



Manager Direct Access – User Guide

Datacom Payroll

Version 1.3



Navigation

The screenshot shows the Manager Direct Access interface. On the left is a dark navigation sidebar with a blue header containing a dollar sign icon and the text "Manager Direct Access" with a dropdown arrow. Below this are two white buttons: "Employee Direct Access" and "Manager Direct Access". Further down are sections for "Leave" (with a dropdown arrow) containing "Leave Requests", "Leave Calendar", and "Leave Schedule"; "Approve Timesheets"; "Employee Info" (with a dropdown arrow) containing "Personal Details", "Payroll Details", "Eligibility to Work Details", "Training Records", and "Qualifications". The "Personal Details" item is highlighted with a red dot. On the right is the main content area with a light grey header containing a hamburger menu icon, a search bar, and the text "manager" with a dropdown arrow. Below the header is the title "Personal Details" and a large white box with the text "Please select a reportee to see the information." Two red callout boxes with white text are present: one pointing to the hamburger menu icon labeled "Switch View", and another pointing to the "Personal Details" title labeled "Reportee Selection".



Navigation

- **Switch View** – Direct Access has two views, Employee Direct Access and Manager Direct Access, which can be toggled by clicking the top most menu
- **Reportee Selection** – Managers can view reportee forms by selecting their direct or indirect reportees from the reportee list



Home

Manager Dashboard

Action Required

- **Kip Muller** 10/Nov/2015
Leave request needs approval
- **Liana Wooleys** 05/Jan/2016 to 07/Jan/2016
Leave request needs approval
- **Liana Wooleys** 09/Feb/2016
Leave request needs approval
- **Shaquana Axford** 12/Jan/2016
Leave request needs approval
- **Shaquana Axford** 05/Jan/2016
Leave request needs approval

Show All ▾

Who is on Leave

- Shaquana Axford** 20/Jul/2016
Annual Leave 8 Hours
- Shaquana Axford** 22/Jul/2016
Annual Leave 8 Hours

Weekly Selection

◀ This Week (17 Jul - 23 Jul) ▶

Anniversaries

- Kip Muller** 21/Jul/2016
Birthday

◀ This Week (17 Jul - 23 Jul) ▶



Home

- **Actions Required** – displays pending leave requests from reportees
- **Who is on Leave** – displays reportees on leave for the selected date range
- **Anniversaries** – displays reportees having birthdays or service anniversaries for the selected date range
- **Weekly Selection** – clicking on < or > will navigate a week forward or back



Leave Requests

Status Filter

Date Range Filter 04/Jun/2016 - 04/Sep/2016 **Approve All**

All Pending Approved Withdrawn **Approve All**

● Timothy Maresca	08/Jun/2016 - 09/Jun/2016	Annual Leave	16 Hours	-	📅
● Vasiliki Lyda	13/Jun/2016 - 14/Jun/2016	Annual Leave	16 Hours	-	📅
● James Bradburn	14/Jun/2016	ACC 1st Week	8 Hours		📅
● Timothy Maresca	14/Jun/2016 - 15/Jun/2016	Annual Leave	16 Hours	-	📅
● James Bradburn	15/Jun/2016	Public Holidays	8 Hours		📅
● James Bradburn	17/Jun/2016	ACC 1st Week	4 Hours	✓	- 📅
● James Bradburn	17/Jun/2016	Annual Leave	2 Hours	✓	- 📅
● Timothy Maresca	21/Jun/2016	Annual Leave	8 Hours		- 📅
● Vasiliki Lyda	28/Jun/2016	LWOP	8 Hours		📅
● James Bradburn	30/Jun/2016	Annual Leave	5 Hours	✓	- 📅

Approve

Withdraw

View



Leave Requests

- Displays leave requests for direct and indirect reportees
- **Status Filter**
 - All – displays all leave requests
 - Pending – displays pending leave requests
 - Approved – displays approved leave requests
 - Withdrawn – displays withdrawn leave requests
- **Date Range Filter** – leave requests filtered based on date range
- **Approve All** – click to approve all pending leave requests in one go. Tooltip on approve icon shows remaining balance
- **View** – navigates to the leave calendar for selected reportee



