Resource Management User Guide

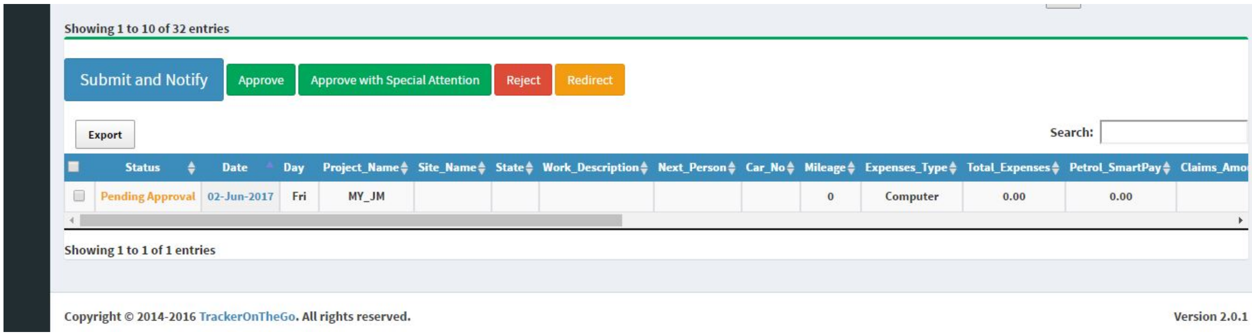
➢ CLAIM MANAGEMENT

- How to approve claim

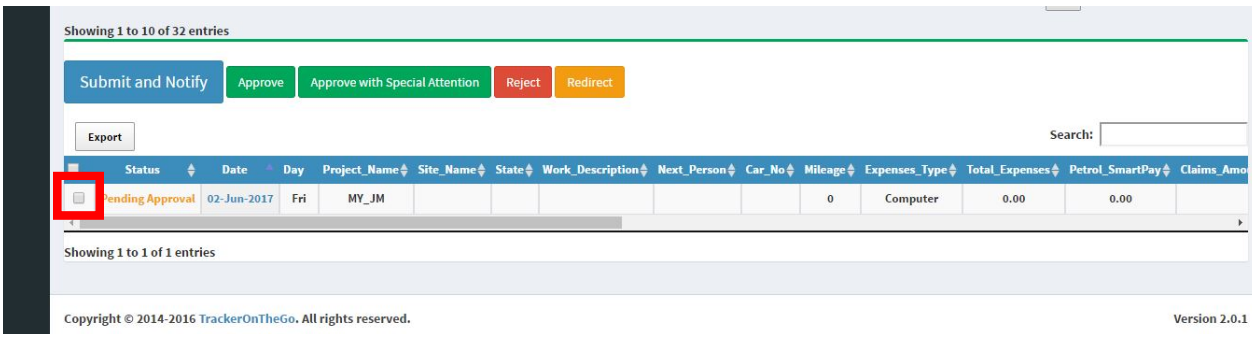
1. Click **Resource Management** > **Claim Management**
2. Click > **Pending Review Claim** tab to view claims that is pending for approval

3. Click **Review**

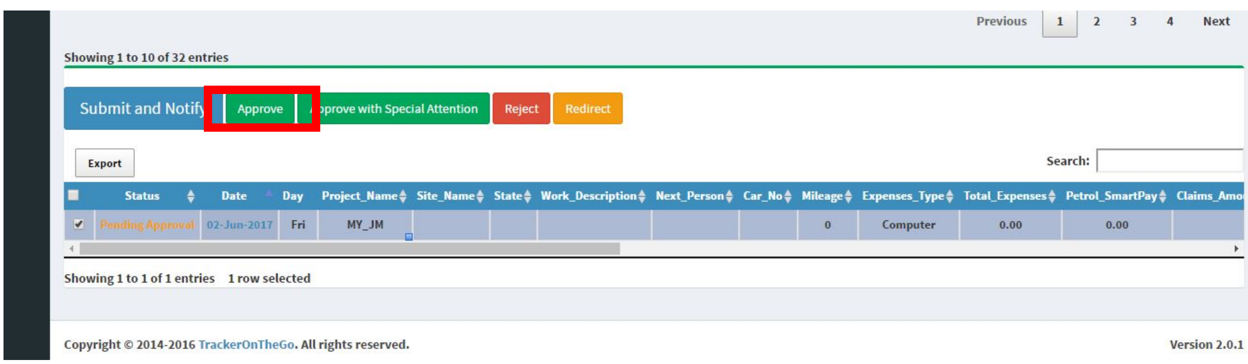
4. Scroll down to view the details of the selected claim



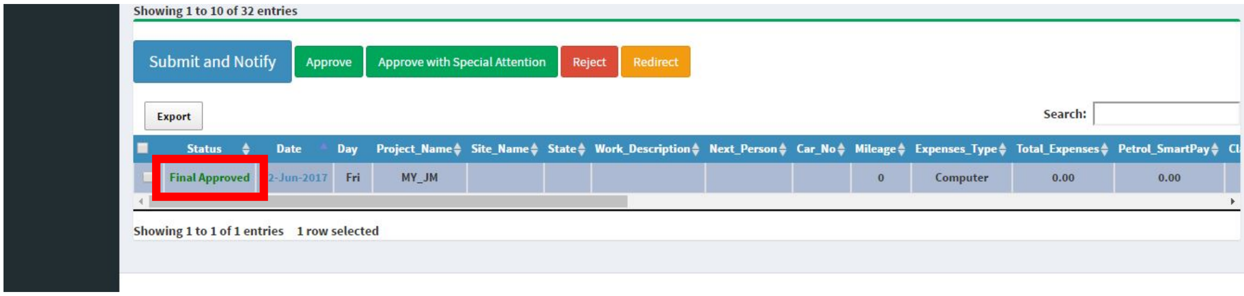
5. **Tick** on the rows that you wish to Approve



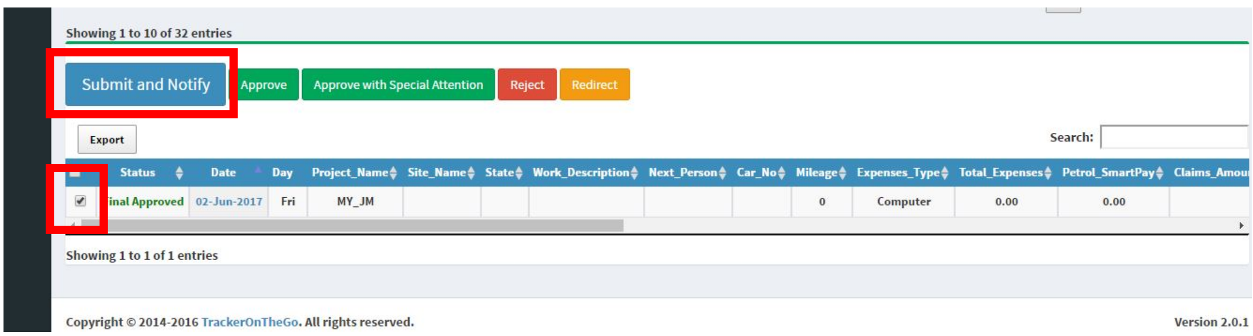
6. Click **Approve**



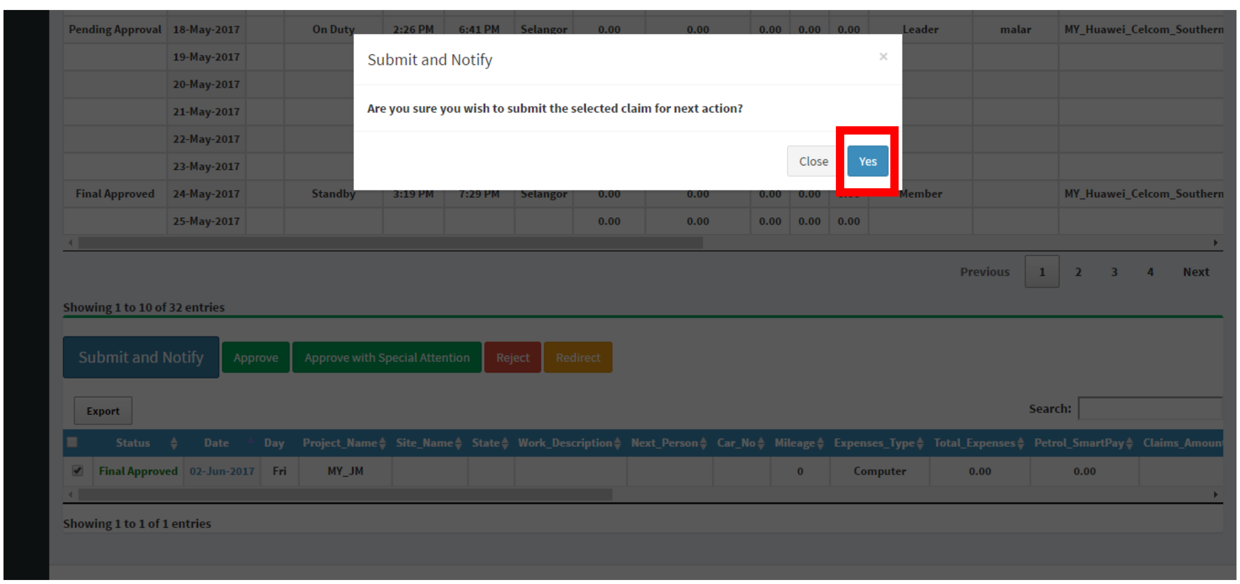
7. Then status will change from **Pending > Approved**



8. **Tick** on the rows that you wish to proceed for next action and click **Submit for Next Approval** button

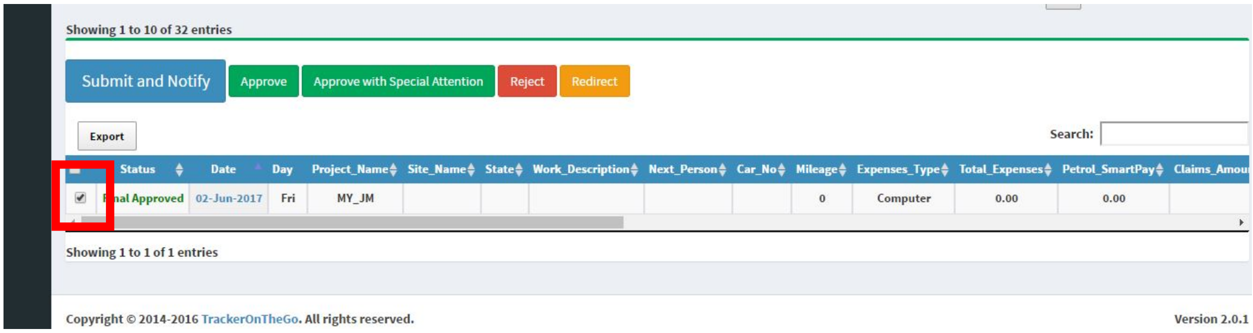


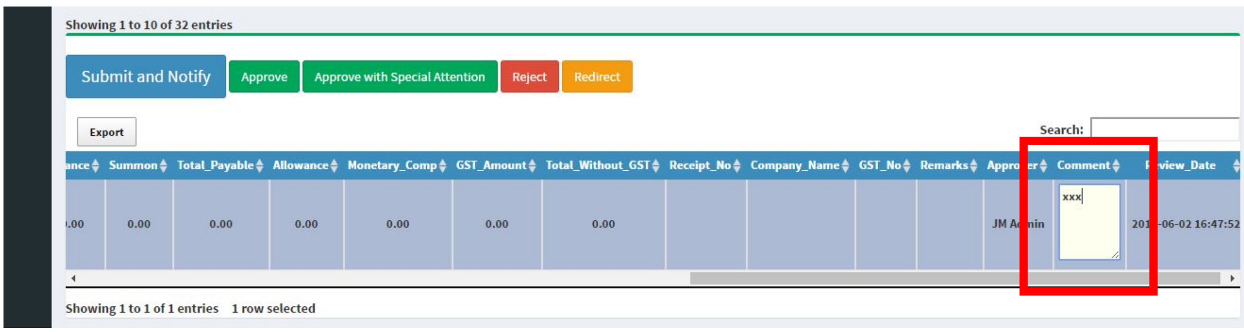
9. Click **Yes** (The request will be proceeded for next level of approval)



