Time & Expenses

EPM Connect Guide

Contents

Time & Expenses Module Settings Guide

Our Time & Expenses Module allows your employees to log all overtime, expenses and timesheets, whilst allowing you to fully customise the settings and approvals process to meet your Trust/School's expenses process. This element of self-service will save your HR and Admin teams time and effort, whilst creating a simple process, tailored to individuals. This allows employees to only claim for the expenses relevant to them and ensures your employees' overtime, expenses and timesheets are processed timely and accurately.

Using This Guide

We recommend reading the general guidance below before visiting more specific areas. The steps and navigation within each tab are consistent, so once you've completed one area of the settings you should find it easy to complete the next. However, there are detailed step-by-step guides for each.

General Guidance

The **Settings** page within the **Time & Expenses Module** allows you to set time and expense types, create drop down options and configure settings to simplify the process for your employees. Set values for time and expense claims and ensure that employees can only claim for the expenses relevant to them. We highly recommend using the **Testing** feature after configuring setting to view the whole process before inviting your employees to submit them, ensuring that the processes have been set up exactly as you want them.

Complete the settings in order

The tabs which run across the top can be managed in any order, however we recommend completing these tabs first:

- **Claimant Types**
- **Custom Fields**
- **Expense Items**
- **Time Items**
- **Multipliers**

Once these have been completed move on to:

- **Approver Tags**
- **Approval Routes**

Finally, complete the **Main Settings** tab.

The settings you create can be edited and added to at any time. We therefore recommend focusing on creating the key items you will use regularly and adding in additional settings as and when you need them.

Use the **i** buttons to view more information regarding each field.

Once saved you can view all items on the main screen and can edit any fields by clicking on the or delete by clicking on the . These can be fully customised as you move forward, editing at any time. The icon will copy the item, allowing you to use this as a starting point.

The **Copy Existing** tab displays a list of available Expense Items. These can be used as a starting point for creating new expense items. To use an existing item as a template, select the item you wish to use as a template and click **Copy Selected Item**. The **Details** tab will be displayed with prepopulated information which can be edited to create a new item.

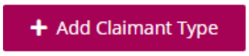
Important

Before inviting your employees to submit expenses complete the settings in full and remember to ensure that the **Active** field is set to **YES**.

Claimant Types

Claimant Types restrict claim items. Only certain employees can add certain claims. For example – only employees within a particular job category, post, or employee type.

1. Select the **Claimant Types** tab. The tab is displayed.
2. Click **+ Add Claimant Type** button.



3. In the **Title** text box add a title, for example 'Admin Team'.
4. From the **Employee Type** drop-down menu, select the option you require.
5. From the **Job Category** drop-down menu, select the option you require.
6. From the **Type of Post** drop-down menu, select the option you require.
7. In the **Length of Service** field, select the number of years and months.
8. Click **Save** to finish.

Custom Fields

The **Custom Fields** tab allows you to create any custom fields that are to be populated when a claim is submitted, that are not available by default on those **Expense** or **Time Items**. These can be used for financial coding, multi-dimensional analysis, or to collect additional information in a consistent format. For example, From and To (i.e. starting point and destination) or Merchant (supplier name), or On Behalf Of (Names of people a temp/Cover Teacher are covering for). You are also able to set Preset values to improve consistency.

You can use an existing source like Job Category or Cost Centre to create custom sets for specific purposes, with or without pre-set values.

Custom Fields can be edited, created from scratch, or based on 'standard' examples or existing records.

Edit an existing Custom Field

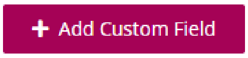
This should be used to edit an existing **Custom Field**.

1. Select the **Custom Fields** tab. The information within the tab is displayed.
2. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Custom Field** window opens and the details tab is displayed.
3. Update the relevant fields.
4. Select the **Preset Values** tab and update the relevant fields.
5. Click **Save** to finish.