Leave Calendar

Reportee Selection

Approve/ Edit/ Withdraw Pending Leave

When clicking on Edit, the Edit leave menu opens up, where the manager can update the leave

Leave Calendar

Brian Garcia

20/Apr/2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1	2
9	10	11	12	13	14	15	16
16	17	18	19	20	21	22	23
23	24	25	26	27	28	29	30

Sick Leave

Payment Status: Pending
 Hours Taken: 15
 Days Taken: 2
 Start: 30/Mar/2017
 End: 31/Mar/2017

Approve Withdraw Edit

New Leave

Leave Type *
 Annual Leave

From *
 20/Apr/2017

To *
 20/Apr/2017

Hours Taken *
 7.5

Comment

Add Document

Click to Check Projected Leave Balance

Save Leave Request

Leave Balance

Annual Leave



Leave Schedule

Leave Schedule

< > Weekly Selection 27/Jun/2016 Day Selection

	Jun 2016					Jul 2016						
	Mo 27	Tu 28	We 29	Th 30	Fr 1	Sa 2	Su 3	Mo 4	Tu 5	We 6	Th 7	Fr 8
My Leave Doe, Justin (4179)					Pending				Pending			
My Peers Baxley, Burton (1824) Mcginty, Sherell (1818)												
My Team Axford, Shaquana (4009) Muller, Kip (3573)			Approved									
		Withdrawn	Approved									



Leave Schedule

- A read-only view to view reportees, peers and managers leave at a glance over selected date range
- **Peers leave** – displays days peers are on leave. Leave type, comments and hours are not shown
- **Teams leave schedule** – displays direct and indirect reportees leave including all leave details
- **Week Selection** – click to navigate between weeks
- **Day Selection** – click to select to navigate to a specific calendar day



Manager Dashboard

Manager Direct Access

- Home
- Analytics
- Leave >
- Approve Timesheets**
- Employee Info >
- Proxy Details
- Payroll Requests

Manager Dashboard

Action Required

- Brian King** 19/Jul/2016 to 02/Aug/2016
Timesheet needs approval Pay Run: 337760
- Anthony Wright** 11/Mar/2017
Leave request needs approval
- Brian Garcia** 30/Mar/2017 to 31/Mar/2017
Leave request needs approval
- Brian King** 27/Jun/2017 to 30/Jun/2017
Leave request needs approval

Menu access to approve timesheets

Dashboard access to approve timesheets



Approve Timesheets

Approve Timesheets

Fortnightly PE 01/Aug/2016, Pay Run 337760 2 of 5 rows selected Approve Selected 

Status	Employee	Payments	Details
<input checked="" type="checkbox"/> Pending Approval	Brian King	Ordinary Hours Pay_Hours Worked 61 Overtime x1.5_Hours Worked 10 Annual Leave 16 Hours	
<input checked="" type="checkbox"/> Pending Approval	Brian King	Shared Services >> 12310 Human Resources >> 20210 Wages Ordinary Hours Pay_Hours Worked 3	
<input type="checkbox"/> Not Submitted	Betty Turner	Ordinary Hours Pay_Hours Worked 80	
<input type="checkbox"/> Not Submitted	Deborah Veena Ram	Ordinary Hours Pay_Hours Worked 75	
<input type="checkbox"/> Not Submitted	Elizabeth Green		

Timesheet Status

- Not Submitted** Timesheets do not have any submitted values from employees
- Pending Approval** Timesheets have been submitted by employees and need approval
- Approved** Timesheets have been approved

Employees pay is split by costing (see Brian King)

Shows employees leave hours

Indicates number of rows selected for approval

Send email reminder to reportee

Approve selected timesheet(s)

Drill down into individual timesheet to edit

View Totals per Payment Type



Enter and approve values for timesheet employees

Manager Direct
Access ▾

- Home
- Analytics
- Leave >
- Approve Timesheets
- Employee Info >
- Proxy Details
- Payroll Requests

☰
george

Betty Turner

←

The timesheet has been submitted for your approval.

