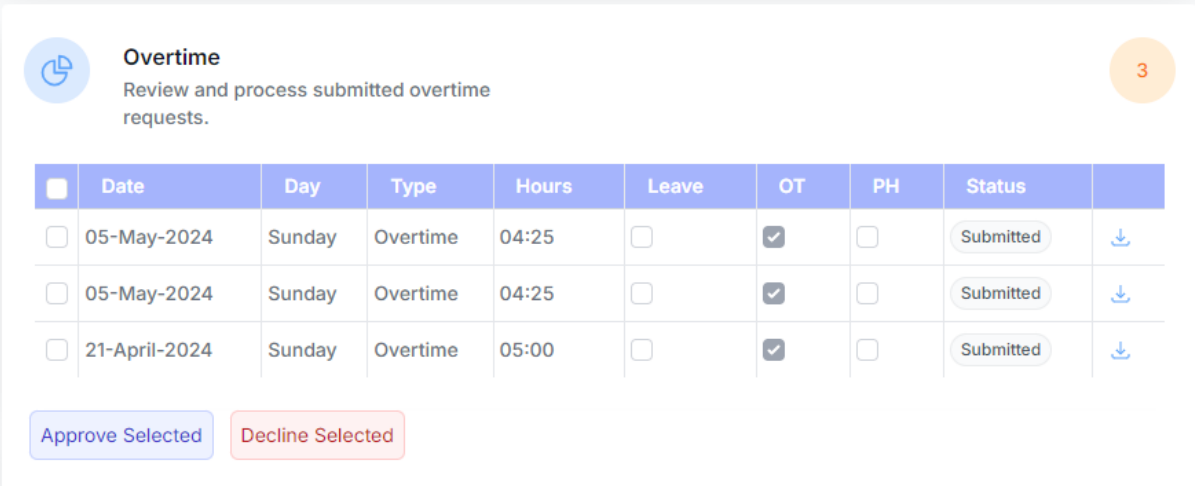
Timesheets, will display all the timesheets submitted by the employee for the selected period that is viewed.



	Date	Day	Type	Hours	Leave	OT	PH	Status	
☐	02-May-2024	Thursday	General	12:00	☐	☐	☐	Submitted	
☐	01-May-2024	Wednesday	General	12:00	☐	☐	☑	Submitted	
☐	30-April-2024	Tuesday	General	12:00	☐	☐	☐	Submitted	
☐	29-April-2024	Monday	General	12:00	☐	☐	☐	Submitted	
☐	28-April-2024	Sunday	General	12:00	☐	☐	☐	Submitted	
☐	27-April-2024	Saturday	General	12:00	☐	☐	☑	Submitted	
☐	26-April-2024	Friday	General	12:00	☐	☐	☐	Submitted	

Timesheets can be processed by selecting all, or a timesheet from the list, and then one of the two options; Approve or Decline. Timesheets can also be viewed by clicking on the 'download' icon.

Overtime, as the last period submission section, will display all the overtime requests submitted by the employee for the selected period that is viewed.



	Date	Day	Type	Hours	Leave	OT	PH	Status	
☐	05-May-2024	Sunday	Overtime	04:25	☐	☑	☐	Submitted	
☐	05-May-2024	Sunday	Overtime	04:25	☐	☑	☐	Submitted	
☐	21-April-2024	Sunday	Overtime	05:00	☐	☑	☐	Submitted	

It is an essential step to review each submitted overtime before it approved or declined. After the overtime was reviewed, it can be processed by selecting the overtime, and then one of the two options; Approve or Decline.

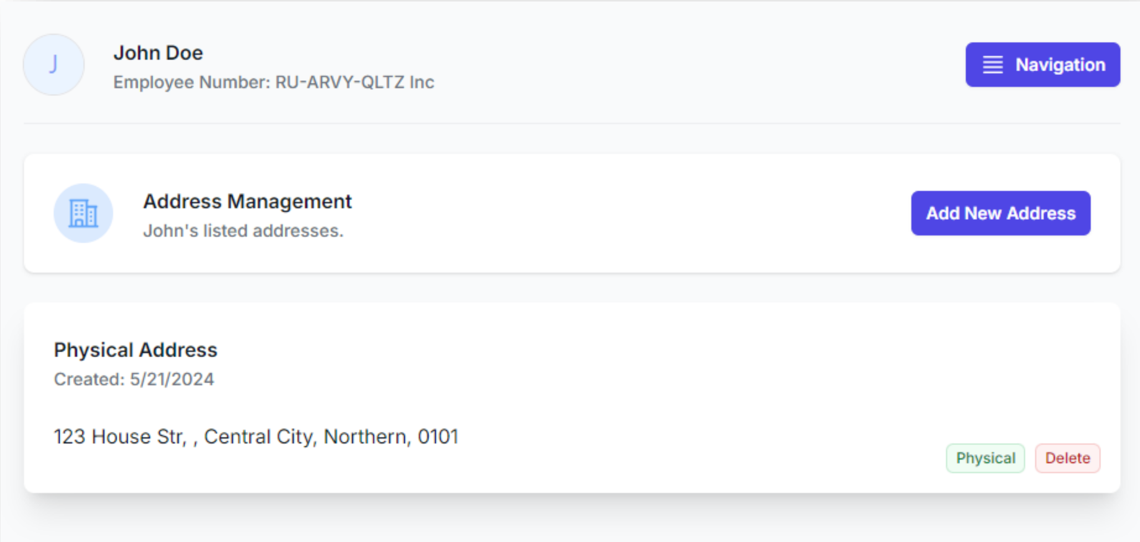
The steps to follow when processing an employee's period submission,was discussed in chapter 4.

