IMS PAYROLL

online max

IMS Online Max

Manager
user guide

POWERED BY

TimeFiler

www.timefiler.com

Table of Contents

Logging into IMS Online Max 3
Web address 3
Login details 3
Changing your password 3
IMS Online Max screens 4
Timesheets 5
Create a Timesheet 6
Navigating the Timesheet 8
Action Buttons 8
Field Definitions 9
Entering Timesheets on behalf of employees 12
Time Entries 12
Leave Taken 13
Approving Employees' Timesheets 15
Un-submitting Employees' Timesheets 17
Viewing Historical Timesheets 18
Print Timesheets 19
Timesheet Summary 20
Reports 22
Report Output Options 22
Viewing reports on-screen 22
Saving reports 22
Timesheet Reports 24
Timesheet Notes 24
Timesheet Status 25
Payment Reports 27
Payment Summary – fortnight 27
Variable rosters 28
Roster tab page 28
Editing variable rosters 28
Enter a one-off roster change 30
General Information 31
Alerts & warnings 31
Warnings Definitions 31
Logging out of IMS Online Max 32

© Enfinit Software Ltd 2010. All rights reserved.

Logging into IMS Online Max

Web address

Your Payroll Administrator will advise the web address for logging into IMS Online Max.

You can log into IMS Online Max from anywhere where there is an internet connection.

Login details

Your login name is your IMS Payroll employee number.

The first time you log into IMS Online Max, your password is your IRD Number (e.g. 012-345-678 is entered as 012345678). If you don't know your IRD Number, please contact your Payroll department.

After you have successfully logged in for the first time, you will be prompted to change your password. Make sure the password is secure, and remember, it is case-sensitive.

If you forget your password, please contact your Payroll department so that it can be reset.

You have nine opportunities to enter a password before you will be locked out of the system.

Changing your password

You can change your password at any time when logged into IMS Online Max.

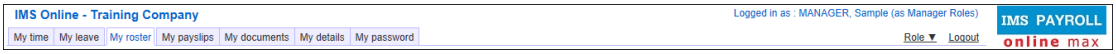
Click on the 'My Password' tab page, and enter new password details:

Field	Explanation
Current password	• Enter current password (case-sensitive)
New password	• Enter a new password that will apply from next login into IMS Online Max. • Ensure it is secure.
Confirm password	• Re-enter your new password.

Click **Save**.

© Enfinit Software Ltd 2010. All rights reserved.

IMS Online Max screens



The following tab pages are available in IMS Online Max:

- My time
  - *Enter, approve and un-submit timesheets for your employees*
  - *View potential timesheet payments*
  - *Check the status of Timesheets (submitted, not submitted, approved, unsubmitted)*
  - *View historical timesheets*
  - *Run reports*
- My leave
  - *Enter leave on behalf of your employees*
  - *Approve or decline employees' leave requests*
  - *View past, current and future Leave Requests for your team*
  - *Check the status of Leave Requests (submitted, not submitted, approved, not approved)*
  - *View scheduled days of work*
  - *View actual leave history payments*
- My roster
  - *View your employees' rosters*
- My payslips
  - *View your own payslips online*
- My documents
  - *View documents online (for example, company policies, newsletters etc)*
- My details
  - *Review your personal payroll details*
  - *Notify Payroll department if changes are required*
- My password
  - *Change password details*

Please refer to Manager Guide (IMS Online Express) for instructions on how to navigate My leave / My payslips / My documents / My details / My password.

Please refer to INSERT LINK TO MAX EMPLOYEE GUIDE for instructions on how to enter and submit your own timesheets to your manager.

© Enfinit Software Ltd 2010. All rights reserved.

Timesheets

The following functionality is available for managers on the **My Time** tab page:

- Create a timesheet
    - *generally this function isn't necessary as most organisations have their payroll department create all employees' timesheets at the beginning of each pay period*
- Enter timesheets on behalf of your employees
- Approve employees' timesheets
- Un-submit employees' timesheets
- Check the status of timesheets (submitted, unsubmitted, approved)
- View your employees' historical timesheets
- Run various timesheet and payments reports

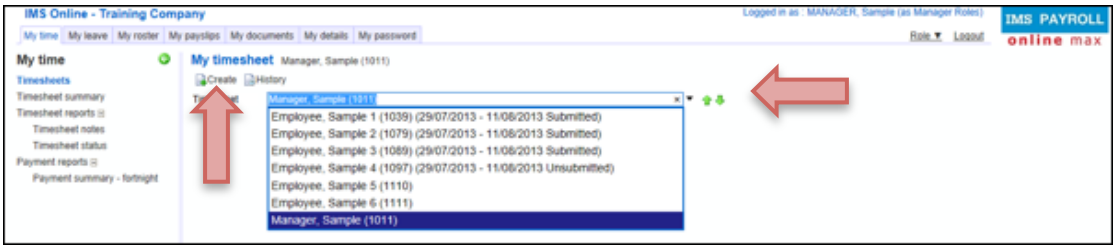
© Enfinit Software Ltd 2010. All rights reserved.

Create a Timesheet

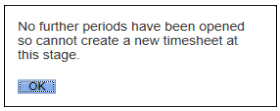
In most organisations, timesheets are created by the Payroll department. If they are not, managers are able to create timesheets for their employees.

On the **My time** tab page, select the applicable employee from the drop down box.

Click **Create**.

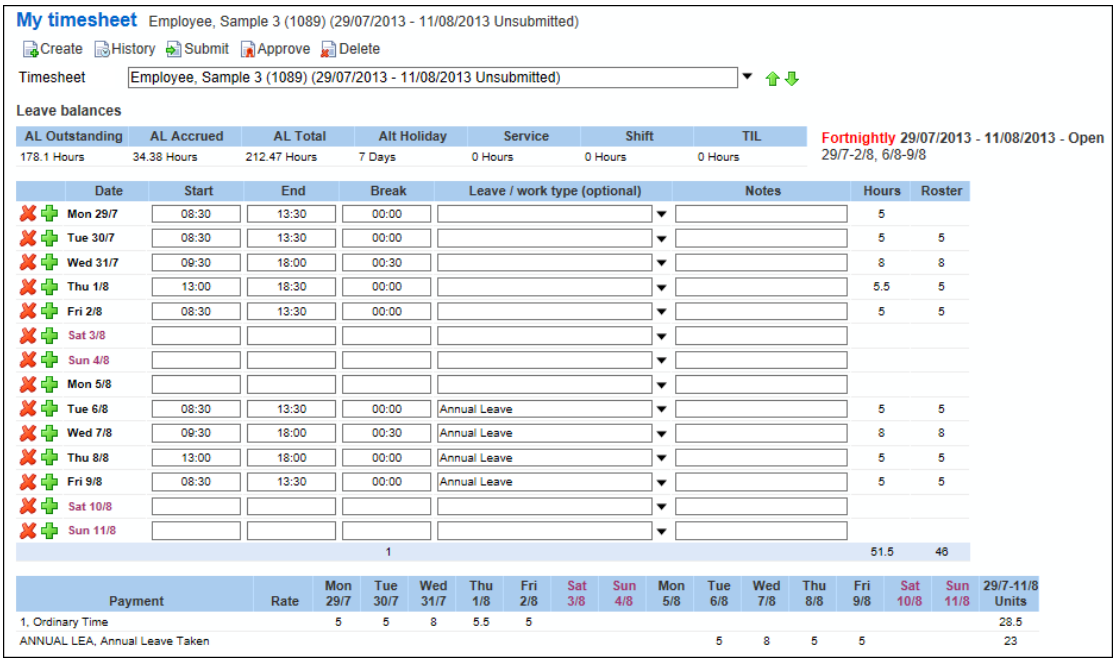


You will only be able to create timesheets for pay periods that are open. Pay periods are opened by your Payroll Administrator. If this message appears you need to wait until the pay period is opened.