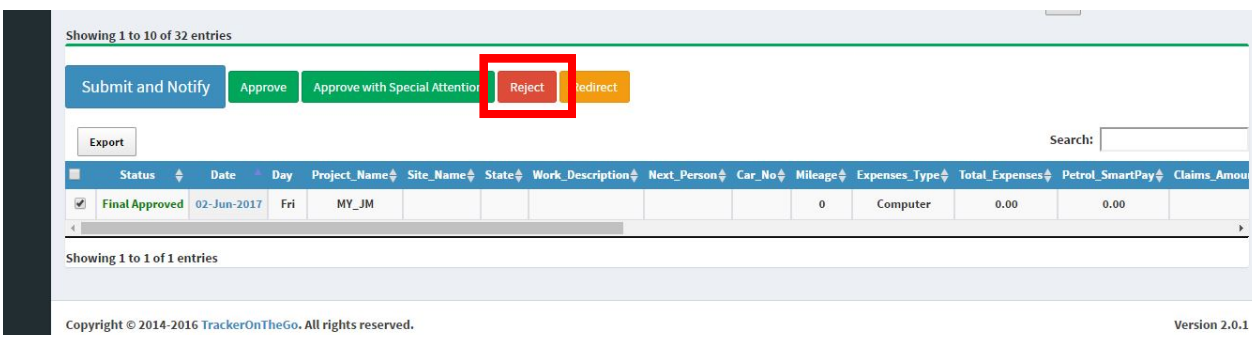
- How to reject claim

1. **Tick** on the rows you wish to reject, insert **Comment** for rejection

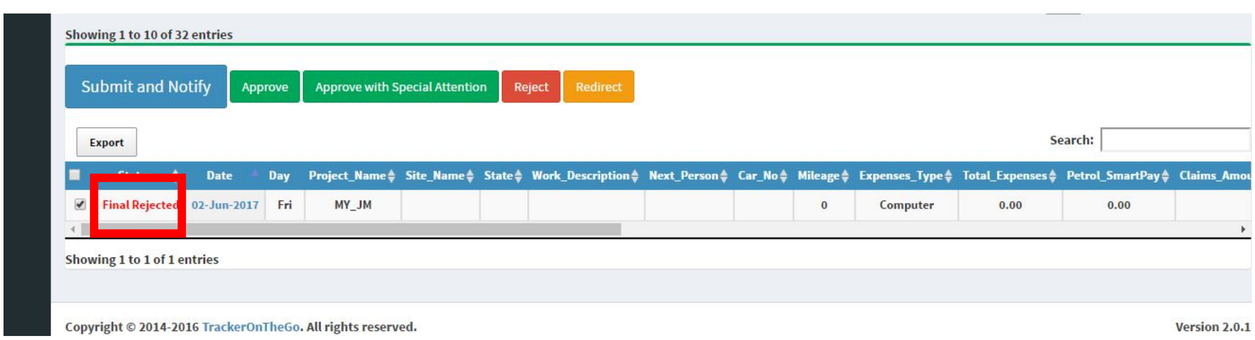




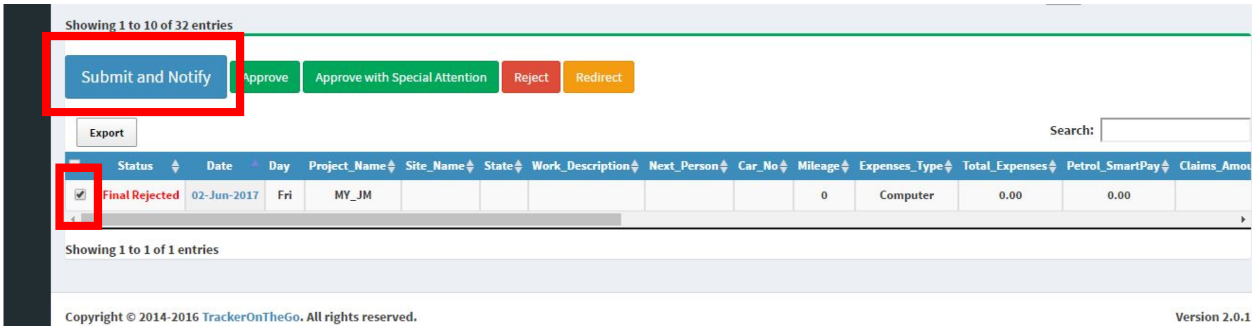
2. Then , click **Reject** button



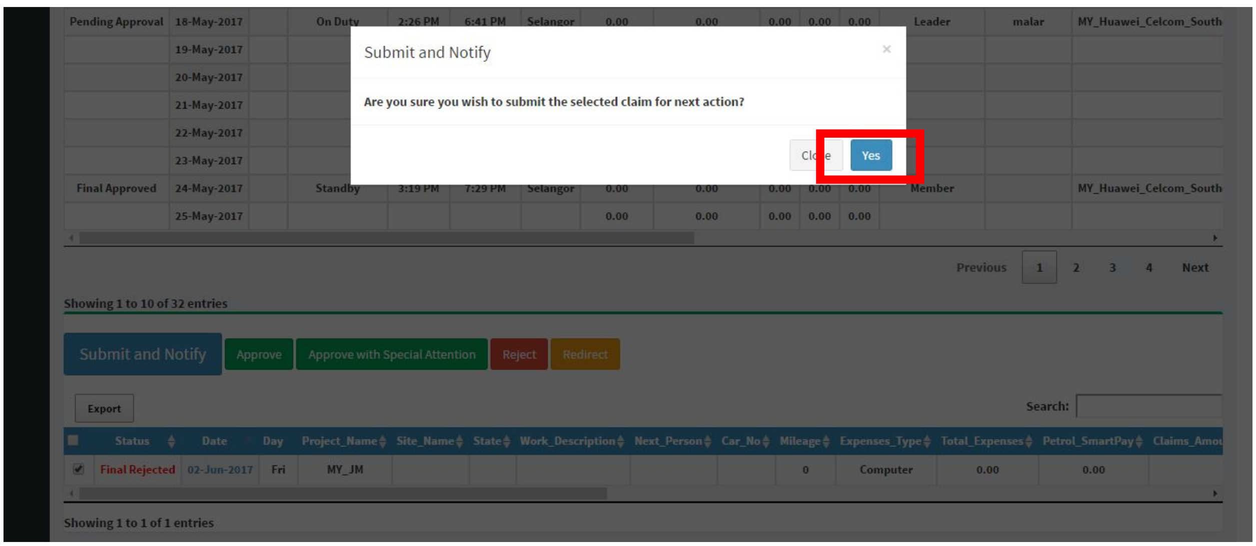
3. The status will change from **Pending > Rejected**



