

## 12R8 Enterprise Timecard Image Linking


During the **Time Entry** process timecard images can be linked to the *Transactions*. These images will then either be included with the **Emailed Invoice** or print out with the **Invoice** during the **Invoice** run process. Timecard image linking can be used in conjunction with the Email Document Distribution System (EDDS/Invoice Emailing) or as its own module for printed **Invoices**. The first step is to set up the **Customer** record for timecard image linking. From the **Customer** select **Invoicing** and then the *Billing Setup* form.

The screenshot shows the 'Billing Setup' form for a customer named 'Creative Solutions'. The form is divided into several sections:

- Customer Information:** Primary, 123 Main St, Eagan, MN 55121, (651) 555-1212 x123.
- billing schedule:** Includes checkboxes for 'Bill customer daily' and 'Bill monthly?', and a 'Bill On...' dropdown menu.
- invoicing:**
  - Style: Invoice
  - Count: 1
  - Invoice Method: Print and Email with Timecard Image
  - Email Template: Invoice to Contact
  - Currency: USD
  - Invoice Handling: (empty)
  - Max Invoice: (empty)
- Create Separate Invoices For Each:** A grid of checkboxes for various categories: Department, Branch, Order, Worksite, Assignment, Supervisor, Employee Id, Job Title, Week End, Sub-entity, Cost Center, Division, PO, and Department Address.
- Invoice Recipients:** A table with columns for Name, Title, Contact Method, and Details. One recipient is listed: Hampton, Irv, Supervisor, Email, emailtestrecipient@gmail.com.
- Invoice Line Items:** A section with a 'No Records Found' message.

In the *Invoice Method* field select "Print with Timecard Image", "Print and Email with Timecard Image", or "Email with Timecard Image".

\*Note – The "Email" options should only be selected if your company has purchased the Email Document Distribution System (EDDS/Invoice Emailing) module.

From **Pay/Bill** select the **Time Entry** form. Then use the *Actions* drop down and select *Link Timecard Images* from the *Form Actions* or click on the  button in the upper right.

The screenshot shows the 'Actions' dropdown menu for the 'Pay/Bill' form. The menu is open, displaying several options:

- Proof My Timecards
- Proof Timecards
- Create Webcenter Proofing Session
- Create Timecards
- Link Timecard Images (highlighted with a red circle)

The menu is divided into two sections: 'Record Actions' and 'Form Actions'. The 'Link Timecard Images' option is located in the 'Form Actions' section.


This will open the timecard image linking functionality as shown below:

31 timecards

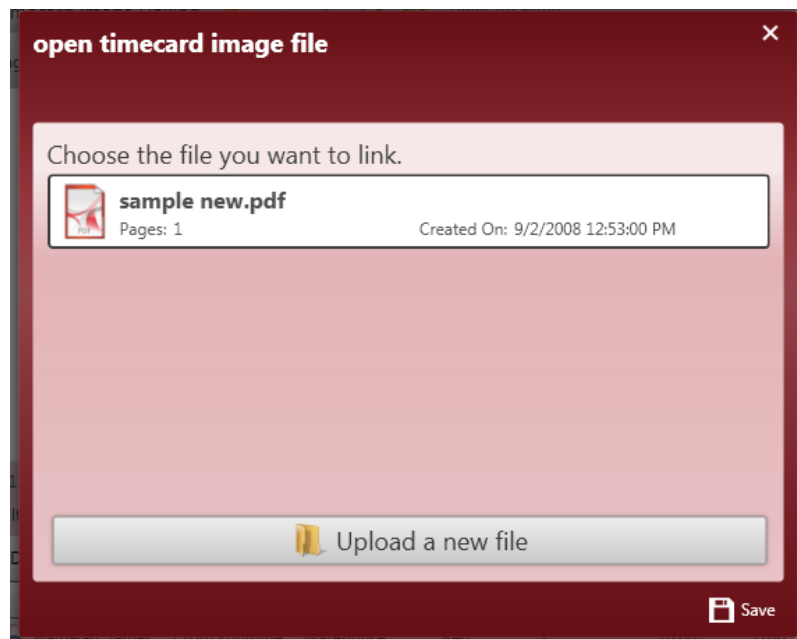
Filter Employee Name Starts With Filter Text View Standard View Show only unused timecards