To review the steps, click [here]

Navigation Menu

12.8 Employee Addresses

When **Addresses** is selected from the navigation menu, a list off all the addresses associated to the employee will be listed.



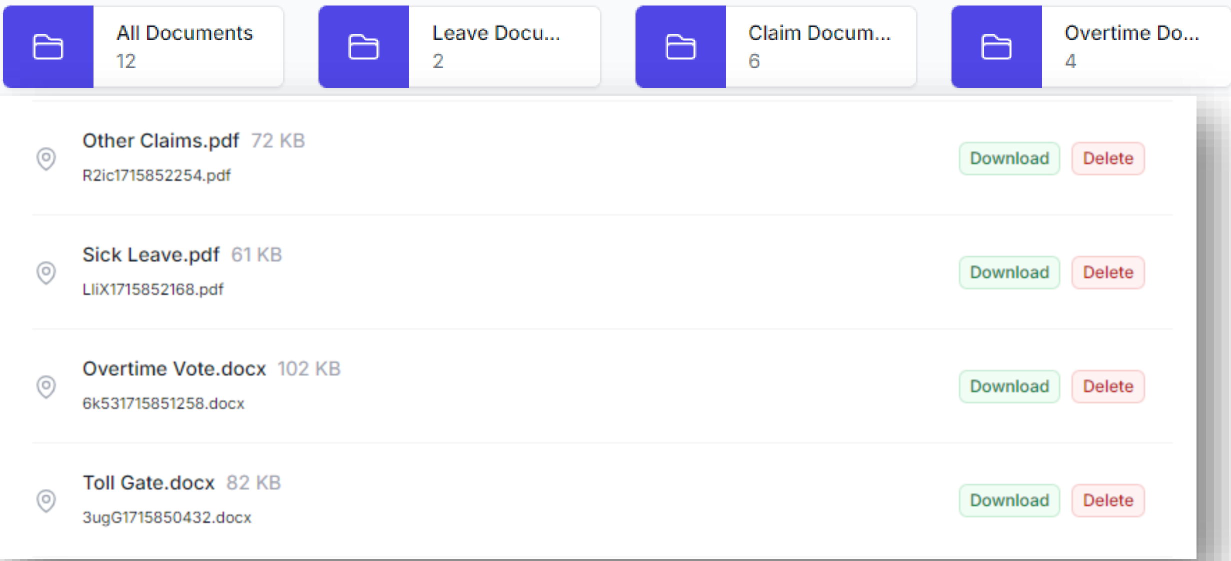
Employee addresses can by updated by either the employee, or user who has the authority to access and view the employee profile,

The following types of addresses can be updated on the system:

- Physical Address
- Postal Address
- Delivery Address

12.9 Employee Documents

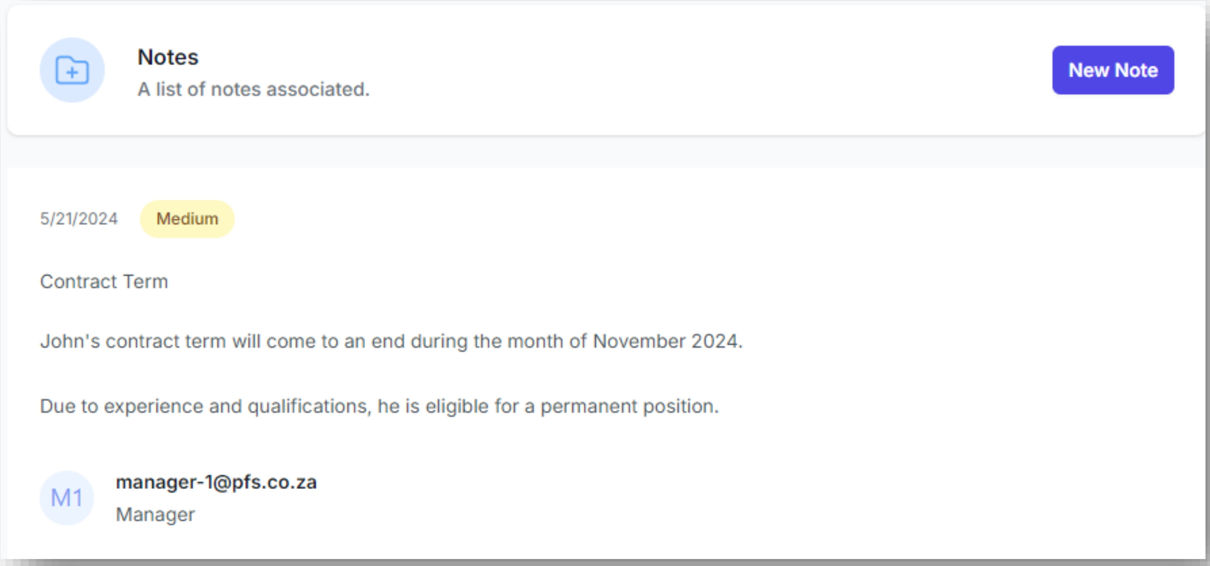
When Documents was selected from the navigation menu, all documents associated with the employee, including documents uploaded by the employee will be categorized and listed.