A new editable timesheet for the current pay period will display on-screen. Each day will be populated with the employee's rostered hours. Any leave that has been previously entered into the Leave Planner will be automatically populated against the appropriate day.

© Enfinit Software Ltd 2010. All rights reserved.



My timesheet Employee, Sample 3 (1089) (29/07/2013 - 11/08/2013 Unsubmitted)

Create History Submit Approve Delete

Timesheet: Employee, Sample 3 (1089) (29/07/2013 - 11/08/2013 Unsubmitted)

Leave balances

AL Outstanding	AL Accrued	AL Total	Alt Holiday	Service	Shift	TIL
178.1 Hours	34.38 Hours	212.47 Hours	7 Days	0 Hours	0 Hours	0 Hours

Fortnightly 29/07/2013 - 11/08/2013 - Open
29/7-2/8, 6/8-9/8

Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
Mon 29/7	08:30	13:30	00:00			5	
Tue 30/7	08:30	13:30	00:00			5	5
Wed 31/7	09:30	18:00	00:30			8	8
Thu 1/8	13:00	18:30	00:00			5.5	5
Fri 2/8	08:30	13:30	00:00			5	5
Sat 3/8							
Sun 4/8							
Mon 5/8							
Tue 6/8	08:30	13:30	00:00	Annual Leave		5	5
Wed 7/8	09:30	18:00	00:30	Annual Leave		8	8
Thu 8/8	13:00	18:00	00:00	Annual Leave		5	5
Fri 9/8	08:30	13:30	00:00	Annual Leave		5	5
Sat 10/8							
Sun 11/8							
			1			51.5	46

Payment	Rate	Mon 29/7	Tue 30/7	Wed 31/7	Thu 1/8	Fri 2/8	Sat 3/8	Sun 4/8	Mon 5/8	Tue 6/8	Wed 7/8	Thu 8/8	Fri 9/8	Sat 10/8	Sun 11/8	29/7-11/8 Units
1, Ordinary Time		5	5	8	5.5	5										28.5
ANNUAL LEA, Annual Leave Taken										5	8	5	5			23

© Enfinit Software Ltd 2010. All rights reserved.

Navigating the Timesheet

This section explains the different areas on the timesheet and tips for entering information.

Action Buttons

You will have some or all of the following actions on the **My time** page:

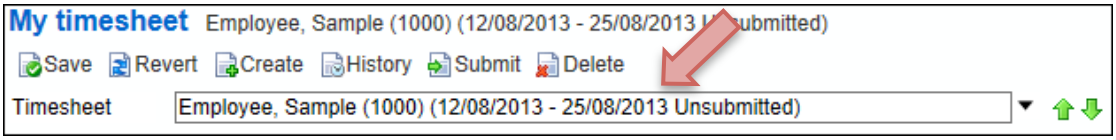
Action	Explanation
Save	• This Action appears when you start entering information into the timesheet • After entering data you should click 'Save' to ensure the information is saved
Revert	• This Action appears when you start entering information into the timesheet • If you have entered information and wish to remove it, by clicking on Revert it will take the timesheet back to the last time it was saved
Create	• Creates a new timesheet for the first available pay period • Will not create a new timesheet for a period which has already had a timesheet created i.e. cannot duplicate timesheets • The message "No further periods have been opened so cannot create a new timesheet at this stage" indicates the current pay period is not open therefore is not available for entering timesheets
History	• Shows historical timesheets
Submit	• Submits the timesheet ready for approval • Submitted timesheets cannot be modified unless it is first Unsubmitted.
Unsubmit	• Shown only when the timesheet has been Submitted • Changes the timesheet back to an editable state • Managers use this to re-open the timesheet so the employee can make changes and re-submit, for example if manager doesn't agree with some entries
Approve	• Only available to Managers/Administrators • Marks the timesheet as Approved • Unapproved timesheets will still be exported to payroll • Timesheets can be Approved regardless of whether they have been submitted or not
Delete	• Deletes the current timesheet. Not reversible. Once a timesheet is deleted a new one will need to be created by clicking Create

© Enfinit Software Ltd 2010. All rights reserved.

Field Definitions

Timesheet Period:

This box shows the pay period that the timesheet is for:



You are able to move backwards and forwards through employees' timesheets by using the green buttons at the right.

Leave Balances:

This area on the timesheet displays leave balances. They are balances as at the last closed pay. Balances update after each payrun is closed. Balances do not update as leave is entered into the Leave Planner or Timesheet, balances are controlled by the actual payroll system.

Timesheet Body:

The below table explains the fields within the body of the timesheet. Every organisation is unique so timesheet layouts will differ between companies (e.g. some companies may show which cost centre payments will be charged to).

This table contains generic fields generally used by all organisations:

Column	Explanation
	• Clicking this button will remove everything that has been entered on this day. It will also remove any additional lines that may have been created on a day • Clicking this button will create a new line. For example if you wanted to enter two time-bands on one day, two leave types taken on one day or a partial day's leave
	• Week days are displayed in black font colour • Weekend days are displayed in purple font colour • Public holidays are displayed in green font colour

© Enfinit Software Ltd 2010. All rights reserved.

Start 08:00	• Employees start time for that day. When timesheet is first opened this will be populated with the rostered start time
End 16:30	• Employees end time for that day. When timesheet is first opened this will be populated with the rostered end time
Break 00:30	• The amount of unpaid break for that day. This is determined by the roster and any configuration rules determining breaks • Breaks can be overridden manually
Leave / work type (optional)	• A picklist of reason codes will be available for recording the type of leave or time worked, for example Annual Leave, Public Holiday Worked, Call-outs. These reason codes are based on what is configured for your particular organisation
Notes	• Free format field used to record any notes about that day
Hours 8	• This calculates the number of hours worked, excluding unpaid breaks. It may differ from rostered hours if any additional time has been worked or the full rostered day has not been worked
Roster 8	• This is the rostered hours for the day

Payment:

Payments are generated according to what is entered on the timesheet e.g. overtime payments, leave taken, Public Holiday payments etc.
Calculated payments will display on each day.
These transactions will be sent through to the payroll system for payment.
Therefore it is important you view this section when entering and/or approving timesheet data.

Payment	Rate	Mon 12/8	Tue 13/8	Wed 14/8	Thu 15/8	Fri 16/8	Sat 17/8	Sun 18/8	Mon 19/8	Tue 20/8	Wed 21/8	Thu 22/8	Fri 23/8	Sat 24/8	Sun 25/8	12/8-25/8 Units
SALARY, Salary	PDR				-1											-1
SICK LEAVE, Sick Leave					1											1

The above example is for a Salaried employee. The transactions are reversing a day's Salary and replacing it with a paid Sick Day.

Status:

This shows the status history of the timesheet and which user has undertaken each function.

Status

Date	Description	Role	Status
9/08/2013 8:59:50 a.m.	EMPLOYEE, Sample	Employee	Unsubmitted

© Enfinit Software Ltd 2010. All rights reserved.

The above example shows the timesheet is currently Unsubmitted. Once it is submitted for approval another line will display showing the date and time the timesheet was submitted and by whom.

© Enfinit Software Ltd 2010. All rights reserved.

Entering Timesheets on behalf of employees

This section assists you in entering timesheet information on behalf of your employees.

After entering timesheet data, you should click **Save**.

Time Entries

New time entries and changes to rostered times can be made against each day. Simply change the rostered start or end time or break time to match what was worked. Applicable payments will be calculated based on the times entered.

For example if employee is entitled to paid overtime and this is configured for payment within the system, altering an end time to show they worked an additional hour, will create an overtime transaction in the Payment section of the timesheet.

Start and End times can be entered in various formats. (All times are shown in 24 hour format). End times will automatically switch to PM in order to be after the Start time on the same day.