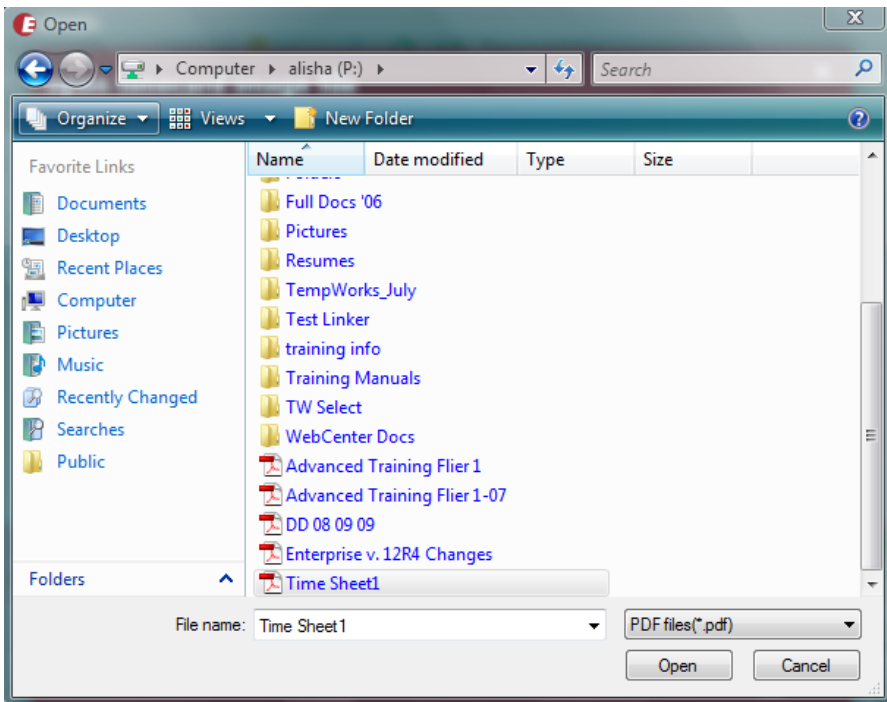
Drag a column header here to group by that column.

Name	Customer	Department	Pay C...	Shift	RT Hrs	OT Hrs	Bill	Pay	WE D...
Hamelau, James...	Crom Equipme...	Warehouse	Reg	1	0.00	0.00	\$0.00	\$0.00	9/20/2009
Hamelau, James...	Crom Equipme...	Warehouse	Reg	1	0.00	0.00	\$20.38	\$14.25	9/20/2009
Hanes, Tom Lau...	Creative Soluti...	Finance	Reg	1	40.00	0.00	\$15.33	\$10.00	9/20/2009

To upload timecard images click on the  button at the top of the screen.

From the *Open Timecard Image File* form select the document and click *Save*. If the document that you want to link is not in the list, click on *Upload A New File* at the bottom of the form.





Find where the document is stored and then select it from the list. Once it's highlighted click *Open* to upload it to Enterprise.

A screenshot of the 'Hamelau, James Georg' software interface. The top navigation bar includes icons for Employee, Customer, Order, Assignment, Contact, Pay / Bill, Calendar, Reports, and Email. A green button labeled 'Link Image' is circled in red. Below the navigation bar, there is a 'Timecard Image Linking' section with a search bar and a table of employee information. The table includes columns for Employee Name, Title, Employee Number, Status, Department, and Supervisor. Below this is a table of timecard transactions with columns for Date, Start Time, End Time, Regular Hours, Overtime Hours, and Total Hours. At the bottom, there is a 'tasks' sidebar and a '31 timecards' list with columns for Name, Customer, Department, Pay C..., Shift, RT Hrs, OT Hrs, Bill, Pay, and WE D...