Add a Custom Field

If the details are likely to be significantly different to an existing Custom Field, a new Custom Field can be created from scratch. If the Custom Field you are adding is likely to include similar information to an existing Custom Field this can be managed by **Copy Existing**.

1. Select the **Custom Fields** tab.
2. Click the **+ Add Custom Field** button. A new Create Custom field window will open and the **Copy Existing** tab displayed.

   The **Copy Existing** tab displays a list of available Expense Items. These can be used as a starting point for creating new expense items. To use an existing item as a template, select the item you wish to use as a template and click **Copy Selected Item**. The **Details** tab will be displayed with prepopulated information which can be edited to create a new item.

3. Click the **Details** tab. The tab information is displayed.
4. In the **Title** text box, enter a title for the field, for example 'Activity'.
5. In the **Explanation** text box, enter an explanation for the field, for example 'Work Performed'.
6. From the **Source of Values** drop-down list, select an option.

7. Move the **Allow Free Text** toggle to **YES** or **NO**.

8. If you have selected **Allow Free Text**, in the **Maximum Length** of characters field, enter a maximum length.
9. Select the **Preset Values** tab to add preset values.
10. Click the **+ Add Preset Value** button.

11. In the Value field, enter a value.
12. In the **Description** field, enter a description.
13. Set the **Active** toggle to **YES**.

14. Once complete, click **Done**.

15. Click **Save** to finish.

Expense Items

Add a catalogue of expense items that you want your employees to use, from parking and hotels to stationery and postage. Employees will only be able to add expense items set by the Trust/school. Pop ups help you to select standard items from a comprehensive list, or populate new items.

For more information regarding any of the information, hover on the **i** icon.

The **Expense Items** section is split into Mileage and Non-mileage items.

Both types of Expense Item can be created from scratch, or based on 'standard' examples or existing records.

Non-Mileage Items

Non-Mileage items include all items not related to mileage.

You have the option to either:

Edit a current Non-Mileage item – this will edit an item already available within your current settings.

Add a new, custom Mileage item – this will allow you to add a new, mileage item using an existing template via **Copy Existing** or create one from scratch. The **Copy Existing** feature is useful when an item is similar to another item and will share a number of similar fields.

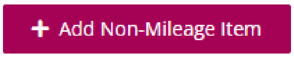
Edit a current Non-Mileage item

1. Select the **Expense Items** tab. The information within the tab is displayed.
2. Scroll down to **Other Expense Items**.
3. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new window opens and the details tab is displayed.
4. Update the relevant fields.
5. Select the **Custom Fields** tab.
6. Update the relevant fields and click **Save** to finish.

Add a Non-Mileage item

You can add a new, mileage item using **Copy Existing** as a template, or create a new one from scratch. **Copy Existing** allows current templates to be used as a starting point for creating new expense items. **Copy Existing** is useful when an item is similar to another item and will share a number of similar fields.

1. Select the **Expense Items** tab. The information within the tab is displayed.
2. Scroll down to **Other Expense Items**.
3. Click the **Add Non-Mileage Item** button. A new **Add Non-Mileage Expense Item** window will open. The **Copy Existing** tab is displayed.



Select the item you wish to use as a template and click **Copy Selected Item**. Or go straight to Details.

4. Click the **Details** tab. The tab information is displayed.
5. In the **Title** field, enter a title.
6. In the **Description** field, enter a description.
7. Ensure the **Active** toggle is moved to **YES**.

8. From the **Claimant Type** drop-down list, select a Claimant Type.
9. If the expense is only available for a limited time, enter dates within the **Effective From** and **Effective To** text boxes.
10. Where appropriate, within the **Fixed Rates** and **Maximum Rates** text boxes, enter a rate.
11. In the **VAT Code** text box, enter a **VAT Code** where applicable.
12. If the item is non-taxable, select the **Non-Taxable** box.
13. In the **Receipt Required** field, use the toggle to select **YES** or **NO.** This defaults to YES

14. Select the **Custom Fields** tab and check the information displayed within the tab and edit any information you wish to change.