Entry	Result
8	8:00 (or 20:00 if used for an End time that starts after 8:00 am)
830	8:30 (or 20:30 if used for an End time that starts after 8:30 am)
1630	16:30 – Translates directly into 24 hour time
430p	16:30 – The p indicates this is 4.30pm, which is then turned into 24 hour time
13	13:00 – Translates directly into 24 hour time
1p	13:00 – The p indicates this is 1 pm, which is then turned into 24 hour time

Break times are entered as the number of minutes of unpaid break. For example 00:30 equates to a 30 minute unpaid break, 01:00 equates to a 1 hour unpaid break.

Start	End	Break
08:00	16:30	00:30
08:00	16:30	01:00

Multiple Time-bands on one day

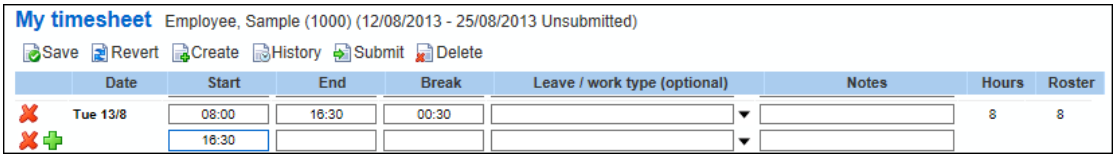
Sometimes multiple time-bands may need to be entered on one day. This may occur in these situations:

- Call-backs after rostered shift finishes
- Split shifts

© Enfinit Software Ltd 2010. All rights reserved.

- Charging time to different cost centre
- Different jobs worked on the one day that are paid differently

To create more than one row on one day, click the button. This will open up an additional row.

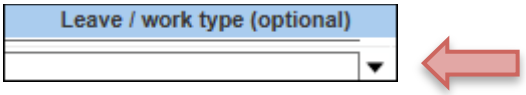


Click the button if you wish to remove a row.

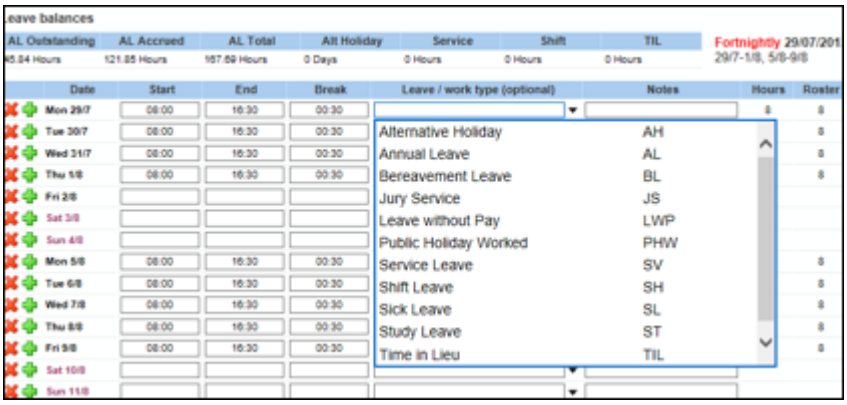
To remove data within a single field, you can click on the 'x' at the end of the box. For example, clicking on the 'x' in this box will remove the Sick Leave reason code from that box. This is quicker than manually back-spacing out the data.

Leave Taken

If you wish to enter some leave taken, click on the black drop-down arrow next to the Leave / Work type box.



A pick-list of reason codes relative to your organisation will appear. Select the appropriate one by clicking on it. Alternatively, if you know the reason type, you can start typing it in the box and it will take you to that reason code.



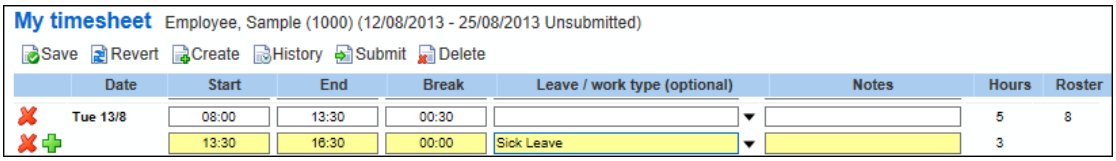
© Enfinit Software Ltd 2010. All rights reserved.

Partial Days Leave

For partial days leave, you should create an additional line for the applicable day.

To create an additional row, click the button.

On the applicable row, select the appropriate leave reason.



The above example shows the employee has taken three hours sick leave from 13:30 to 16:30.

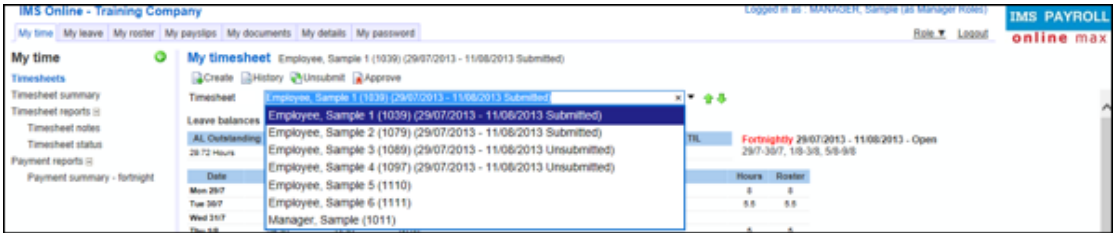
© Enfinit Software Ltd 2010. All rights reserved.

Approving Employees' Timesheets

Employees will submit their timesheets for their manager's approval.

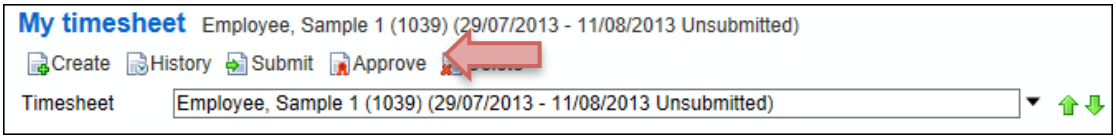
Alternatively, if the manager has entered a timesheet on behalf of an employee, the manager can approve the timesheet straight away. In this instance, the timesheet does not have to be submitted first.

To approve a timesheet, on the **My time** page select the appropriate employees' timesheet from the drop down box by clicking on it.

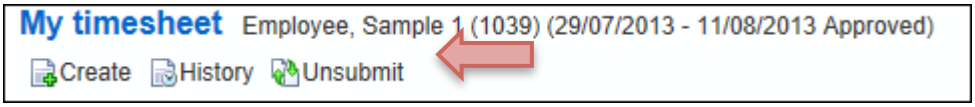


Important: You should check the timesheet entries and the Payments at the bottom of the screen before approving.

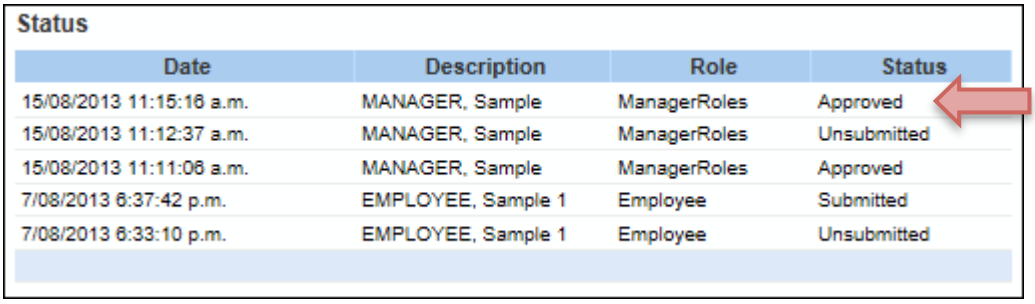
To approve the timesheet, click **Approve**.



After approving, the Action buttons are reduced to Create / History / Unsubmit.



The Status section will be updated to show the date and time the timesheet was approved.