EMPLOYEE NAME: JAMES HAMELAU	TITLE: GENERAL WAREHOUSE
EMPLOYEE NUMBER: 12036	STATUS: N/A
DEPARTMENT: WAREHOUSE	SUPERVISOR: HIGGINS








DATE	START TIME	END TIME	REGULAR HOURS	OVERTIME HOURS	TOTAL HOURS
9/14/2009	8 am	4:30 pm	8		8
9/15/2009	8 am	4:30 pm	8		8
9/16/2009	8 am	4:30 pm	8		8

Name	Customer	Department	Pay C...	Shift	RT Hrs	OT Hrs	Bill	Pay	WE D...
Hamelau, James...	Crom Equipme...	Warehouse	Reg	1	10.00	0.00	\$20.00	\$13.99	9/20/2009
Hamelau, James...	Crom Equipme...	Warehouse	Reg	1	40.00	8.00	\$14.30	\$10.00	9/20/2009
Hamelau, James...	Crom Equipme...	Warehouse	Reg	1	0.00	0.00	\$20.38	\$14.25	9/20/2009


The document viewer will now display the selected or uploaded document(s). Select the timecard *Transaction* from the list that the image should be linked to and then click on the *Link Image* button in the upper left (as circled) or hit *Alt-I* on your keyboard.




Once the image has been linked it will display the document name, number of pages, and the *Total Hours* for the timecard. Click on the *Unlink Image* button or *Alt-u* on your keyboard to remove this timecard image from the *Transaction*.

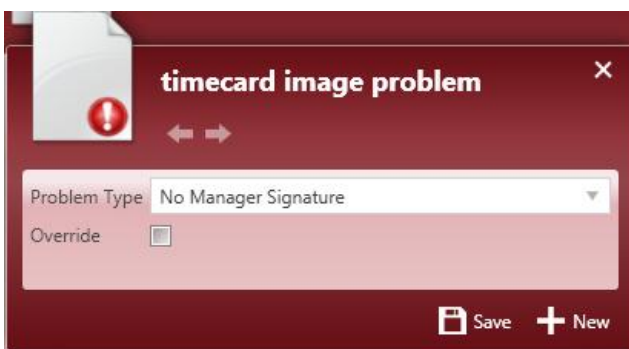
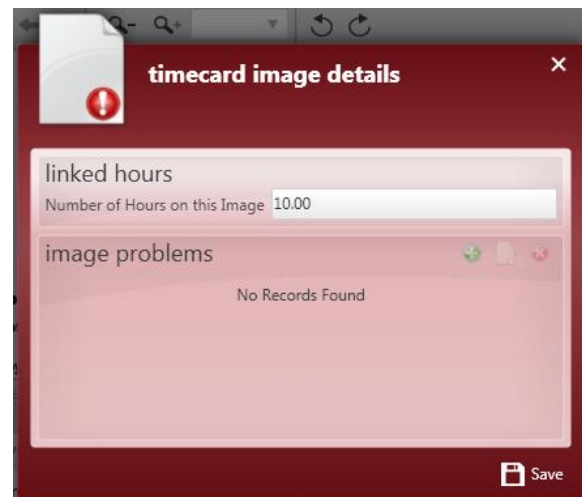
There are several other functions that can be used in the timecard image linking view. To scan in a timecard, click on the  button at the top of the screen. The  button allows the user to view the timecard in large screen mode (works well with widescreen or dual-monitor systems) so that the full timecard image can be displayed as well as the full timecard spreadsheet. Clicking on the  button turns on the auto-paging function. If timecards are listed in the same order as the **Time Entry** spreadsheet, the image will automatically display the next timecard image of the series once *Link Image* has been clicked for the previous *Transaction*. The  button zooms out on the image, while the  zooms in. Clicking on the  button rotates the image 90° counter-clockwise, with the  button rotating it 90° clockwise.



The  button turns on toggle verify mode. The form to the left will open and will be auto-populated with the total number of hours that were entered for this *Transaction*. If this amount is not the correct *Number of Hours* for the timecard image, the number should be updated. Then click *Save* to close the form.

To report an error with the timecard image (missing signature, incorrect number of hours, etc.), double-click on the image file (listed under the *Link* or *Unlink Image* button).