Add a Custom Field

1. To add a new custom field, click the **Add Custom Field** button.

   Add Custom Field

2. From the **Custom Field** drop-down menu, select a custom field.
3. From the **Default Value** drop-down menu, select a default value.
4. Move the **Allow Default Overrides** toggle to **YES** or **NO**.

   The **YES/NO** toggle confirms whether the user can override default values.

5. Move the **Mandatory** toggle to **YES** or **NO**.
6. Move the **Allow Free Text** toggle to **YES** or **NO**.
7. Click the **Add Custom Field** button and repeat the process as many times as required.

   Add Custom Field

Multipliers

1. Select the **Multipliers** tab.
2. Check the information displayed within the tab and edit any information you wish to change.
3. Click **Save** to finish.

   Save

   Missing mandatory field will prompt you to return to the original page

Mileage Items

You have the option to either edit a current mileage item or add a new custom item.

Edit a current Mileage item – this will edit an item already available within your current settings

Add an existing Mileage item – this will allow you to add an additional item from a catalogue of items pre-configured by EPM and will allow you to further configure the item's settings

Add a new, custom Mileage item – this will allow you to add a new mileage item using an existing template in **Copy Existing** or create one from scratch. The **Copy Existing** feature is useful when an item is similar to another item and shares a number of similar fields.

Edit a current Mileage item

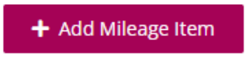
1. Select the **Expense Items** tab. The information within the tab is displayed.
2. Scroll down to **Mileage Items**.
3. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Mileage Expense Items** window opens and the details tab is displayed.
4. Update the relevant fields.
5. Select the **Custom Fields** tab and update the relevant fields.
6. Update the relevant fields and click **Save** to finish.

   Save

Add a Mileage item

You can add a new, mileage item using an existing template using **Copy Existing** or create a new one from scratch. **Copy Existing** is useful when an item is similar to another item and will share a number of similar fields.

1. Select the **Expense Items** tab. The information within the tab is displayed.
2. Scroll down to **Mileage Items**.
3. Click the **Add Mileage Item** button. A new **Add Mileage Expense Item** window will open and the **Copy Existing** tab displayed.

   Select the item you wish to use as a template and click **Copy Selected Item**. Or go straight to Details.

4. Click the **Details** tab. The tab information is displayed.
5. In the **Title** field, enter a title.
6. In the **Description** field, enter a description.
7. Ensure the **Active** tab is selected.

8. From the **Claimant Type** drop-down menu, select an option.
9. In the **Effective From** field, select a date.
10. In the **Effective To** field, select a date.
11. From the **Vehicle Type** drop-down menu, select an option.
12. From the **Vehicle Provision** drop-down menu, select an option.
13. In the **Minimum Engine Size (CC)** field, select a date.
14. In the **Maximum Engine Size (CC)** field, select a date.
15. In the **Initial Rate** field, enter a rate.
16. In the **Passenger Rate** field, enter a rate.
17. In the **Initial Rate Limit (Miles)** field, enter a rate.
18. In the **Subsequent Rate** field, enter a rate.
19. Tick the **Non-Taxable** box if relevant.
20. In the **Receipt Required** field, use the toggle to select **YES** or **NO.** This defaults to YES

21. Click **Save** to finish.

Time Items

This tab allows you to configure overtime, cover teaching hours, voluntary work and any other time related items. Tailor templates or create bespoke items and create multiple versions for different claimant types. Set rates and manage restrictions, for example 'Weekdays from 5pm' for Evening Overtime.

Edit a current Time item

1. Select the **Time Items** tab. The information within the tab is displayed.
2. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Time Item** window opens and the details tab is displayed.
3. Update the relevant fields.
4. Select the **Custom Fields** tab and update the relevant fields.
5. Update the relevant fields and click **Save** to finish.