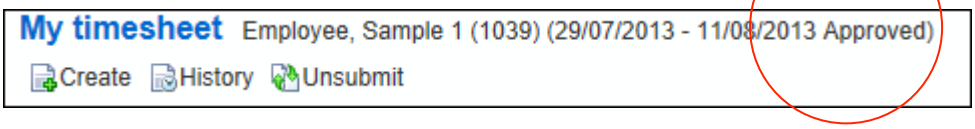


Status

Date	Description	Role	Status
15/08/2013 11:15:16 a.m.	MANAGER, Sample	ManagerRoles	Approved
15/08/2013 11:12:37 a.m.	MANAGER, Sample	ManagerRoles	Unsubmitted
15/08/2013 11:11:06 a.m.	MANAGER, Sample	ManagerRoles	Approved
7/08/2013 6:37:42 p.m.	EMPLOYEE, Sample 1	Employee	Submitted
7/08/2013 6:33:10 p.m.	EMPLOYEE, Sample 1	Employee	Unsubmitted

At the top of the timesheet it will also show Approved

© Enfinit Software Ltd 2010. All rights reserved.

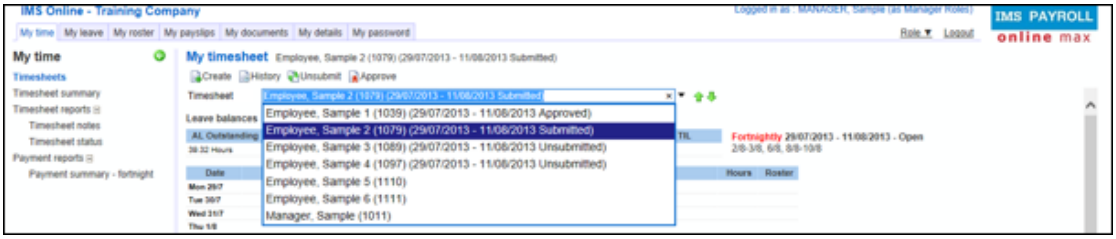


© Enfinit Software Ltd 2010. All rights reserved.

Un-submitting Employees' Timesheets

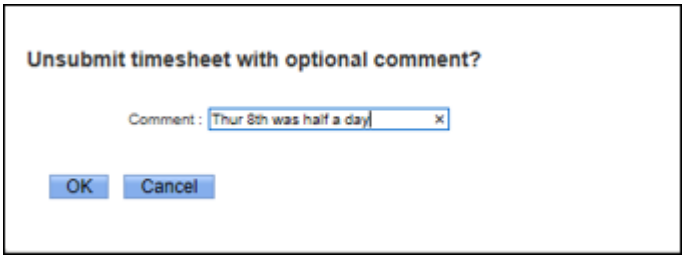
In some instances the manager may not want to approve the timesheet and would like the employee to change it and re-submit.

To un-submit a timesheet, on the **My time** page select the appropriate employees' timesheet from the drop down box by clicking on it.

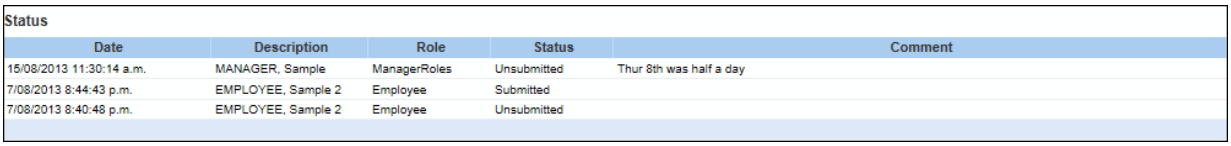


Click **Unsubmit**.

A box appears where you should type a comment in as to why the timesheet is not being approved.



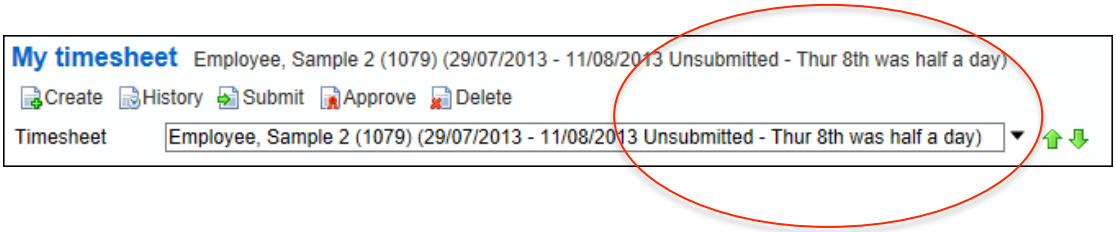
The Status of the timesheet is updated to show it is now Unsubmitted and the comment from above is recorded in the 'Comment' field.



Status

Date	Description	Role	Status	Comment
15/08/2013 11:30:14 a.m.	MANAGER, Sample	ManagerRoles	Unsubmitted	Thur 8th was half a day
7/08/2013 8:44:43 p.m.	EMPLOYEE, Sample 2	Employee	Submitted	
7/08/2013 8:40:48 p.m.	EMPLOYEE, Sample 2	Employee	Unsubmitted	

The top of the timesheet also shows the timesheet is now Unsubmitted and the relative comment.

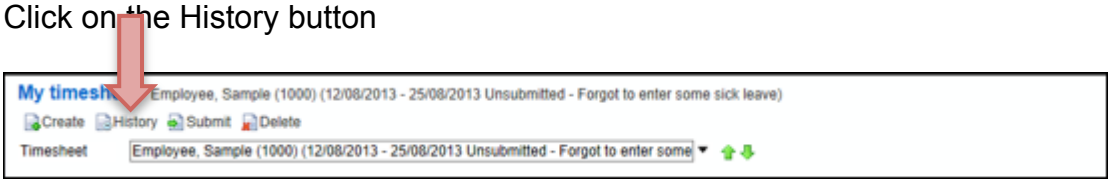


© Enfinit Software Ltd 2010. All rights reserved.

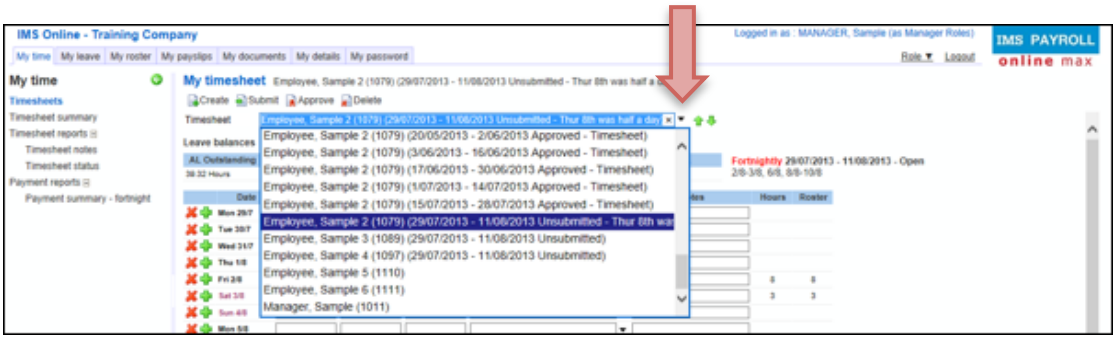
Viewing Historical Timesheets

You can view historical timesheets from the **My time** page.

Click on the History button



The drop down box is where individual timesheets are selected, and can be opened by clicking on the black drop-down arrow on the right. Timesheets will be displayed in employee order, then date order, oldest to newest.



Select the employees' timesheet you wish to view by clicking on it.