The form to the right will open and list the *Number of Hours on this Image*. Click on the  button to proceed to the next step of image error reporting.

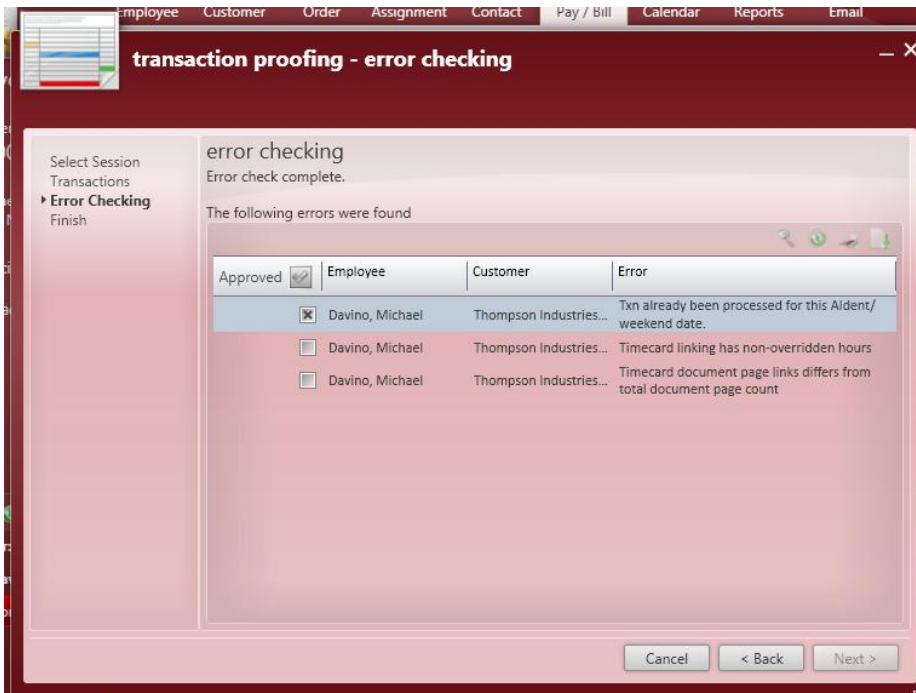
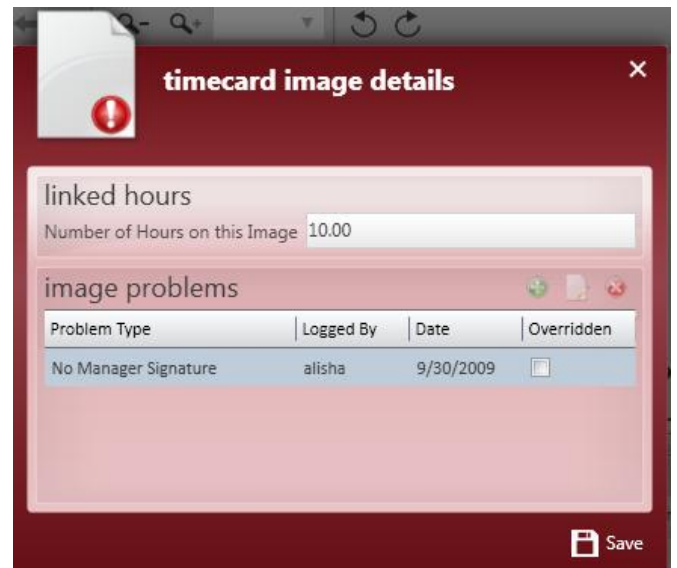


Select the issue from the *Problem Type* drop down menu. The *Override* check box can be used to ignore this error at this point or to approve the error during the **Proofing** process. Click on *Save* to close the form or *New* to save and clear the form so that another issue can be added.

Once all of the timecard image issues have been added click on the *Save* button in the lower right of the *Timecard Image Details* form.