Add a new Time Item

1. Select the **Time Items** tab. The information within the tab is displayed.
2. Click the **+ Add Time Item** button. A new **Add Time Item** window will open and the **Copy Existing** tab displayed.

   Select the item you wish to use as a template and click **Copy Selected Item**. Or go straight to Details.

3. Click the **Details** tab. The tab information is displayed.
4. In the **Title** field, enter a title.
5. In the **Description** field, enter a description.
6. Ensure the **Active** tab is selected.

7. From the **Claimant Type** drop-down menu, select an option.
8. In the **Effective From** field, select a date.
9. In the **Effective To** field, select a date.
10. From the **Renumeration Type** drop-down menu, select an option.
11. In the **Salary Percentage** tab, enter a percentage.
12. From the **Applies On** drop-down list box, select the type of days this applies to,
13. In the **Outside Working Hours Only** text box, move the toggle to **YES** or **NO**.
14. In the **From** text box, add a start time.
15. In the **To** text box, add an end time.
16. Select the **Custom Fields** tab and check the information displayed within the tab and edit any information you wish to change.

Add a Custom Field

You can also add Custom Fields that can/must be populated when this item is selected on a claim.

1. To add a custom field, click the **Add Custom Field** button.

   Add Custom Field

2. From the **Custom Field** drop-down menu, select a custom field.

   From the **Default Value** drop-down menu, select a default value.

3. Move the **Allow Default Overrides** toggle to **YES** or **NO**.

   The YES NO toggle confirms whether the user can change it if a default value is set (above or from another source).

4. Move the **Mandatory** toggle to **YES** or **NO**.
5. Move the **Allow Free Text** toggle to **YES** or **NO**.
6. Click the **Add Custom Field** button and repeat the process as many times as required.

   Add Custom Field

   Should any mandatory fields remain incomplete, you will be prompted to return to the original page.

7. Click **Save** to finish.

   Save

Multipliers

This section allows you to manage **Multipliers** which provide quantities for non-mileage Expense Items, for example the number of nights for a hotel claim, the number people lunch was bought for or quantity of pairs of uniform items bought.

Either select one of the items listed in **Copy Existing** and complete the **Details**, or jump straight to **Details** to create a new item.

Editing an existing Multiplier

1. Select the **Multiplier** tab. The information within the tab is displayed.
2. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Expense Line Multiplier** window opens and the details tab is displayed.
3. Update the relevant fields.
4. Click **Save** to finish.

   Save

Add a Multiplier

1. Select the **Multipliers** tab.
2. Click the **Add Expense Line Multiplier** button.

   + Add Expense Line Multiplier

   Select the item you wish to use as a template and click **Copy Selected Item**. Or go straight to Details.

3. Click the **Details** tab. The tab information is displayed.
4. In the **Title** field, enter a title.
5. In the **Explanation** field, enter an explanation.
6. In the **Decimal Places** field, enter a decimal place.
7. In the **Default Value** field, enter a **Default Value.**
8. Click **Save** to finish.

   Save

Approver Tags

Approver Tags are used to specify who can approve each stage of an **Approval Route** for **Time** and **Expense Claims** and **Timesheets**. It defaults to **Line Manager** and **Head of Department** but you can add up to 5 approval tags.

Edit an existing Approver Tag

1. Select the **Approver Tags** tab. The information within the tab is displayed.
2. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Approver Tag** window opens and the details tab is displayed.

   If the pencil icon is greyed out the Approver Tag cannot be edited.

3. Click the **+ Add Approvers** button to add additional approvers.

   + Add Approver

4. Select all users that apply.
5. Click the **Add Selected Approvers** button.

   Add Selected Approvers

6. Click **Save** to finish.

   Save

Add an Approver Tag

1. Select the **Approver Tag** tab. The information within the tab is displayed.
2. Click the **+ Add Approver Tag** button.