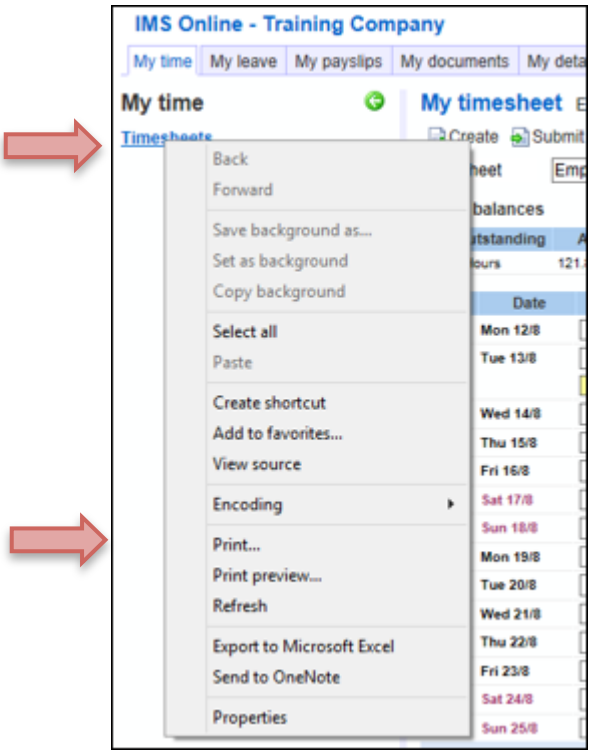
After selecting a timesheet, you can move backwards and forwards between other timesheets by using the green arrows.

© Enfinit Software Ltd 2010. All rights reserved.

Print Timesheets

If you wish to print a timesheet, on the **My time** screen click on Timesheets on the left hand side of the screen.

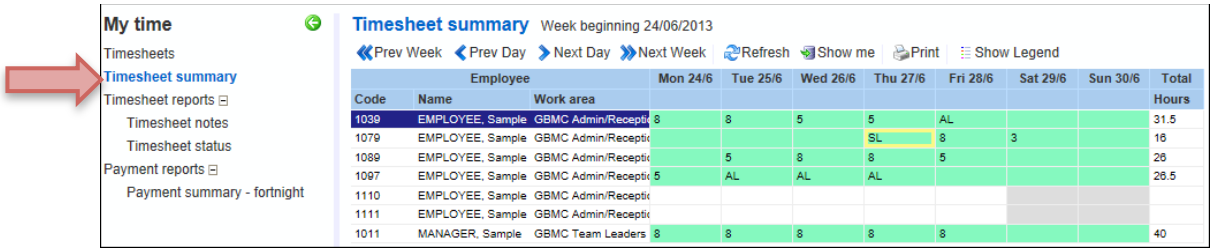
Right click and select Print.



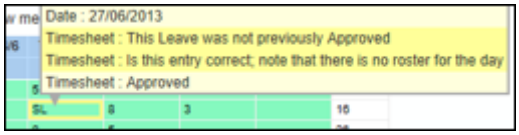
© Enfinit Software Ltd 2010. All rights reserved.

Timesheet Summary

The Timesheet summary is a high-level weekly view of their employees' timesheets. It shows the hours worked or leave entered on each day.



A coloured border is added for warnings (yellow) or critical alerts (red) on any day. Using your mouse you can hover over the coloured warning and a pop-up message appears advising what the warning is.



The above Timesheet Summary shows five employees' timesheet have been approved (highlighted in green). One employee has a warning message against the Sick leave on Thursday 27/6.

Navigation tips

The following buttons allow you to easily navigate within the timesheet summary:

Button	Tips
Prev Week	• View timesheet data from the previous week
Prev Day	• View timesheet data from the previous day
Next Day	• View timesheet data from the next day
Next Week	• View timesheet data from the next week
Refresh	• Updates timesheet data, coloured approvals etc
Show me	• Enter a date to jump to (for example, if you want to look at data from three years previous, use Show Me to enter a date belonging to that year, rather than clicking Previous Year three times)
Show Legend	• Provides you with the colours guide to assist you to better understand the screen

© Enfinit Software Ltd 2010. All rights reserved.

© Enfinit Software Ltd 2010. All rights reserved.

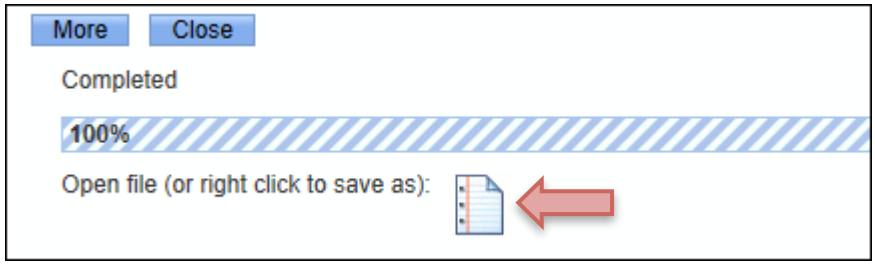
Reports

There are various reports available on the **My time** tab to assist with managing timesheets. Reports can either be viewed on-screen or saved.

Report Output Options

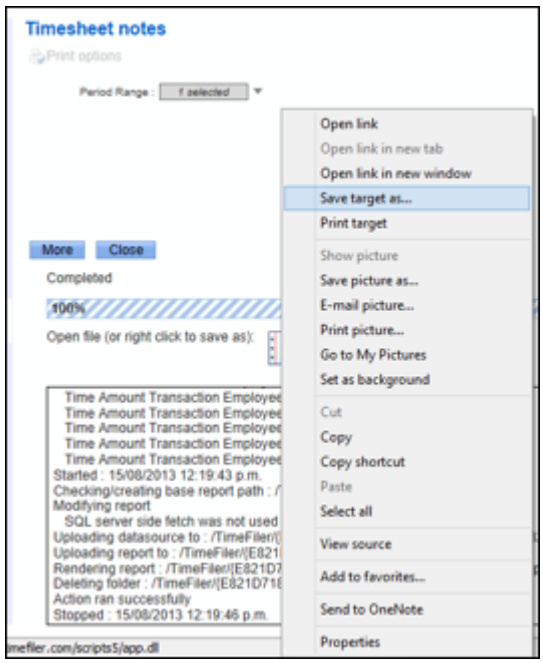
Viewing reports on-screen

After the report has run, left click on the paper symbol to view the report on-screen:



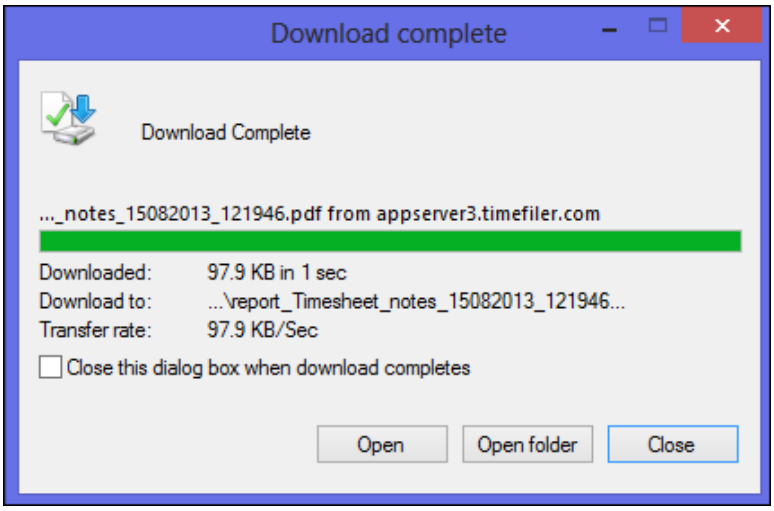
Saving reports

After the report has been run, right click on the paper symbol, click 'Save target as…' and select where you wish to save the report to:



© Enfinit Software Ltd 2010. All rights reserved.

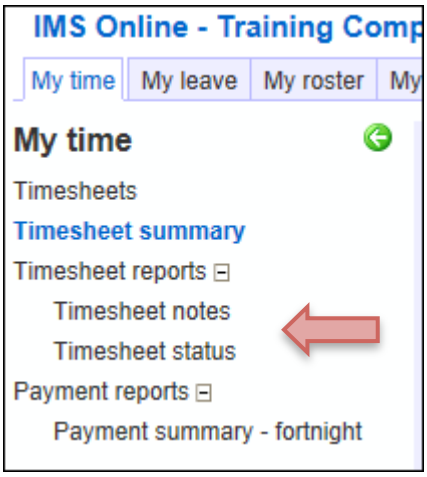
The following screen will appear once the report has been exported to your destination. Click Close.