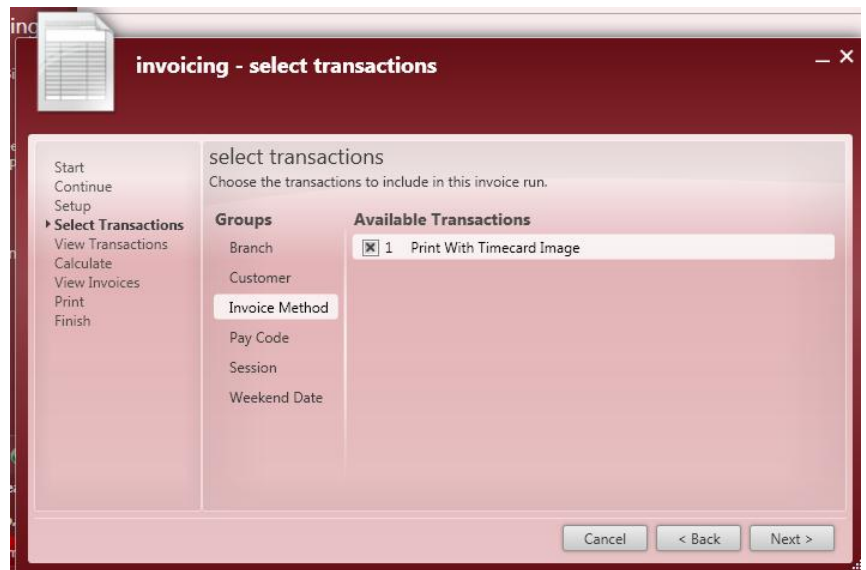
\*Note - When a timecard image error is reported the hours indicator for the timecard image file turns red.




During the **Proofing** process for the session, any timecard image errors will be listed. To view the *Transaction*, right-click on the error line and select *View Timesheet*. Follow the steps above to view the image and override timecard errors if needed. Once errors have been corrected or approved continue with the **Proofing** process and close the session.

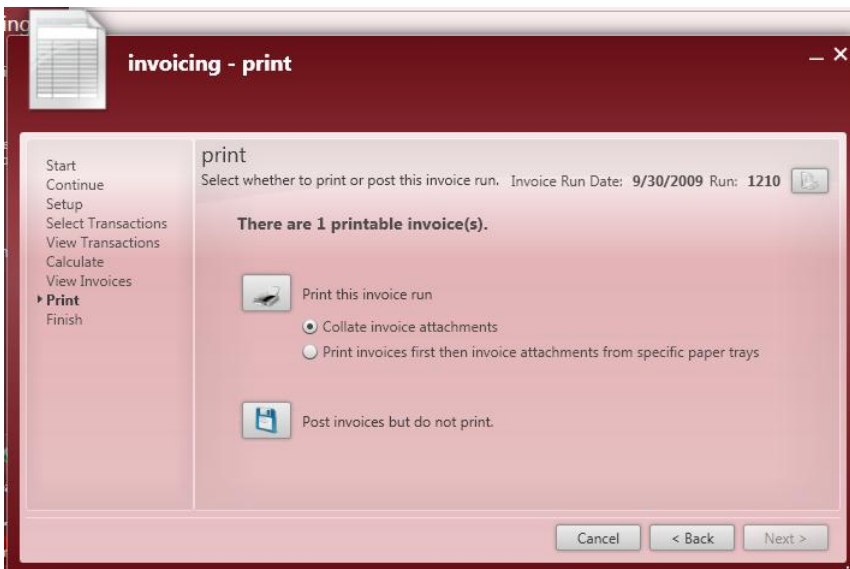
Once the *Transactions* have been **Proofed**, they can be included in a **Payroll** or **Invoice** run. As timecard image linking does not affect **Employee Paychecks**, the **Payroll** process will be unchanged. Changes to the **Invoice** run process are covered next.

Continue with the usual **Invoicing** process. When selecting the *Transactions* to include in the run, viewing them by *Invoice Method* will allow the user to view and/or select *Transactions* that will be printed with the timecard images.