   + Add Approver Tag

3. In the **Title** field, enter a title.
4. Click the **+ Add Approvers** button to add additional approvers.

5. Select all users that apply.
6. Click the **Add Selected Approvers** button.

7. Click **Save** to finish.

Once saved you can view all items on the main screen and can edit any fields by clicking on the or delete by clicking on the . These can be fully customised as you move forward, editing at any time. The icon will copy the item, allowing you to use this as a starting point.

Approval Routes

This tab allows you to determine who will be responsible for approving expenses when they are submitted. **Approval Tags** Settings must be updated before updating **Approval Routes**.

Add up to 5 approval stages, in any order you like. For example, Line Manager only, Line Manager and Final Approver or Line Manager, Department Head and Finance.

Edit Existing Approval Routes

1. Select the **Approval Routes** tab. The information within the tab is displayed.
2. Click the pencil icon in the far right-hand column of the expense item you wish to edit. A new **Edit Approval Route** window opens and the details tab is displayed.
3. Update the relevant fields.
4. Click the **+ Add Approval Stage** button.

5. Check the information displayed within the tab and edit any information you wish to change.
6. From the **Approver Tags** drop-down menu, select all relevant Approver Tags.
7. From the **Approval Condition** drop-down menu, select the approval condition.

   Approval Condition only applies if there are multiple approvers.

8. From the **Approver Order ('Level')** drop-down menu, select the relevant Approver Order.
9. From the **Re-use Previous Approvals** drop-down menu, select an option.

   You can choose **Re-use Previous Approval** or **Prevent re-approval by that user,** for example if a Finance Manager is the standard Approver but also the person putting through the expense.

Should you need to change the order of approval, for example Department Manager ahead of HR Team, click the pencil icon and change the **Approval Order**.

10. Click the **Done** button to continue.

9. Click the **+ Add Approver Stage** to repeat the process.

10. Click **Save** to finish.

Add Approver Routes

1. Select the **Approver Routes** tab. The information within the tab is displayed.
2. Click on the **+ Add Approval Route** button. A new **Create Approval Route** window opens and the details tab is displayed.
3. Update the relevant fields.
4. Click the **+ Add Approval Stage** button.

5. In the **Title** field, enter a title.
6. In the **Description** field, enter a description.
7. From the **Approver Tags** drop-down menu, select all the approver tags that need to approve the absence.
8. From the **Approval Condition** drop-down menu, select the approval condition.
9. From the **Approval Order** drop-down menu, select the order in which these users should approve the absence.
10. From the **Re-use Previous Approvals** drop-down menu, select the option that applies.

This is only relevant if the **Approval Order** selected is past the first stage,

Click the pencil icon if you wish to change the **Approval Order**.

11. Click the **Done** button to continue.
12. Click the **+ Add Approver Stage** to repeat the process.
13. Click **Save** to finish.

Main Settings

These settings affect the whole module, we recommend completing this tab last. This area allows you to adjust main settings and activate claims.

You must change **Activate Expense Claims** to **YES** to activate the settings you have set and allow employees to set claims.

Shared Settings

1. Select the **Main Settings.**
2. Within the **Shared Settings** section, move the **Enable Custom Field-based Approvals** toggle to **YES** or **NO**.

   Custom Field-based Approvals allow powerful content-based approvals, but are complex and must be set up carefully.

   If enabled, a **Custom Field-based Approvals Approver Tag** becomes available for **Approval Routes**. **Approval Route** drop-downs appear when editing **Custom Field Preset Values**, **Cost Centres**, **Account Codes** and **job Categories**.

Expense Claim Settings

Expense Claims are used to reclaim out-of-pocket expenses and travel costs, using preset T&EItems to represent spend types. These may include additional information for approval or accounting, using **Custom Fields**.