Save and approve timesheet values

Save & Approve

	Sat 23	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28	Fri 29
▼ Ordinary Hours Pay_Hours Worked	0	0	8	8	8	8	
Add Cost Centre							
▼ Bonus - Contractual			1000				
Add Cost Centre							
Add Type of Pay							

Enter values for reportees on timesheet set up



Timesheet Features

- Approve timesheets individually or in bulk
- View timesheets for past pay runs
- Quick view on timesheet totals by payment type
- View timesheets grouped and ordered by status
- Verify and edit timesheet values submitted by employee
- Save changes and approve timesheets in one go
- Update and approve multiple times before timesheet is processed
- Timesheet locks down for employees after manager approval
- Show leave request hours
- Enter, save and approve values for employees on timesheet



Proxy Details

Proxy Details

Managers for whom I can approve Leave and Timesheets on their behalf

People I Have Approval Authority For

Name	Start	End
------	-------	-----

You do not have approval authority for anyone

People Assigned to Approve on My Behalf

◀ 1 of 1 ▶

Name	Start	End
Ashwin Blakemore	06/Jul/2016	06/Jul/2016

People who can approve Leave and Timesheets on my behalf

Delete an existing proxy

Assign Proxy

Start Date *

End Date *

Proxy *

Assign

Assign your proxy when you are on planned leave



My Leave – Assign Proxy

Search for an employee to assign as your proxy when you are on planned leave

The screenshot shows the 'My Leave' interface with a calendar view. A modal dialog box titled 'The leave request has been saved' is open, containing the following text and fields:

Assign a proxy
 Search for a proxy by first name, last name or employee code

 Cancel Assign

The background calendar shows dates from Sun 26 to Sat 2. Leave requests are indicated by colored bars: blue for 'Pending', red for 'Withdrawn', and green for 'Approved'. For example, on Monday 4th, there is a 'Pending' request from 06/Jul/2016 to 06/Jul/2016. On Tuesday 5th, there is a 'Withdrawn' request. On Wednesday 6th, there is a 'Pending' request. On Thursday 7th, there is a 'Pending' request. On Friday 8th, there is an 'Approved' request. On Saturday 9th, there is a 'Pending' request. On Sunday 10th, there is a 'Pending' request. On Monday 11th, there is a 'Withdrawn' request. On Tuesday 12th, there is a 'Pending' request. On Wednesday 13th, there is a 'Withdrawn' request. On Thursday 14th, there is an 'Approved' request. On Friday 15th, there is a 'Pending' request. On Saturday 16th, there is a 'Pending' request. On Sunday 17th, there is a 'Pending' request. On Monday 18th, there is a 'Pending' request. On Tuesday 19th, there is a 'Pending' request. On Wednesday 20th, there is a 'Pending' request. On Thursday 21st, there is a 'Pending' request. On Friday 22nd, there is a 'Pending' request. On Saturday 23rd, there is a 'Pending' request. On Sunday 24th, there is a 'Pending' request. On Monday 25th, there is a 'Pending' request. On Tuesday 26th, there is a 'Pending' request. On Wednesday 27th, there is a 'Pending' request. On Thursday 28th, there is a 'Pending' request. On Friday 29th, there is a 'Pending' request. On Saturday 30th, there is a 'Pending' request.

On the right side of the interface, there is a 'New Leave' section with the following fields:

- Leave Type * (Annual Leave)
- From * (06/Jul/2016)
- To * (06/Jul/2016)
- Hours Taken * (8)
- Comment

Below these fields are buttons for 'Add Document', 'Click to Check Projected Leave Balance', and 'Save Leave Request'. At the bottom right, there is a 'Leave Balance' section showing 'Annual Leave' with a balance of 387.84 Hours.



Assign Proxy

- Managers can assign a proxy over a date range from two screens
 - **Proxy Details**
 - **My Leave** (when saving a leave request)
- **Start Date** – the day manager goes on leave
- **End Date** – the last day of managers leave
- **Proxy** – a proxy in the company who will be able to view and approve your reportees leave and timesheets between the start and end date specified