4. Tick on the rows you wish to proceed for next action and click **Submit and Notify**

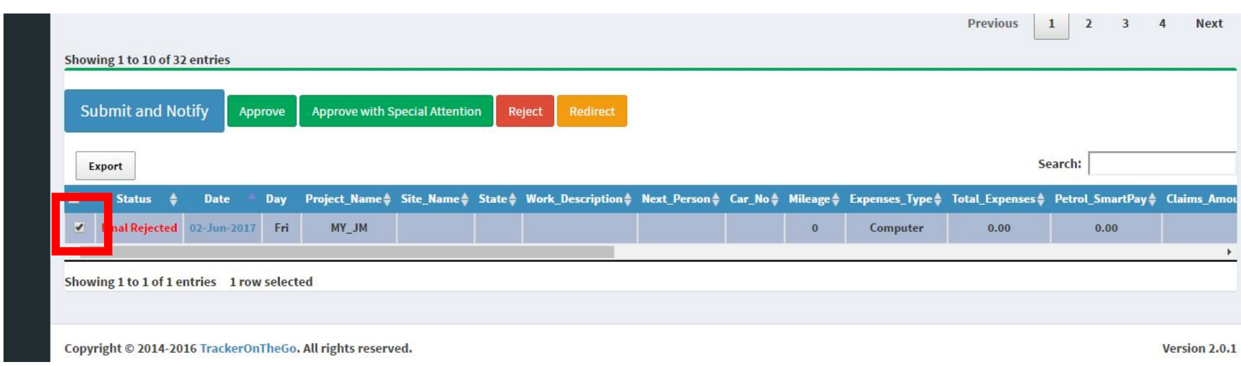


5. Click **Yes**

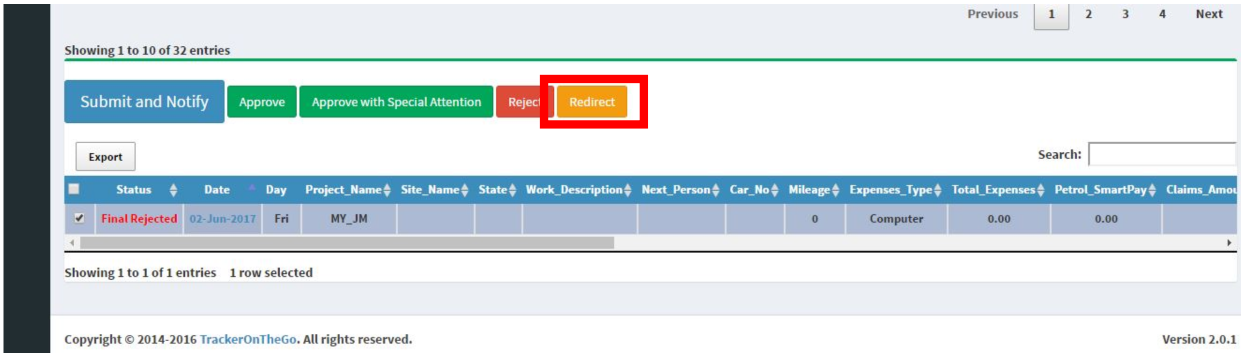


- How to redirect claim

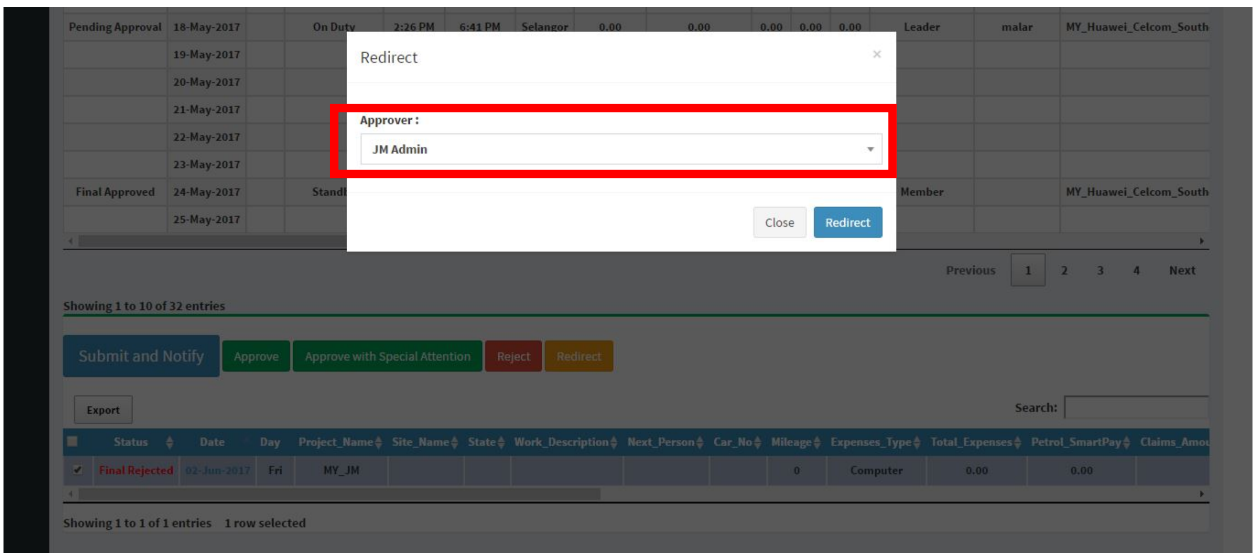
1. **Tick** the rows you wish to redirect



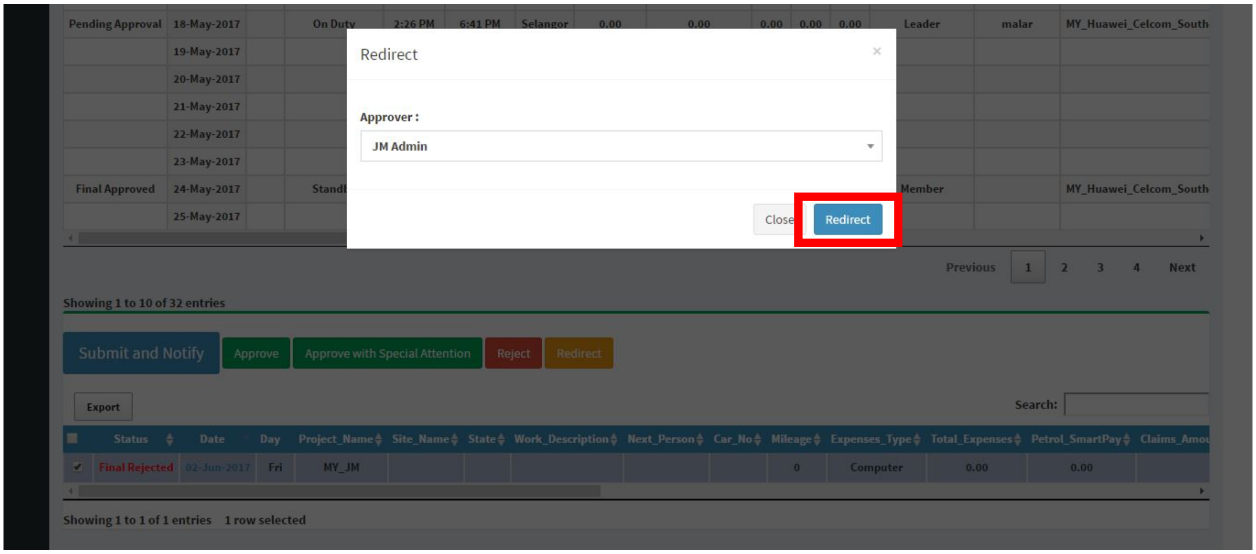
2. Click **Redirect** button



3. Choose another approver to be redirected



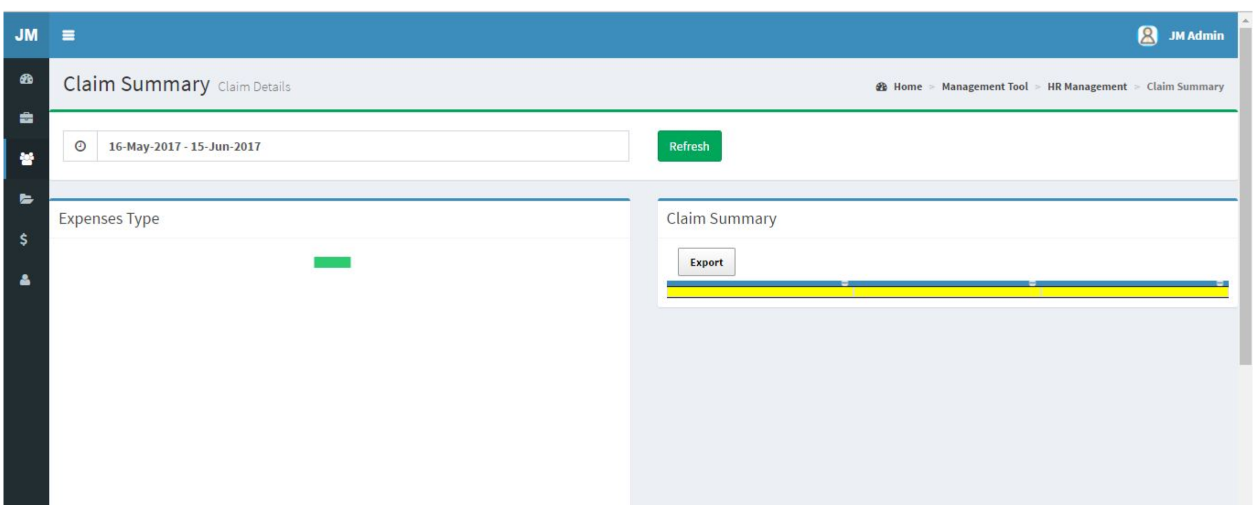
4. Click Redirect button



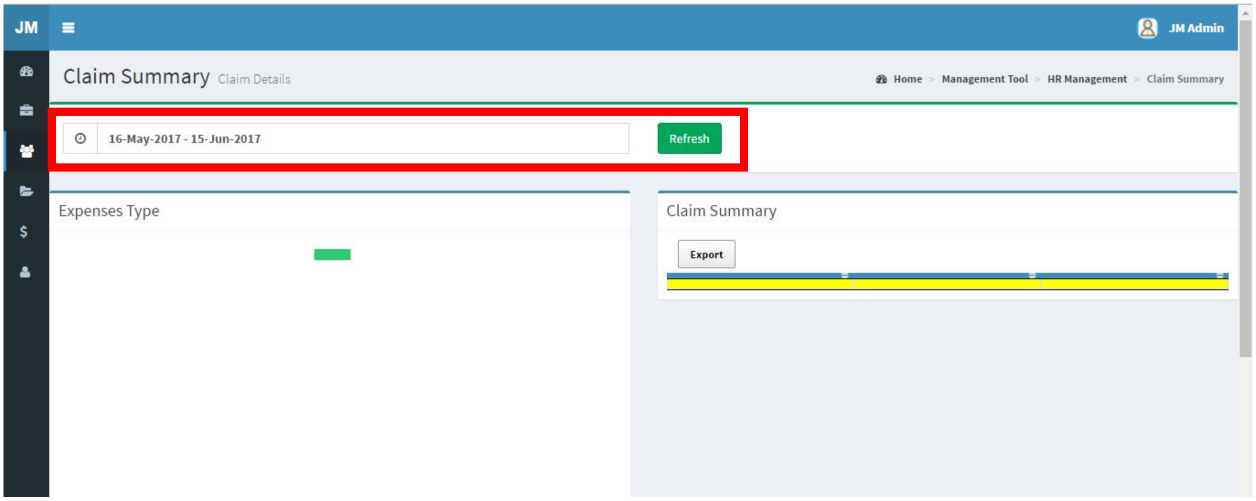
5. The claim is now redirected to the approver that you requested

➢ CLAIM SUMMARY

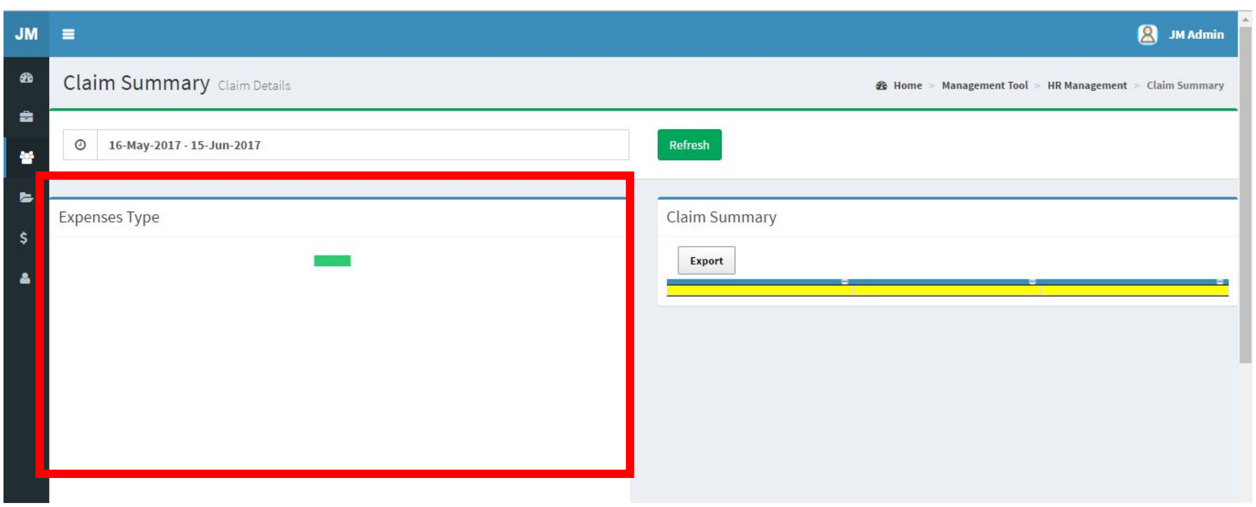
1. Click **Resource Management** > **Claim Summary**