Documents submitted with period submissions, will also be added and available from the employee's documents page.

12.10 Employee Notes

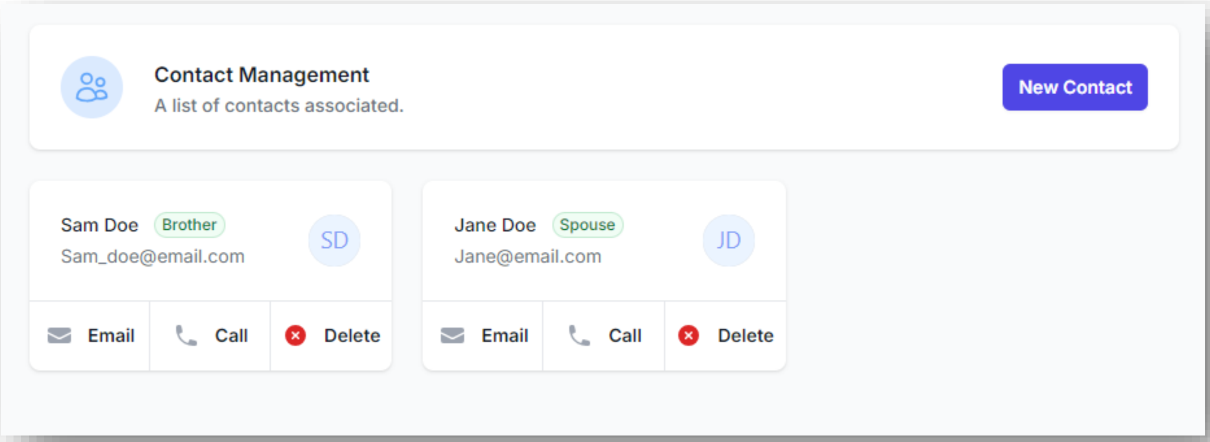
The **Notes** page will display any notes added on the system regarding the employee that you are currently viewing.



The date it was added, level of importance, title, the note, and the user who added the note can be viewed.

12.11 Employee Contacts

Contacts listed on this page, will be the employees preferred and provided contacts that may be contacted in the case of any communication or notices regarding the employee.



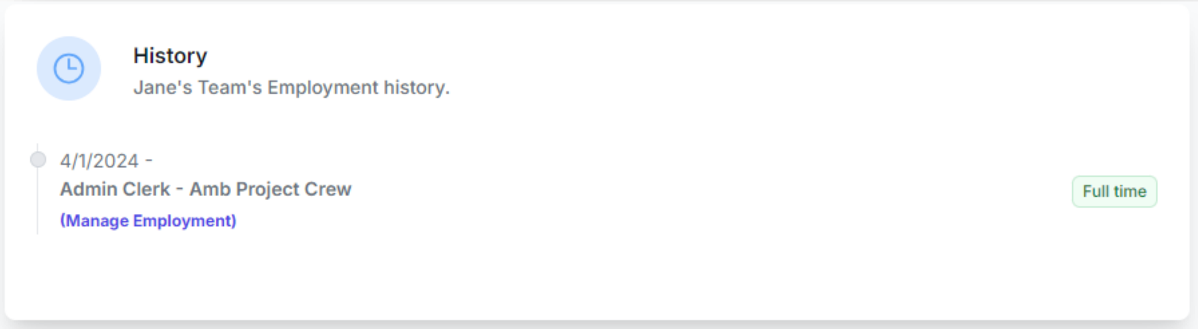
Contact information that can be viewed, includes the contacts name and surname, their relationship with the employee, and email address

Employees has the ability to add or delete contacts from their profile.

↖ Navigation Menu

12.12 Employee History

Employee **History**, will display the employee's history of employment with Capital PFS.



Employment history that can be viewed includes, date of employment, occupation, site, and status of employment.

The history is recorded since the time that the employee was added, and employed from the system. Past employment history is not available from the system.

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13. 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 to 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 individuals.

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