1. Select the **Main Settings** tab and scroll down to **Expense Claim Settings.**
2. Tick either **External URL** or **File** to add a copy of your Expenses Policy for employees to view.
3. If you have ticked **External URL**, paste your URL in the **Expenses Policy URL** box.
4. Select the **Approval Route**.

   This must be set up within the **Approval Routes** tab first.

5. In the **Expenses Header Guidance**, enter a message.
6. In the **Sign Off Message**, enter a message.

   The **Expenses Header** and **Sign Off Message** will appear as a header and footer within the expenses claim. The **Sign Off Message** must be ticked for confirmation before submitting the expense.

   Example **Expenses Header**: 'Please ensure all expenses are added and checked before submission'

   Example **Sign Off Message**: 'I confirm that all the details are truthful and accurate'.

7. Click the **Required Custom Fields** button. The field expands.

The **Add Required Custom Field** allows you to select Custom Fields to be added to every Expense Claim. Defaults can be overridden on items if necessary. Sets are maintained in the **Custom Field** tab. Some have been created as standard.

8. From the **Custom Field** drop-down menu select a custom field.
9. From the **Default Value** drop-down menu select a default value.
10. Move the **Mandatory** toggle to **YES** or **NO**.

11. Move the **Allow Free Text** toggle to **YES** or **NO**.

12. Move the **Allow Default Overrides** toggle to **YES** or **NO**.

This will determine whether the user can over-ride default values.

13. In the **Purpose for Expense Claims** field, select whether the claim is **Mandatory**, **Optional** or **Not Used**, by ticking the appropriate box.

This adds a **Purpose** test field at the top of every **Expense Claim** line, regardless of the item. Alternatively, you can add a **Purpose Custom Field** to individual items, which also allows greater control, but it will not show at the top of each line.

14. Move the **Receipts Required for Motor Vehicle Mileage** toggle to **YES** if receipts are required by default for mileage claims. If not move the toggle to **NO**.

15. In the **Use Miles from Home** field, select **Entry Require**, **Use Last**, **Optional** or **Not Used**.

If used, an additional field is displayed for claimants to enter their normal commute mileage, to subtract from the mileage total. **Use Last** means the last value ius automatically applied.

16. From the **Mileage Default Pay Code** field select

Set a default **Pay Code for Mileage** payroll exports. This is optional and can be overridden on individual **Mileage Items**.

17. Move the **Activate Expense Claims** toggle to **YES** or **NO**.

18. Move the **Receipts Required for Motor Vehicle Mileage** toggle to **YES** if receipts are required by default for mileage claims. If not move the toggle to **NO**.

Set a default **Pay Code for Non-Mileage** payroll exports. This is optional and can be overridden on individual Non-**Mileage Items**.

19. Move the **Activate Expense Claims** toggle to **YES** or **NO**.

Important

This can be used to disable Expense Claims e.g. while changing settings. Only enable this once all setup required for Expense Claims is complete and tested.

Time Claim Settings

Time Claims record time worked, usually to claim any respective additional payments for overtime or non-standard work, using pre-set Items to represent activities. These may include additional information for approval or accounting, using **Custom Fields**.

1. Select the **Main Settings** tab and scroll down to **Time Claim Settings.**
2. Tick either **External URL** or **File** to add a copy of your **Time Claim Policy** for employees to view.
3. If you have ticked **External URL**, paste your URL in the **Time Claim Policy URL** box. If you have ticked **File** click **Upload new policy**.
4. From the **Time Claim Approval Route** menu, select an option from the drop-down menu.
5. In the **Time Claim Header Guidance**, enter a message.
6. In the **Time Claim Sign Off Message**, enter a message.

   The **Time Claim Header** and **Sign Off Message** will appear as a header and footer within the expenses claim. The **Sign Off Message** must be ticked for confirmation before submitting the expense.

   Example **Time Claim Header**: 'Please ensure all expenses are added and checked before submission'

   Example **Time Claim Sign Off Message**: **'**I confirm that all the details are truthful and accurate'.