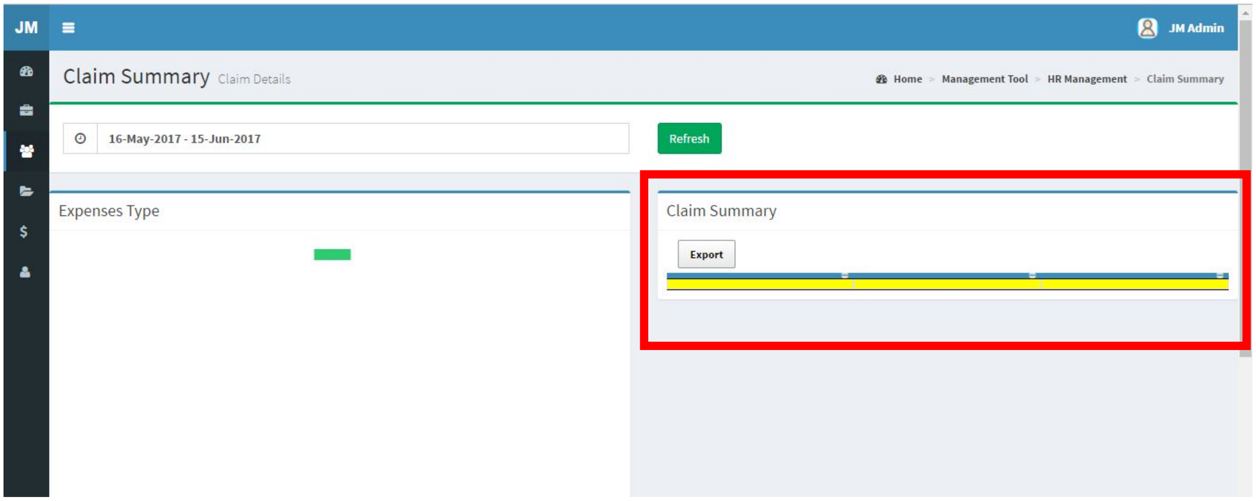
2. Filter the time sheet date from the Date Range Picker. Default view is set from 16th of current month to 15 of next month. Click **Refresh** button to retrieve timesheet on filtered date.



3. There will be:
   a) Summary for expenses type



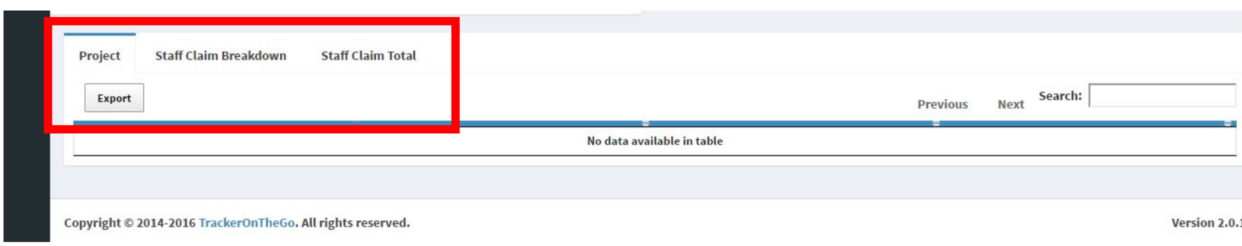
b) Claim summary which can be export to PDF or Excel form using **Export** button



c) Three types of summary:

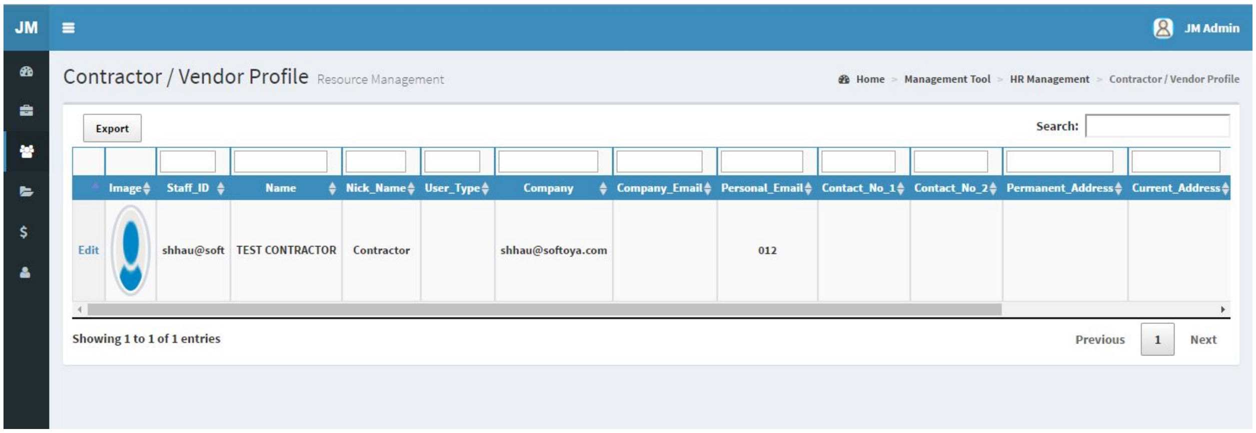
I. **Project**
II. **Staff Claim Breakdown**
III. **Staff Claim Total**

- All this three can be export to your choice of format either PDF or Excel

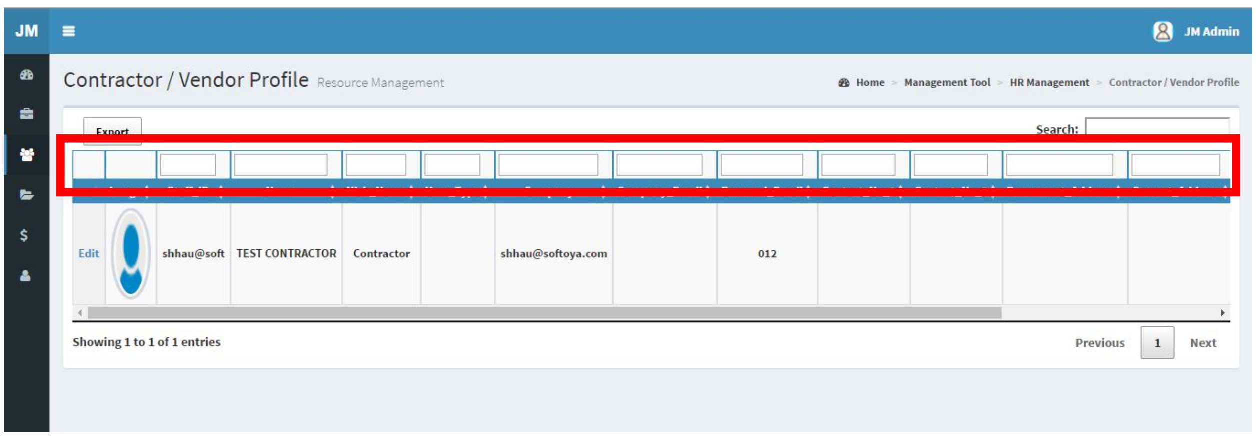


➢ CONTRACTOR PROFILE

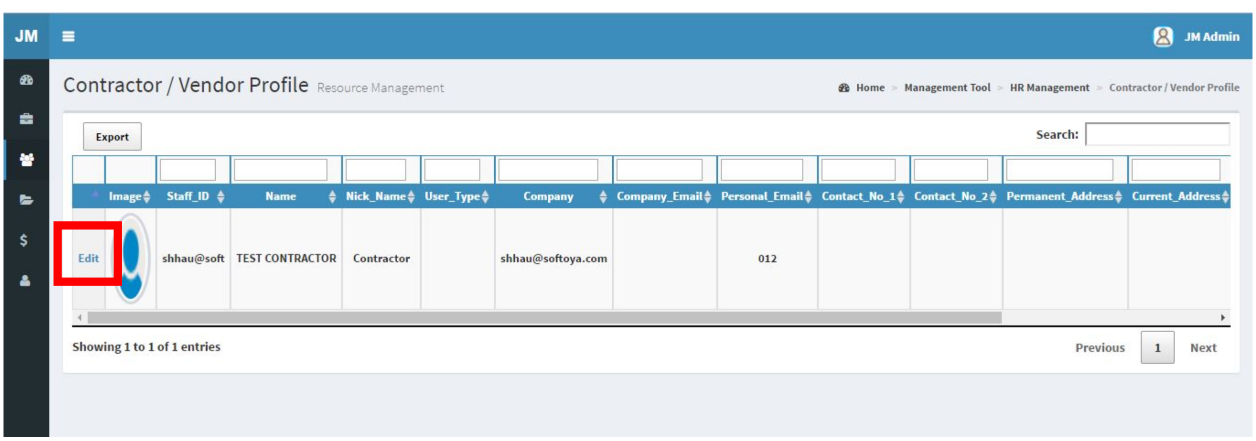
1. Click **Resource Management** > **Contractor Profile**



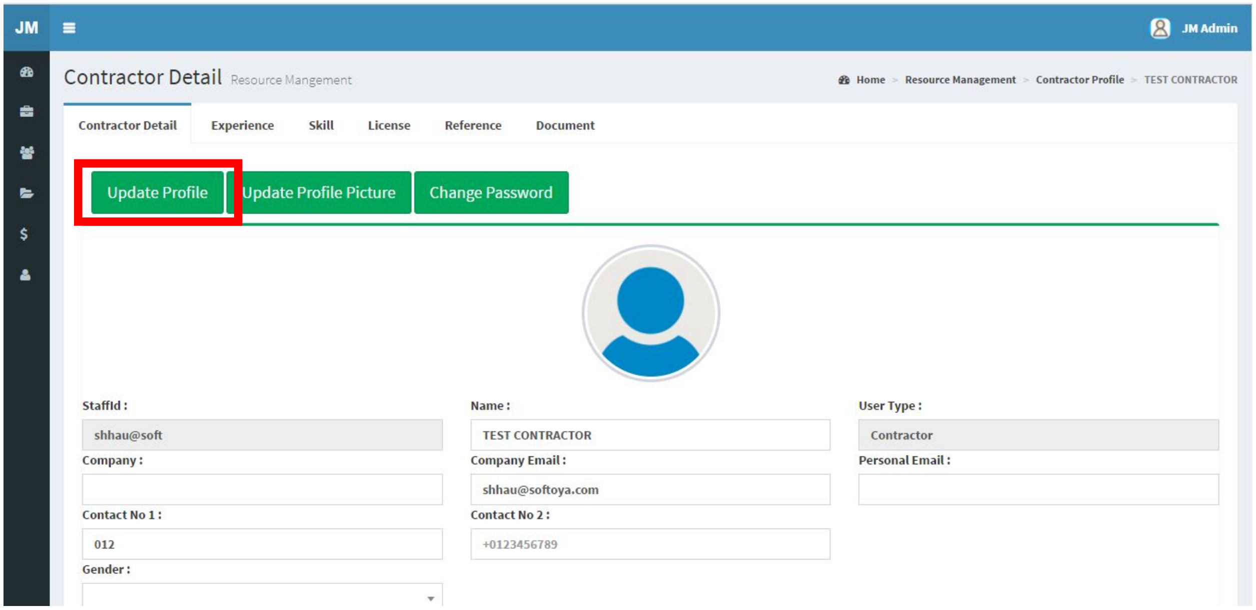
2. To search specific contractor or vendor name and details