© Enfinit Software Ltd 2010. All rights reserved.

Timesheet Reports

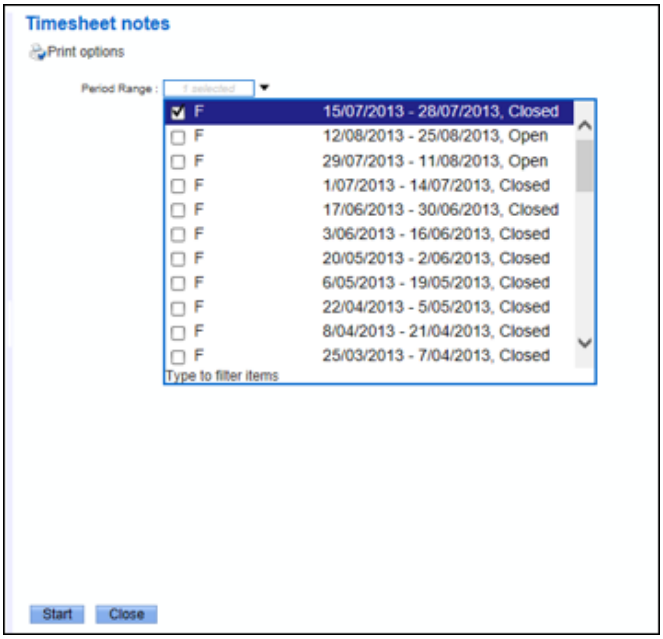
The timesheet reports are listed at the left of the **My time** tab page:



Timesheet Notes

This produces a report of any timesheets that have a comment added against an employee's shift

To run this report, select the applicable pay period and click **Start**:



The report displays any Comments attached to shifts for the manager's review.

© Enfinit Software Ltd 2010. All rights reserved.

Timesheet notes

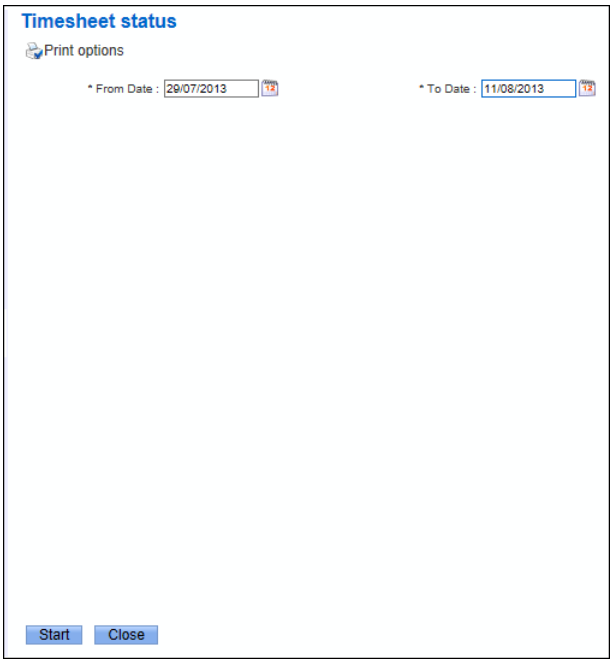
Selected period ranges : 1, Time Entries Only
Additional Filter : (Comment <> blank)
Locale : English New Zealand

Date	Start	End	Units	Reason description	Comment
Work area : GBMC Admin/Reception					
Employee name : EMPLOYEE, Sample 3					
17/07/2013	18:00	20:00	2.00		staff meeting
Work area : GBMC Team Leaders					
Employee name : MANAGER, Sample					
17/07/2013	09:00	19:30	10.00		Full staff meeting

Timesheet Status

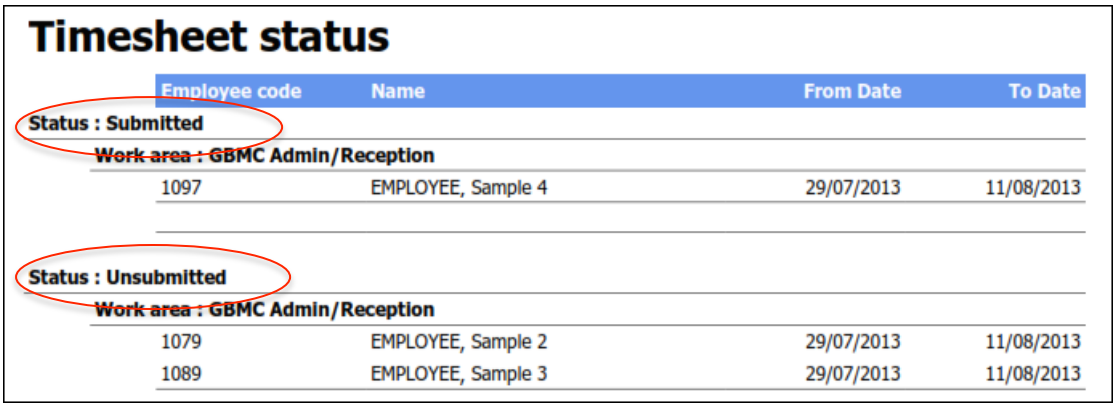
This produces a list of timesheets that are submitted or unsubmitted.

To run this report, select the date range you wish to report on and click **Start**:



The report shows Submitted or Unsubmitted timesheets. This will help managers determine which employees' timesheets still need to be approved prior to pay-day.

© Enfinit Software Ltd 2010. All rights reserved.



Timesheet status

Employee code	Name	From Date	To Date
Status : Submitted			
Work area : GBMC Admin/Reception			
1097	EMPLOYEE, Sample 4	29/07/2013	11/08/2013
Status : Unsubmitted			
Work area : GBMC Admin/Reception			
1079	EMPLOYEE, Sample 2	29/07/2013	11/08/2013
1089	EMPLOYEE, Sample 3	29/07/2013	11/08/2013

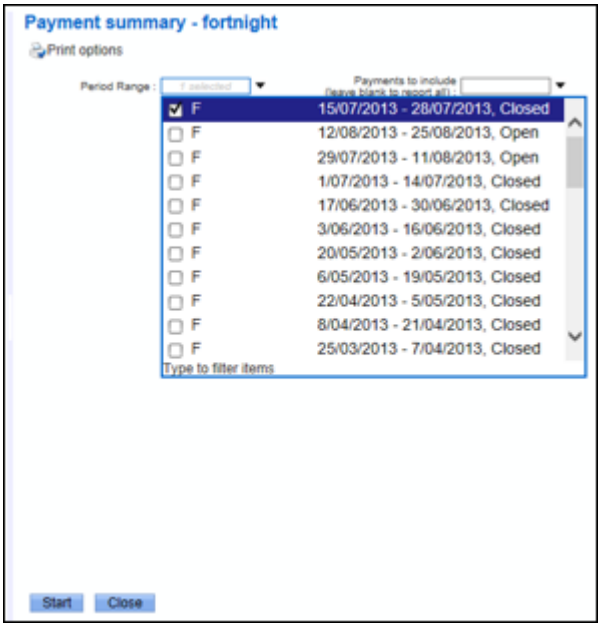
© Enfinit Software Ltd 2010. All rights reserved.