7. Click the **Required Custom Fields** button. The field expands.

   Add Required Custom Field

   The **Add Required Custom Field** allows you to select Custom Fields to be added to every Expense Claim. Defaults can be overridden on items if necessary. Sets are maintained in the **Custom Field** tab. Some have been created as standard.

8. From the **Custom Field** drop-down menu select a custom field.
9. From the **Default Value** drop-down menu select a default value.
10. Move the **Mandatory** toggle to **YES** or **NO**.

    YES

11. Move the **Allow Free Text** toggle to **YES** or **NO**.

    YES

12. Move the **Allow Default Overrides** toggle to **YES** or **NO**.

    YES

    This will determine whether the user can over-ride default values.

13. In the **Purpose for Time Claims** field, select whether the claim is **Mandatory**, **Optional** or **Not Used**, by ticking the appropriate box.

    This adds a **Purpose** test field at the top of every **Time Claim** line, regardless of the item. Alternatively, you can add a **Purpose Custom Field** to individual items, which also allows greater control, but it will not show at the top of each line.

14. From the **Details Required for Time Claims** drop-down menu, select an option.

    Determine how users enter details for time worked. With each option, the field not listed is calculated.

    For example, the first option means that when the **Start Time**, **Breaks** and **End Time** have been entered, **Hours Worked** is calculated.

15. From the **Flat Hourly Rate Default Pay Code** drop-down menu, select an option.

    Set a default **Pay Code** for **Flat Hourly Rates** on **Time Claims** payroll exports (optional). This can be overridden on individual **Time Items**.

16. From the **Daily Hourly Rate Default Pay Code** drop-down menu, select an option.

    Set a default **Pay Code** for **Flat Daily Rates** on **Time Claims** payroll exports (optional). This can be overridden on individual **Time Items**.

17. Move the **Activate Time Claims** toggle to **YES** or **NO**.

Important

This can be used to disable **Time Claims** e.g. while changing settings. Only enable this once all setup required for **Time Claims** is complete and tested.

Timesheets Settings

Timesheets are used to record time worked. They do not use **Items** or **Custom Fields**, although notes can be added on each line (e.g. to record activities).

1. Select the **Main Settings** tab and scroll down to **Timesheet Settings.**
2. From the **Timesheet Approval Route** drop-down menu, select an option**.**

   Choose the approval route for **Timesheets**. Routes are maintained in the **Approval Routes** tab. Only routes that do not use Custom Field-based **Approvals** can be used for **Timesheets**.

3. From the **Details Required for Timesheets** drop-down menu, select an option**.**

   Determine how users enter details of time worked. With each option, the field not listed is calculated.

   For example, the first option means that when the **Start Time**, **Breaks** and **End Time** have been entered, **Hours Worked** is calculated.

4. From the **Timesheet Default Pay Code** drop-down menu, select an option.

Set a default **Pay Code for Timesheet** payroll exports (required). This can be overridden on individual **Job Categories**.

5. Move the **Activate Timesheets** to **YES** or **NO**.

Important

This can be used to disable **Time Claims** e.g. while changing settings. Only enable this once all setup required for **Time Claims** is complete and tested.

6. Click **Save** to finish.

Testing

To ensure your policies and processes are set up as desired, we recommend testing once settings have been completed.

This allows you to test **Claims and Timesheets** to ensure that the settings you have configured are working in the way you intended.

Test either as an **Yourself** or as **An Employee** or ideally test from both sides to view the whole process.

Should you notice anything that you wish to amend, simply head back to settings and amend as required. This also provides you with an insight into the employee's experience, allowing you to answer any questions with confidence.

1. On the left-hand side of the EPM Connect window, click **Time & Expenses**. A list of further menu options is displayed.
2. Select **Testing**. The **Test Claims and Timesheets** page opens.
3. Select the item you wish to test and follow the instructions within the **Time & Expenses** Module Guide to test the claim and the settings you have created.