3. Click **Edit** to update details in contractor or vendor

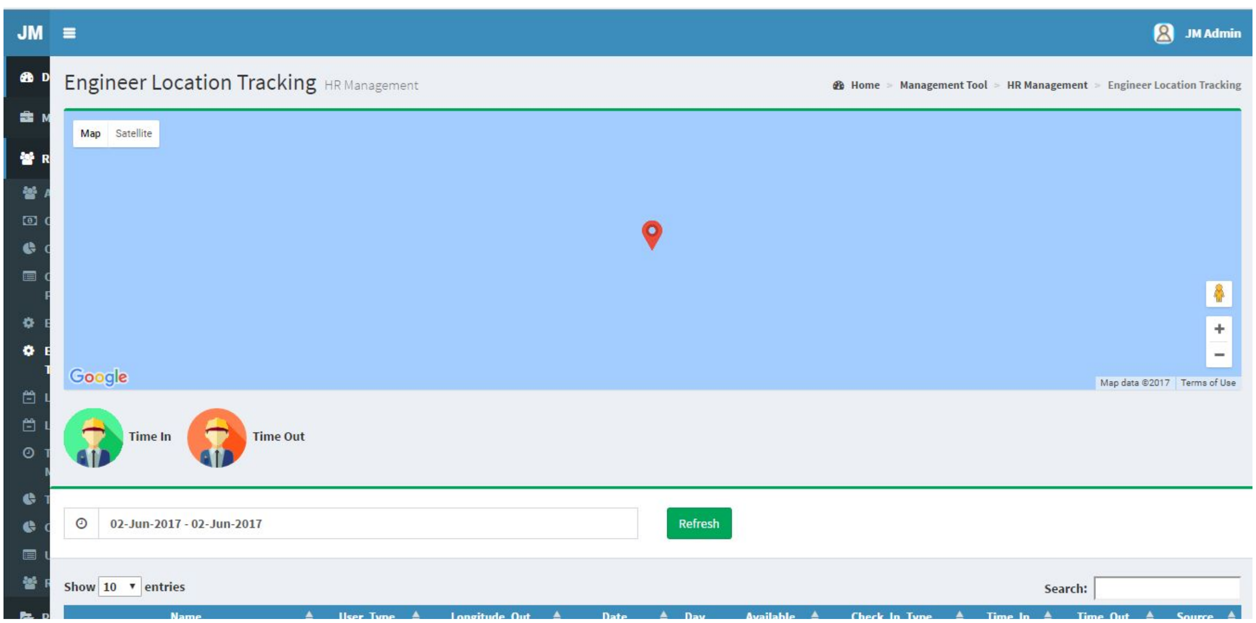


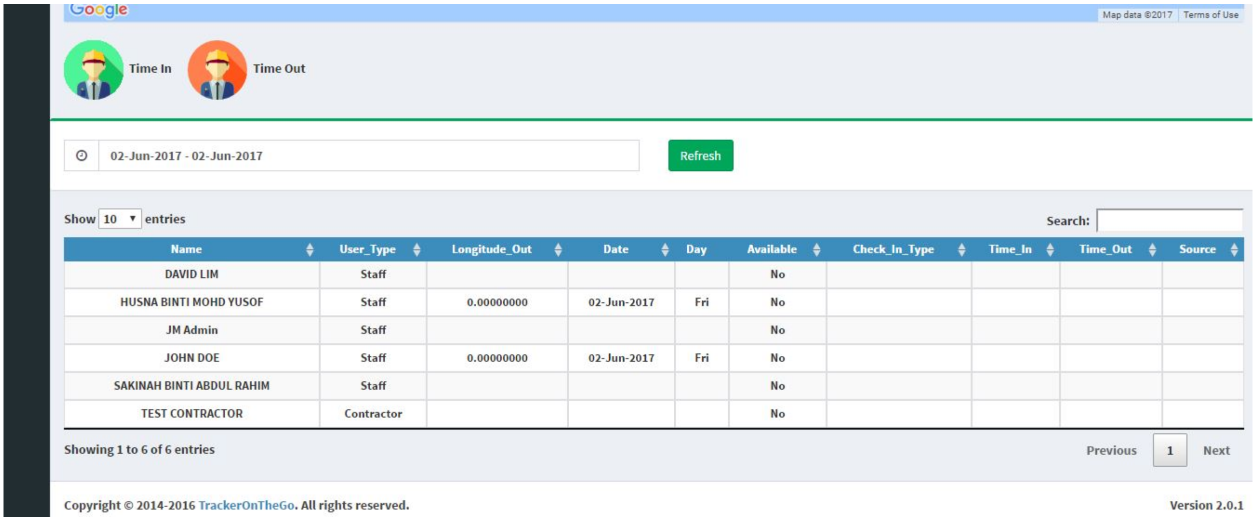
4. Enter those details and click **Update Profile** Button