Payment Reports

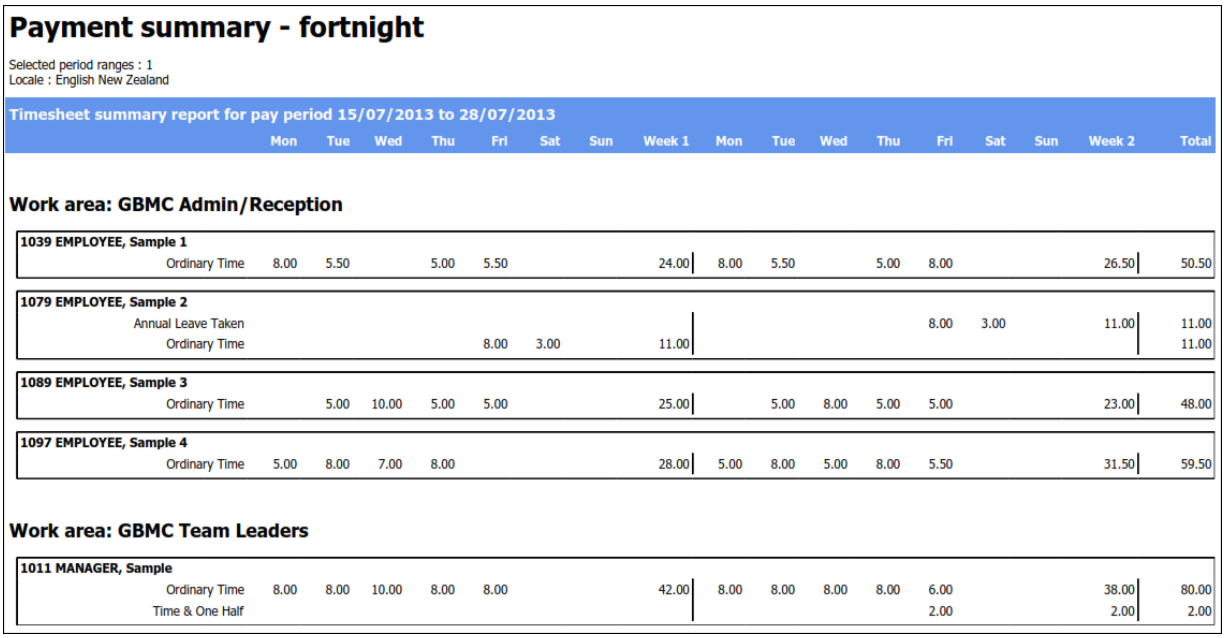
Payment Summary – fortnight

This shows each days' payments applied to each employee for the pay period.

To run this report, select the pay period you wish to report on and click **Start**:



The report details the types of payments or leave, and the applicable hours/units, assigned to each day of the pay period.



Payment summary - fortnight

Selected period ranges : 1
Locale : English New Zealand

Timesheet summary report for pay period 15/07/2013 to 28/07/2013

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Week 1	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Week 2	Total
Work area: GBMC Admin/Reception																	
1039 EMPLOYEE, Sample 1																	
Ordinary Time	8.00	5.50		5.00	5.50			24.00	8.00	5.50		5.00	8.00			26.50	50.50
1079 EMPLOYEE, Sample 2																	
Annual Leave Taken													8.00	3.00		11.00	11.00
Ordinary Time					8.00	3.00		11.00									11.00
1089 EMPLOYEE, Sample 3																	
Ordinary Time		5.00	10.00	5.00	5.00			25.00		5.00	8.00	5.00	5.00			23.00	48.00
1097 EMPLOYEE, Sample 4																	
Ordinary Time	5.00	8.00	7.00	8.00				28.00	5.00	8.00	5.00	8.00	5.50			31.50	59.50
Work area: GBMC Team Leaders																	
1011 MANAGER, Sample																	
Ordinary Time	8.00	8.00	10.00	8.00	8.00			42.00	8.00	8.00	8.00	8.00	6.00			38.00	80.00
Time & One Half													2.00			2.00	2.00

© Enfinit Software Ltd 2010. All rights reserved.

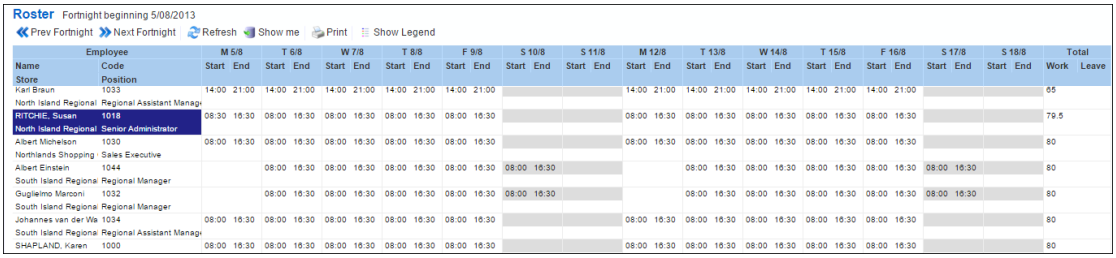
Variable rosters

Some organisations have variable rosters. This allows managers to 'tweak' employees' permanent rosters for particular periods. Variable rosters are typically used in organisations who have very fluid rosters, such as health and retail.

Roster tab page

Roster summary information is displayed on the My Roster tab page:

The roster summary is usually a week, fortnight or a month in length.



Employee		M 5/8		T 6/8		W 7/8		T 8/8		F 9/8		S 10/8		S 11/8		M 12/8		T 13/8		W 14/8		T 15/8		F 16/8		S 17/8		S 18/8		Total	
Name / Store	Code / Position	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End	Work	Leave
Karl Braun	1033	14:00	21:00	14:00	21:00	14:00	21:00	14:00	21:00	14:00	21:00					14:00	21:00	14:00	21:00	14:00	21:00	14:00	21:00	14:00	21:00					65	
North Island Regional	Regional Assistant Manag																														
RITCHIE, Susan	1018	08:30	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					79.5	
North Island Regional	Senior Administrator																														
Albert Michelson	1030	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					80	
Northlands Shopping	Sales Executive																														
Albert Einstein	1044			08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30			80	
South Island Regional	Regional Manager																														
Guglielmo Marconi	1032			08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30			80	
South Island Regional	Regional Manager																														
Johannes van der Wa	1034	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					80	
South Island Regional	Regional Assistant Manag																														
SHAPLAND, Karen	1000	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30	08:00	16:30					80	

- This page, by default, displays the employees' permanent roster, along with any one-off changes that have been made to the roster via this tab page.
- If there is no permanent (default) roster set up for employees then this page will be blank until a one-off roster has been added.

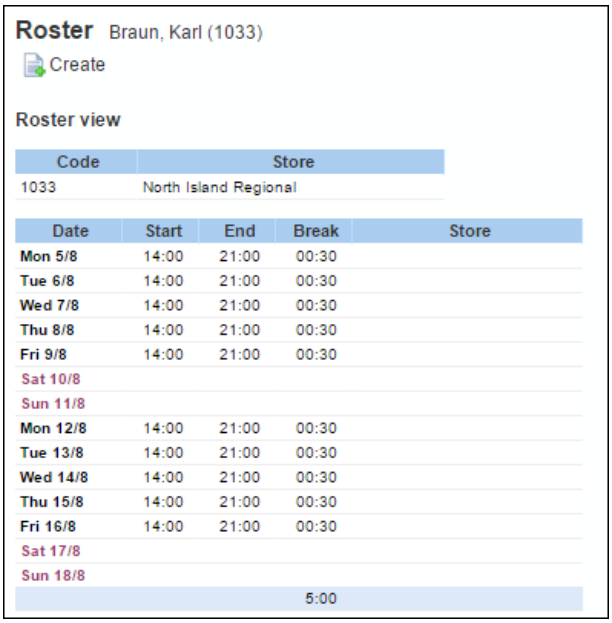
Editing variable rosters

Variable rosters are opened in line with pay periods i.e. if a pay period is fortnightly, then a variable roster will be opened for the same fortnightly period.

Administrators are typically responsible for opening up variable rosters in advance, to allow managers to 'tweak' rosters for employees in their Work areas.

Managers are able to view employees' rosters on the My Roster tab page. If the Variable roster isn't open yet, then the roster won't be editable i.e. as in the screenshot below:

© Enfinit Software Ltd 2010. All rights reserved.