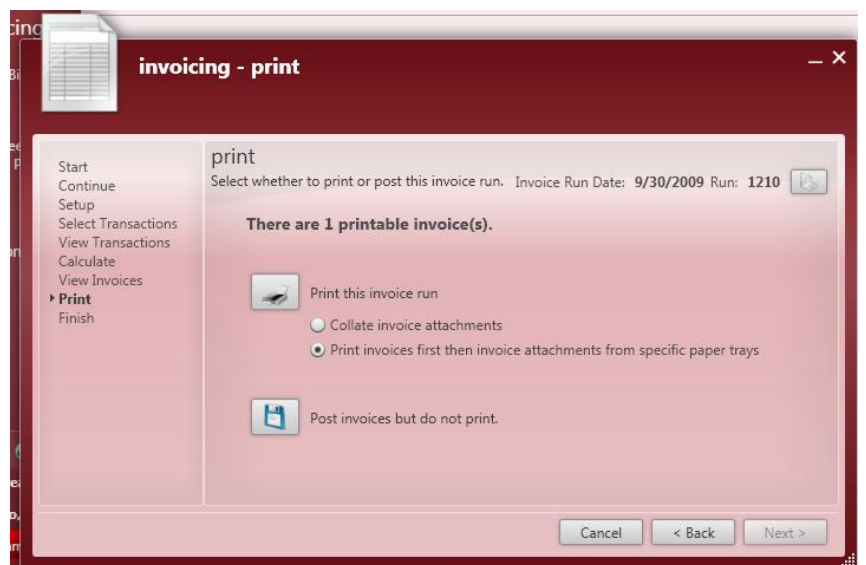
Once the **Invoice** process has reached the **Print** form there are two selections for printing.

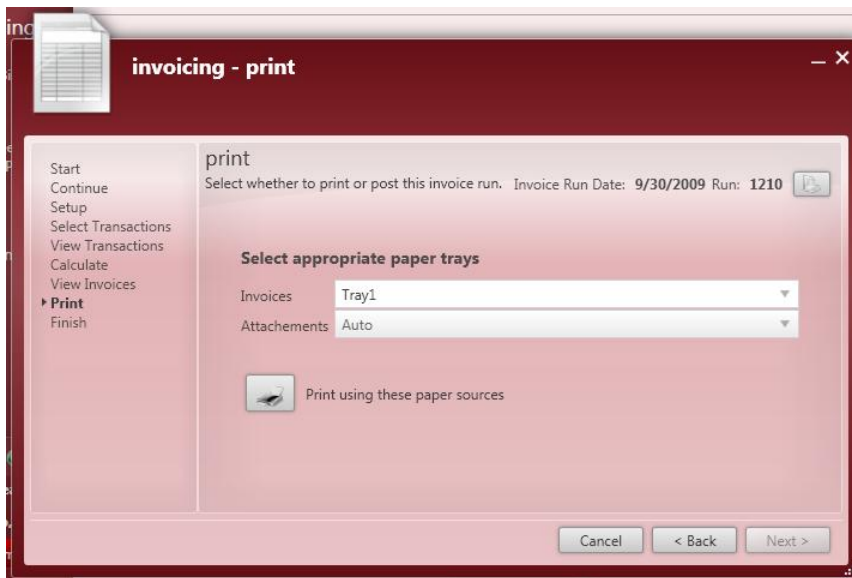
1) Select *Collate Invoice Attachments* if the **Invoices** and timecard images should all be printed from the paper in one printer tray. Then click on the  button to choose the printer and print the **Invoices** with the timecard images.




2) Select *Print Invoices First Then Invoice Attachments From Specific Paper Trays* if the **Invoices** and timecard images should be printed on paper from different printer trays.

Then click on the  button to choose the printer the **Invoices** will be sent to.





After the printer has been selected the second step for option 2 is to choose the paper trays that will be used. Select the tray options from the *Invoices* and *Attachments* drop down menus.

Then click the  button to print the **Invoices** and timecard images to the selected printer trays.

Once the printing is complete the **Invoice** run will continue to the selections for *Post* or *Reprint* per the normal **Invoice** process.

#### Still Have Questions?

For more information about timecard image linking contact our customer support group at 651-452-0366 or by sending an email to [support@tempworks.com](mailto:support@tempworks.com).

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact Alisha Arnold (Corporate Trainer) at 651-287-8370 or by sending an email to [Alisha@tempworks.com](mailto:Alisha@tempworks.com).