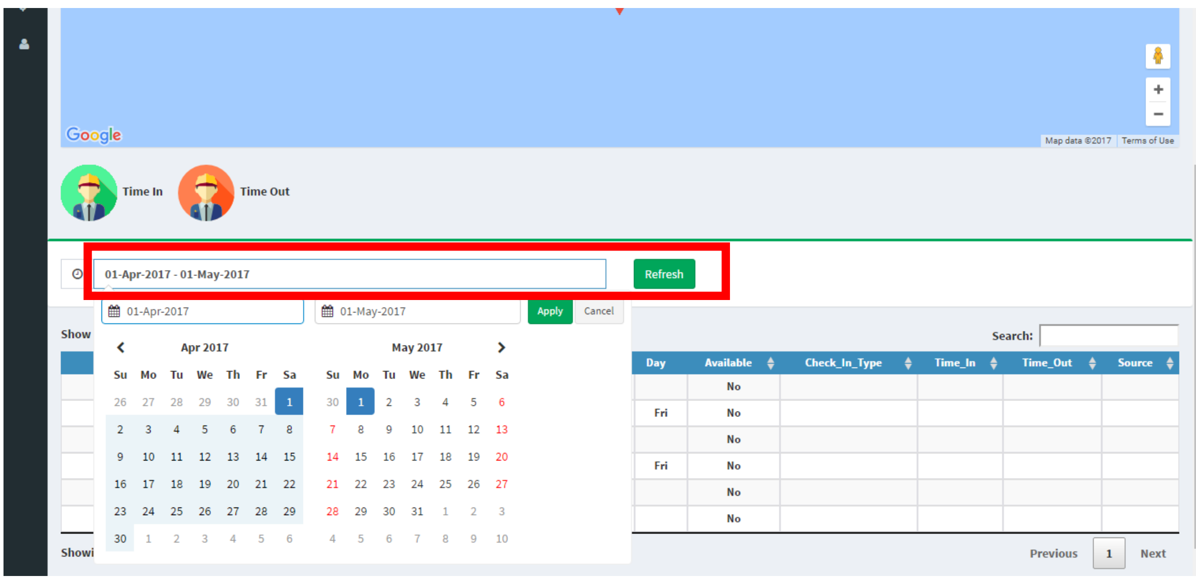
➢ ENGINEER LOCATION TRACKING

1. Click **Resource Management** > **Engineer Location Tracking**

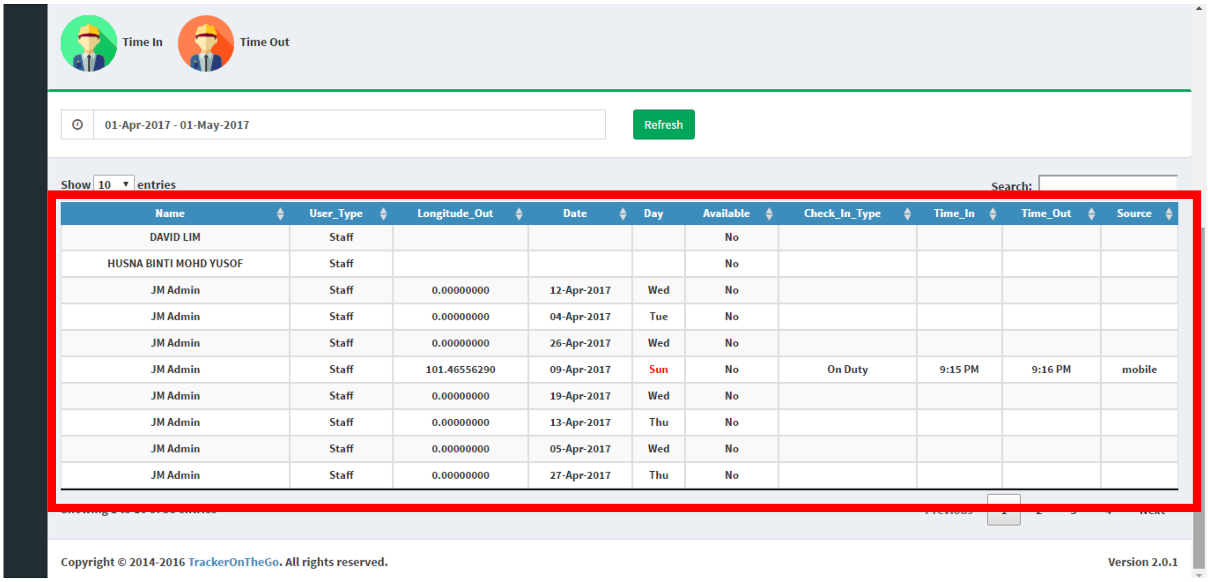




2. Select date from the date range picker and click **Refresh.**

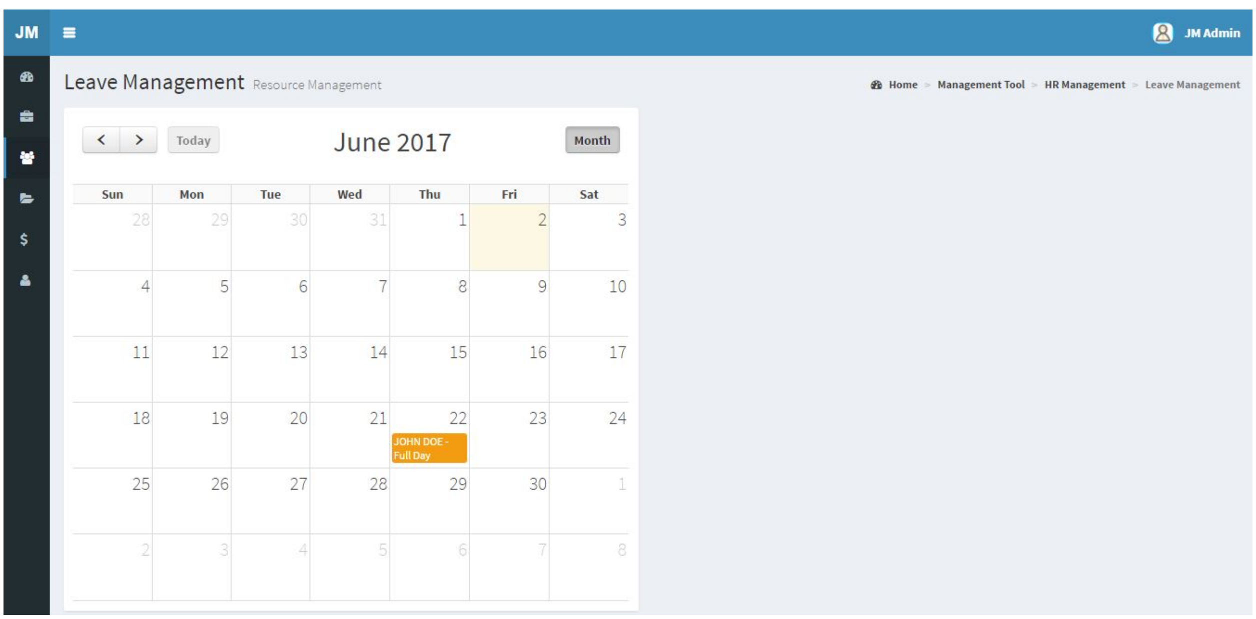


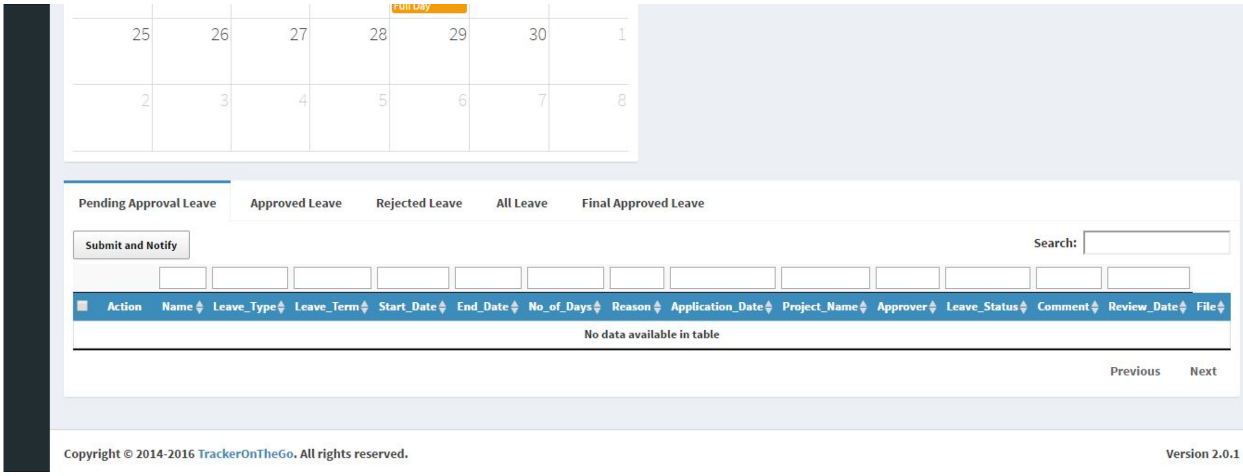
3. Details of engineer location tracking can be viewed



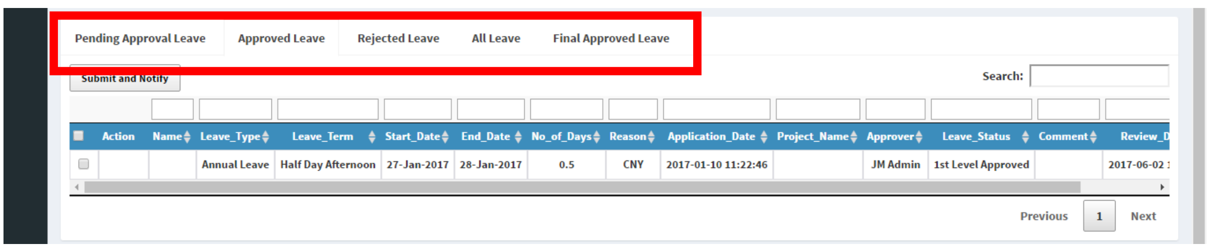
➢ LEAVE MANAGEMENT

1. Click **Resource Management** > **Leave Management**



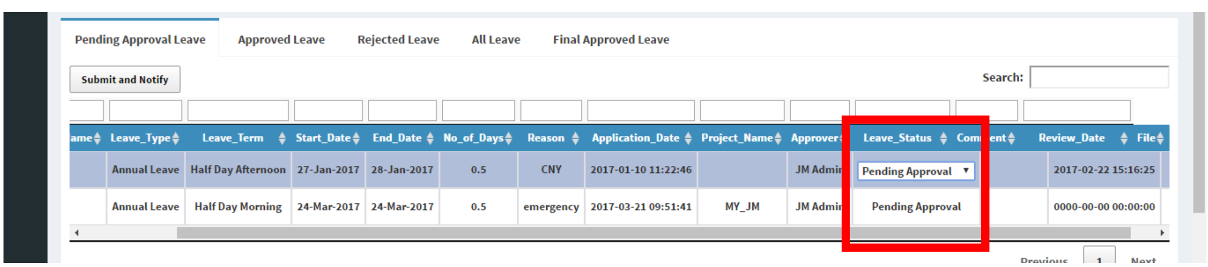


2. Click these columns to see the details

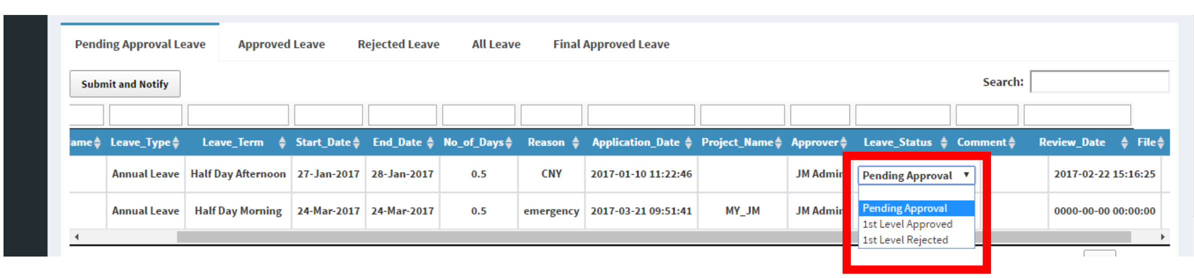


- How to Approve Leave

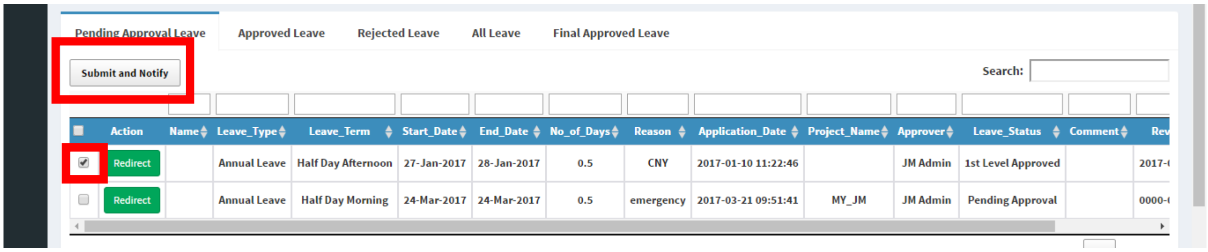
1. Go to **Leave_Status** column



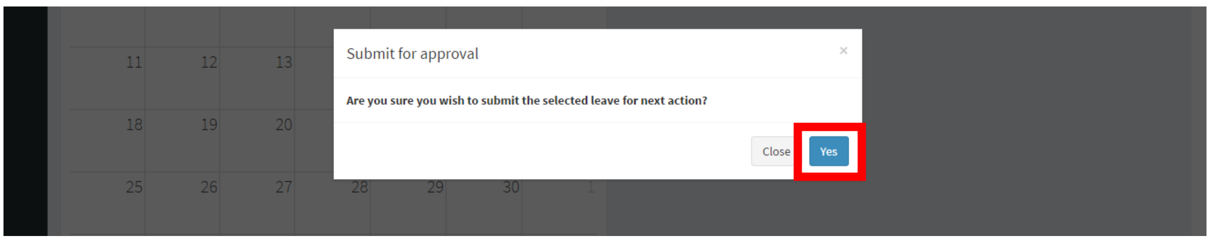
2. Click on it to change it to 1st Level Approved. (The numeric will change according to your level of approval)



3. **Tick** on the row that leave status have been changed
4. Then, click **Submit and Notify**



5. Click **Yes**

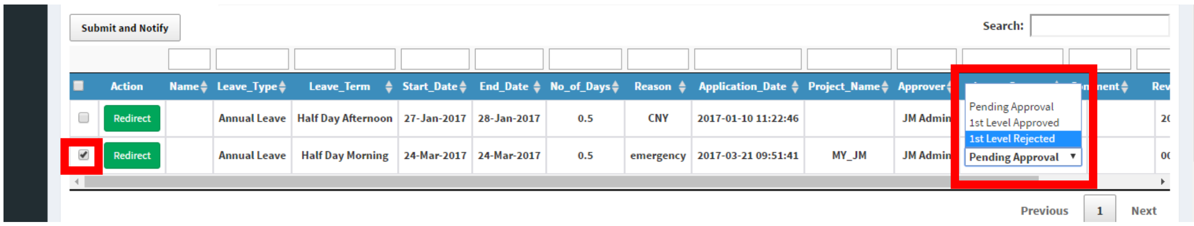


6. (The request will be proceeded to next approver. Similar steps applied for all the approval level and up to the final approver.)

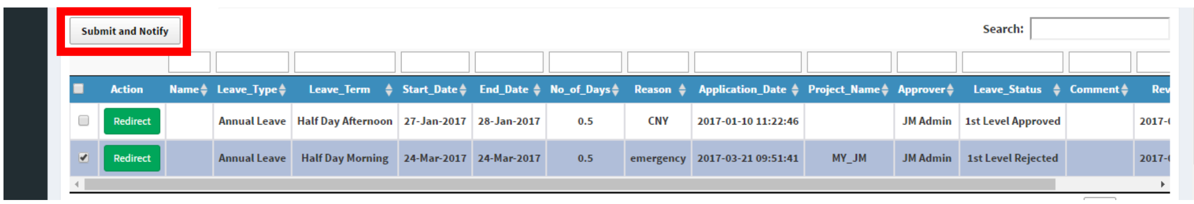
<u>- How to Reject Leave</u>

1. Go to **Leave_Status** Column

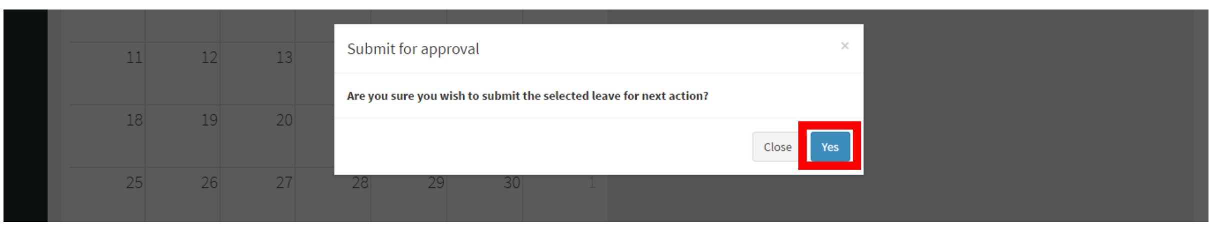
2. Change the status to rejected and **tick** on the row that leave status have been changed