Roster Braun, Karl (1033)

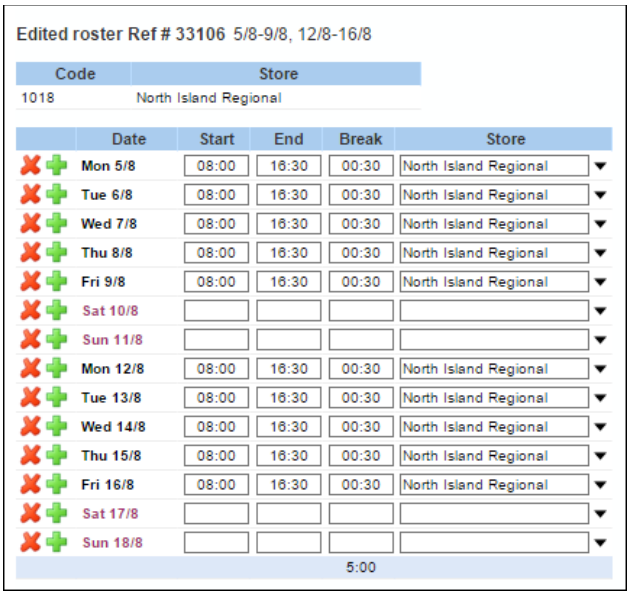
Create

Roster view

Code	Store
1033	North Island Regional

Date	Start	End	Break	Store
Mon 5/8	14:00	21:00	00:30	
Tue 6/8	14:00	21:00	00:30	
Wed 7/8	14:00	21:00	00:30	
Thu 8/8	14:00	21:00	00:30	
Fri 9/8	14:00	21:00	00:30	
Sat 10/8				
Sun 11/8				
Mon 12/8	14:00	21:00	00:30	
Tue 13/8	14:00	21:00	00:30	
Wed 14/8	14:00	21:00	00:30	
Thu 15/8	14:00	21:00	00:30	
Fri 16/8	14:00	21:00	00:30	
Sat 17/8				
Sun 18/8				
			5:00	

When the Variable roster is open, the roster is editable i.e. as in the screenshot below:



Edited roster Ref # 33106 5/8-9/8, 12/8-16/8

Code	Store
1018	North Island Regional

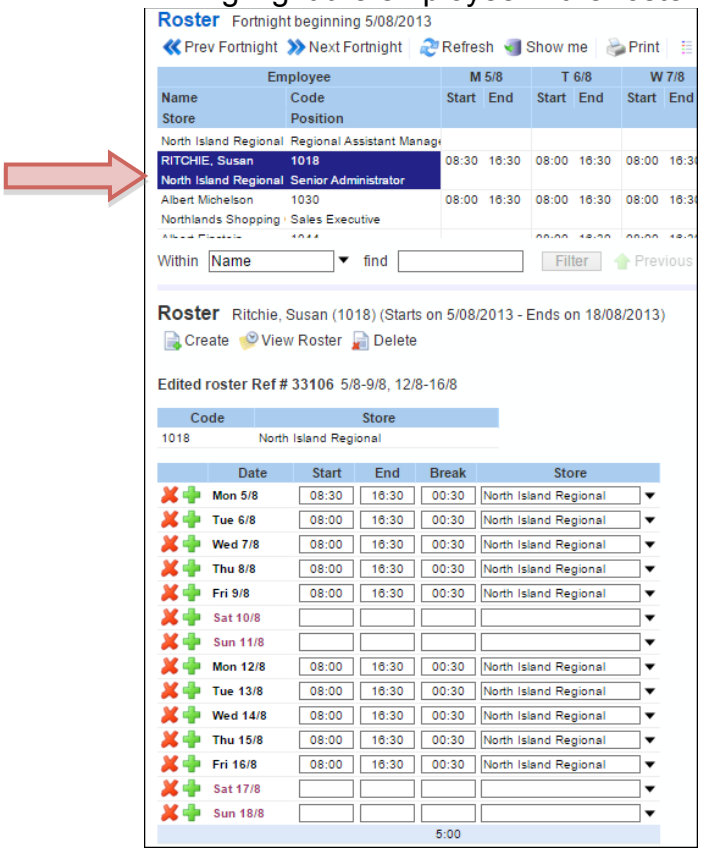
Date	Start	End	Break	Store
Mon 5/8	08:00	16:30	00:30	North Island Regional
Tue 6/8	08:00	16:30	00:30	North Island Regional
Wed 7/8	08:00	16:30	00:30	North Island Regional
Thu 8/8	08:00	16:30	00:30	North Island Regional
Fri 9/8	08:00	16:30	00:30	North Island Regional
Sat 10/8				
Sun 11/8				
Mon 12/8	08:00	16:30	00:30	North Island Regional
Tue 13/8	08:00	16:30	00:30	North Island Regional
Wed 14/8	08:00	16:30	00:30	North Island Regional
Thu 15/8	08:00	16:30	00:30	North Island Regional
Fri 16/8	08:00	16:30	00:30	North Island Regional
Sat 17/8				
Sun 18/8				
			5:00	

© Enfinit Software Ltd 2010. All rights reserved.

Enter a one-off roster change

To enter roster override details for employees:

1. Navigate to the Roster tab page
2. Highlight the employee in the roster summary area of the page:



3. Enter the roster for the fortnight for the employee in the lower half of the screen.
4. Press **Save**.
5. Highlight the next employee you wish to enter a one-off roster for, and repeat the process.

Normally, prior to the timesheets being generated, the Administrator will lock the period's Variable roster. This means the roster is no longer editable. The roster gets copied into the timesheet

- Note, this may vary amongst customers, depending on their configuration, the frequency of their roster/timesheet updates and whether they are a clocking site. Administrators will be able to advise managers if/when rosters are locked.

© Enfinit Software Ltd 2010. All rights reserved.

General Information

Alerts & warnings

As timesheets are updated, coloured warnings may display. There are two types of warnings:

- **Critical (red) warning** – this warning must be addressed; you will not be able to Save or Approve the Timesheet until it has been resolved.
- **Information (yellow) warning** – this warning is for information purposes only; you should read the warning, take action if necessary, otherwise Save or Approve the timesheet as normal.

When a coloured warning is displayed, using your mouse, hover over the coloured alert and a message will appear advising you what the warning or message is.

Warnings Definitions

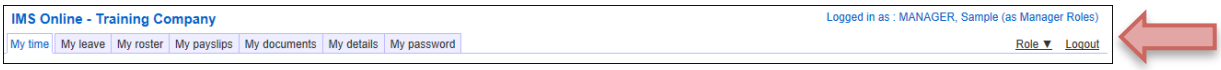
Each organisation will have their own set of messages relative to them.
The below table provides some generic warning messages that may appear.

Warning	Solution
Leave will be capped at Rostered/Standard Daily Hours	Warns that the leave hours will be capped at Rostered or Standard hours for that day. Would generally appear if entering more leave hours than has been rostered for that day, unless your organisation allows employees to take more leave than they are rostered for
Leave will not be deducted, Stat Holiday is payable instead	Advises that if a leave reason has been entered on a Public Holiday, no leave will be deducted, the day will be paid as a Public Holiday
No entitlement to Alt Day accrual	Advises there is no entitlement to an Alternative Holiday for this particular Public Holiday shift
Overlaps with another entry on this day. Please edit or delete this entry	The start time on this time-band is before the end time on the previous time-band. Time-bands cannot overlap
Partial day hours may not be higher than Rostered/Standard Daily Hours	Reduce the number of hours for the partial day to be equal to or less than the Rostered or Standard Daily hours
Please enter a Start/End Time ending in 00, 15, 30, 45 min	The time has not been entered as a quarter hour unit

© Enfinit Software Ltd 2010. All rights reserved.

Logging out of IMS Online Max

Click on the Logout link on the top right hand side of the screen:



Do not click on the X in the top right corner of the screen.

It is important to use the **Logout** link to ensure you are logged out of the system properly.

© Copyright 2010 Enfinit Software Limited. All rights reserved.

No part of this information may be reproduced, translated or transmitted in any form or by any means, electronic or otherwise, or stored in a retrieval system of any nature without the express permission of the copyright holders.

This version replaces all previous versions of this information. Specifications are subject to change without prior notice