3. Click **Submit and Notify**



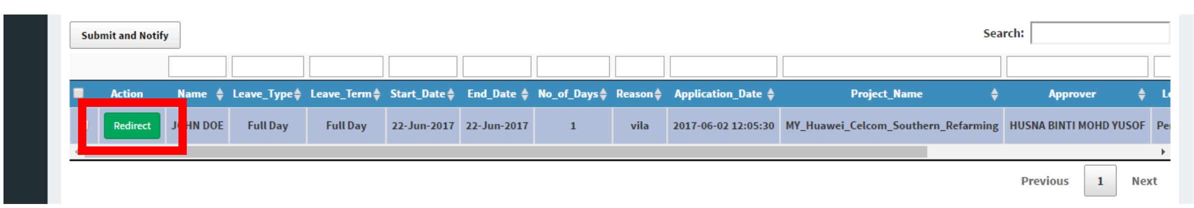
4. Click **Yes**



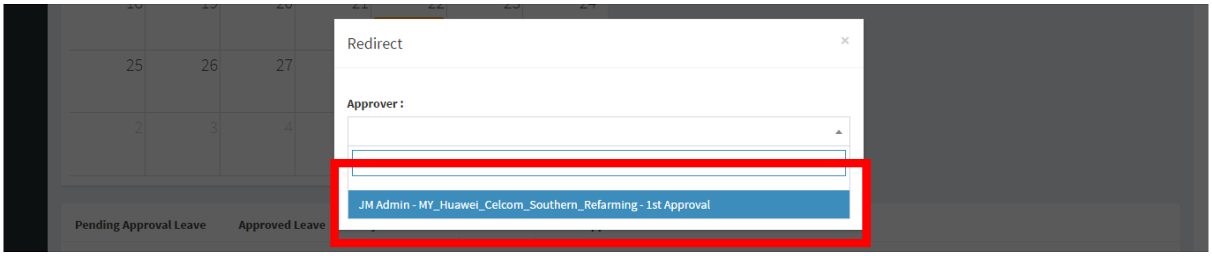
- How to Redirect Leave

1. **Tick** on the column of leave that you wish to redirect

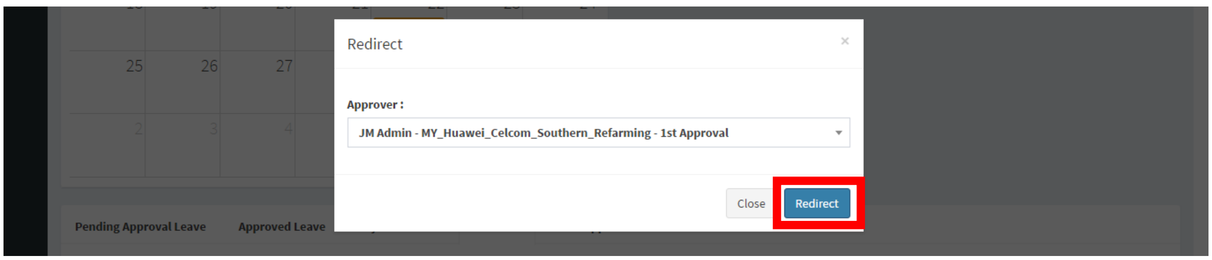
2. Click **Redirect** button



3. Choose your approver

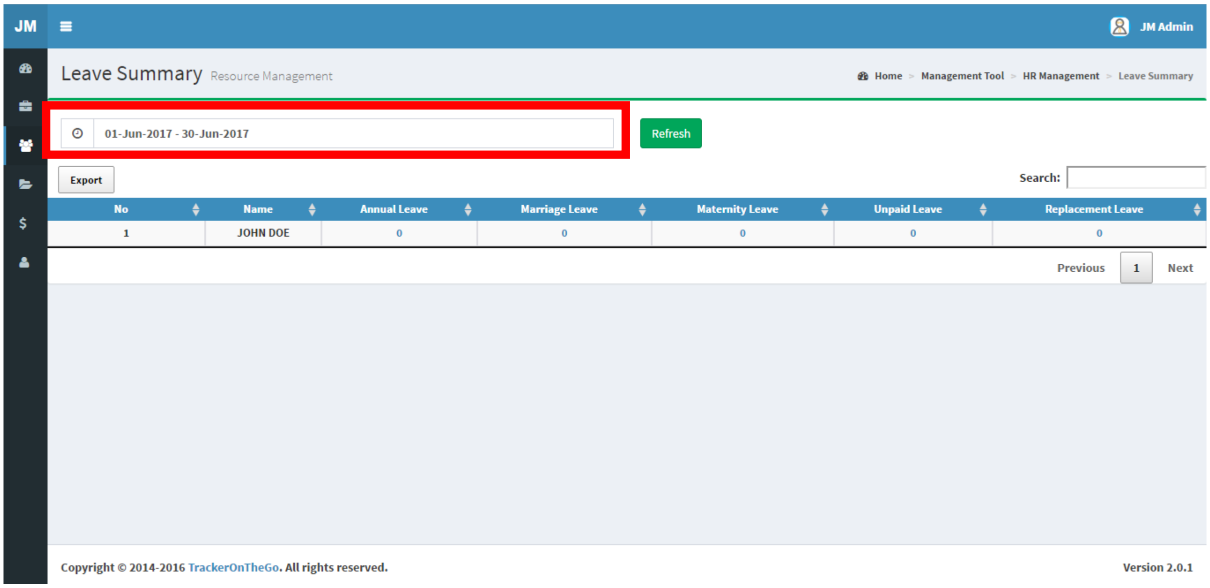


4. Click **Redirect**

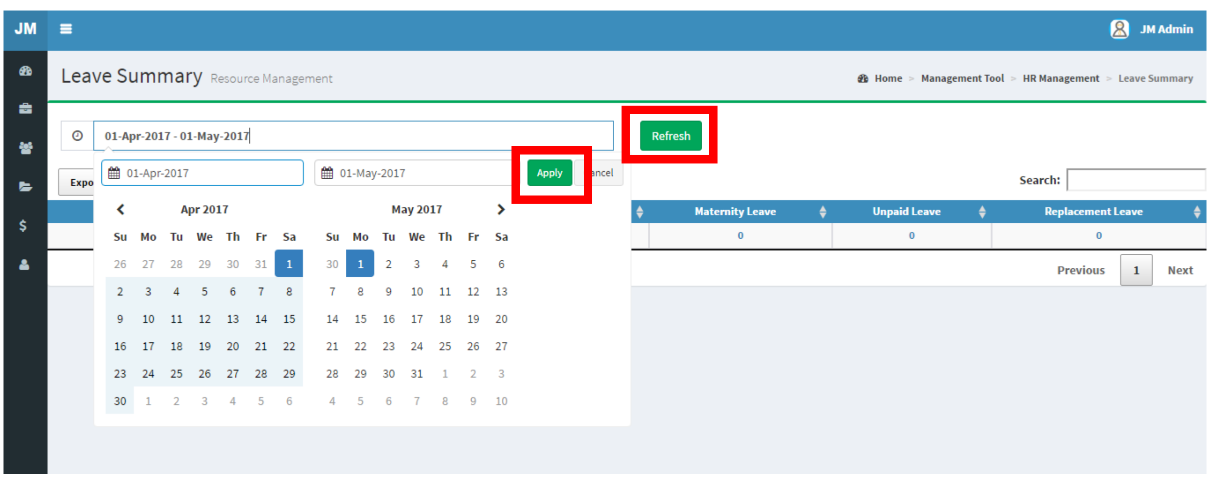


➢ LEAVE SUMMARY

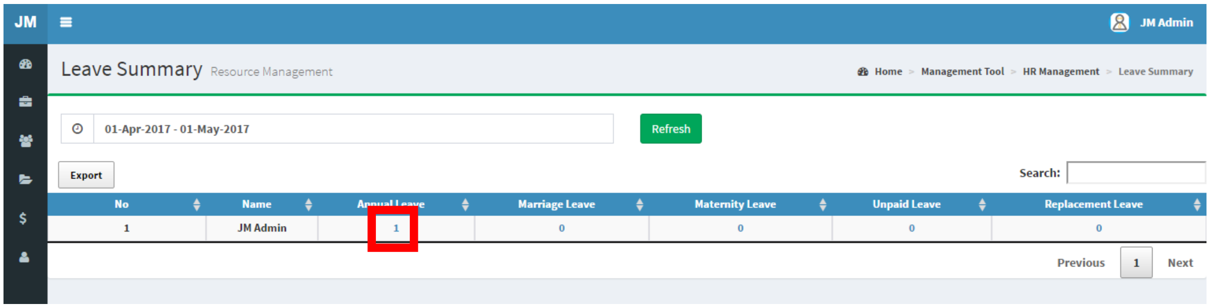
1. Click **Resource Management** > **Leave Summary**

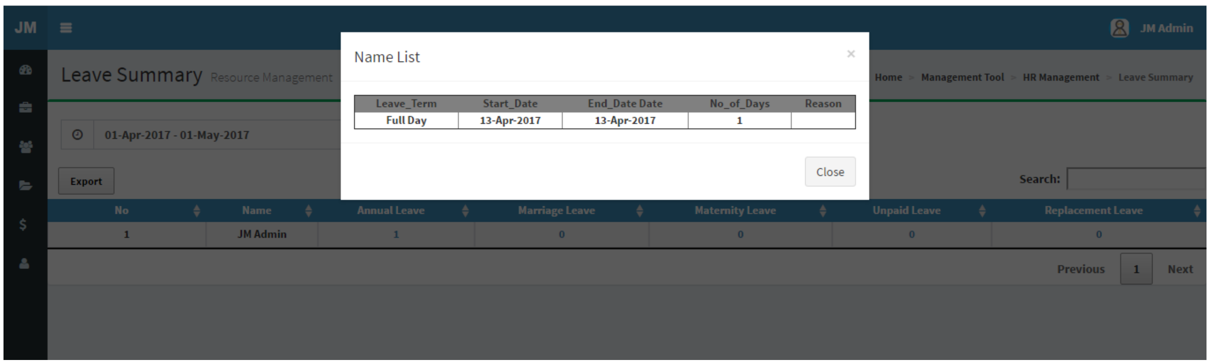


1. To change date, click on the **date ranger column**.
2. Choose your date
3. Click **Apply** button > **Refresh** button



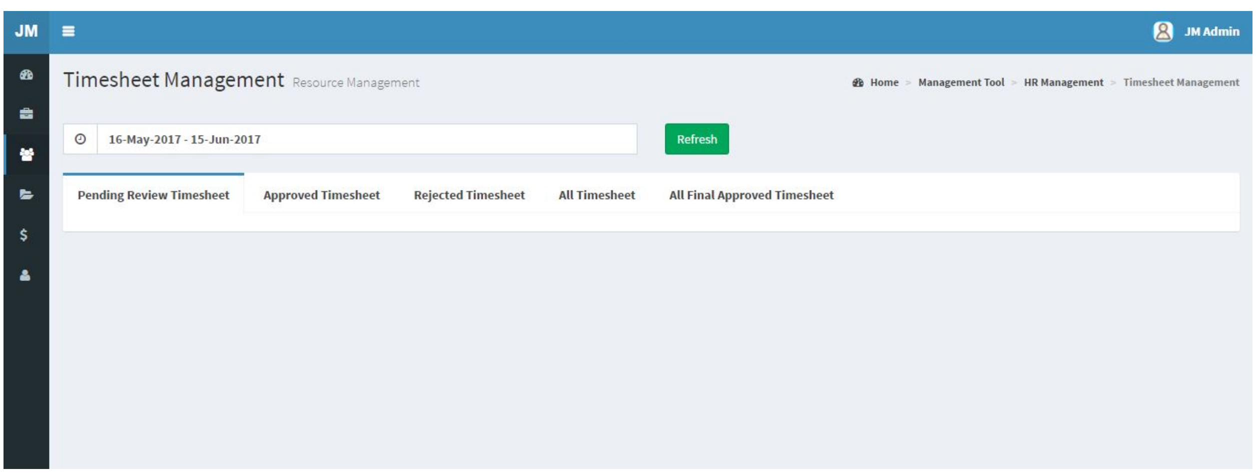
4. **Click on the number** to see the details



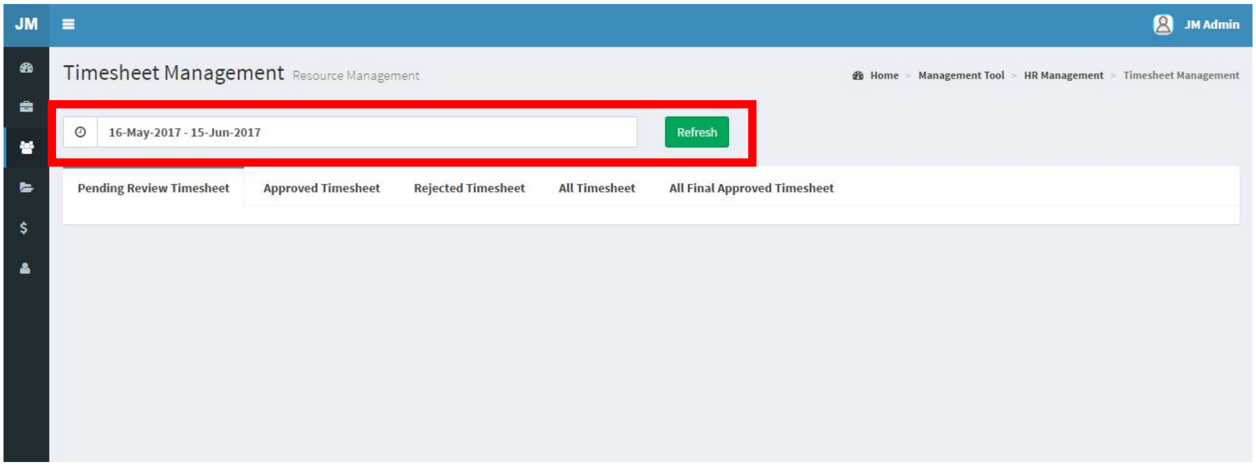


➢ TIMESHEET MANAGEMENT

1. Click **Resource Management** > **Timesheet Management**

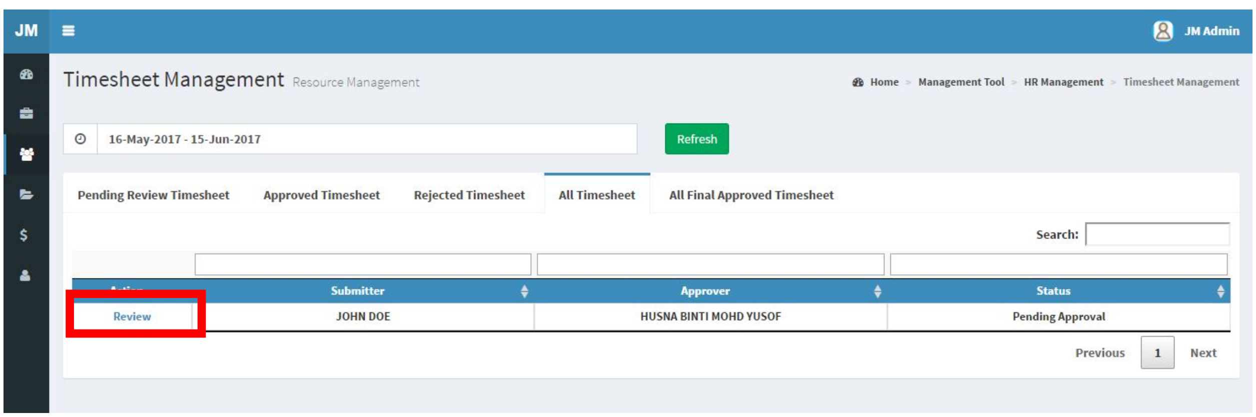


2. Filter the time sheet date from the Date Range Picker. Default view is set from 16^{th} of current month to 15 of next month. Click **Refresh** button to retrieve timesheet on filtered date.

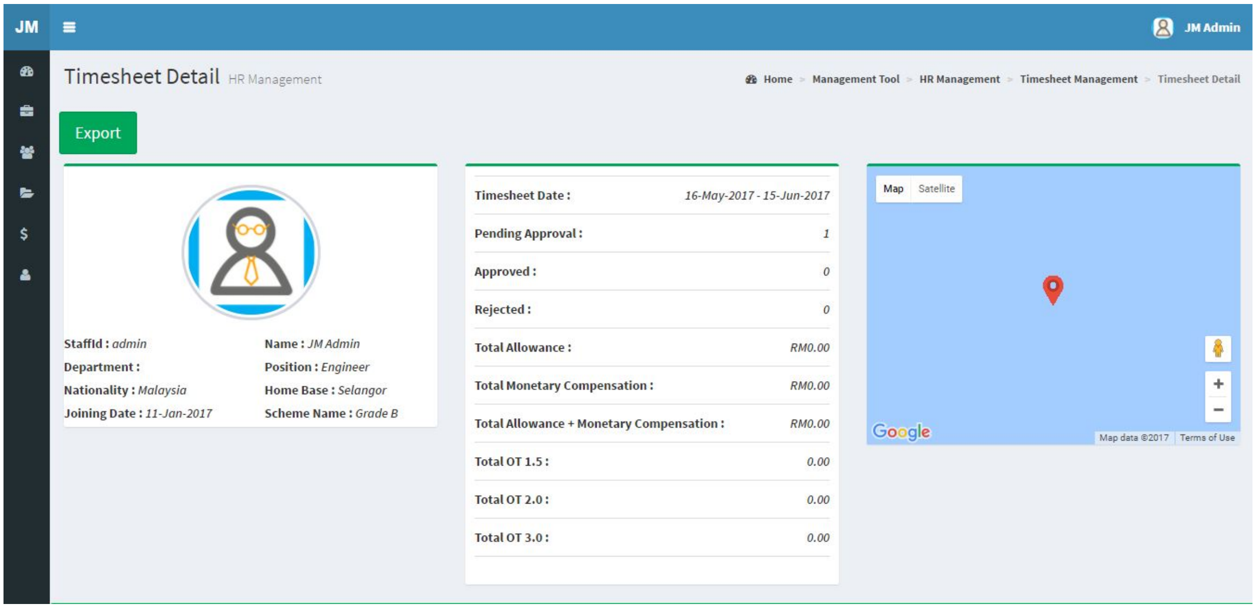


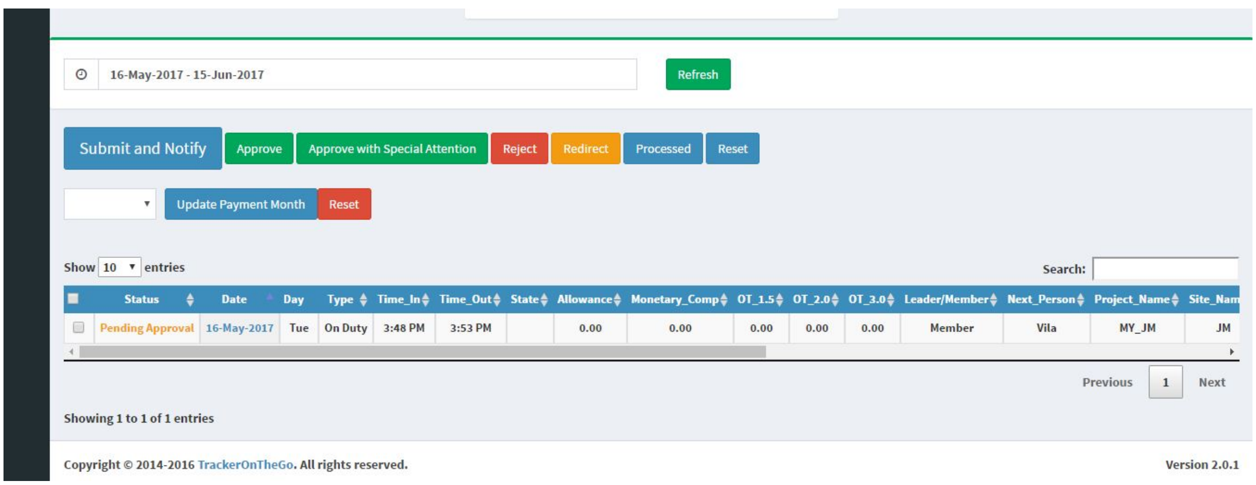
- How to Approve Timesheet

3. Click **Pending Review Timesheet** to view pending timesheet
   a) Click **Review** on the selected row

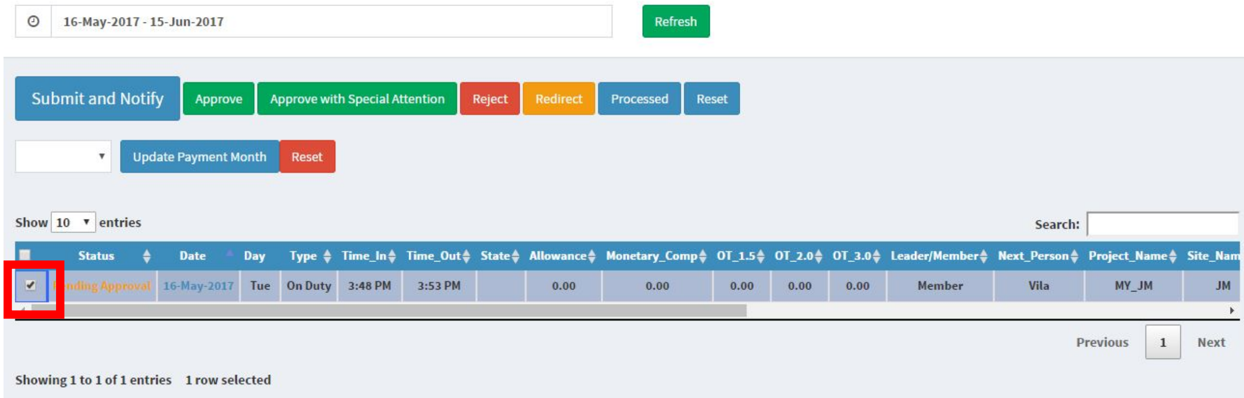


b) Scroll down to view pending timesheet

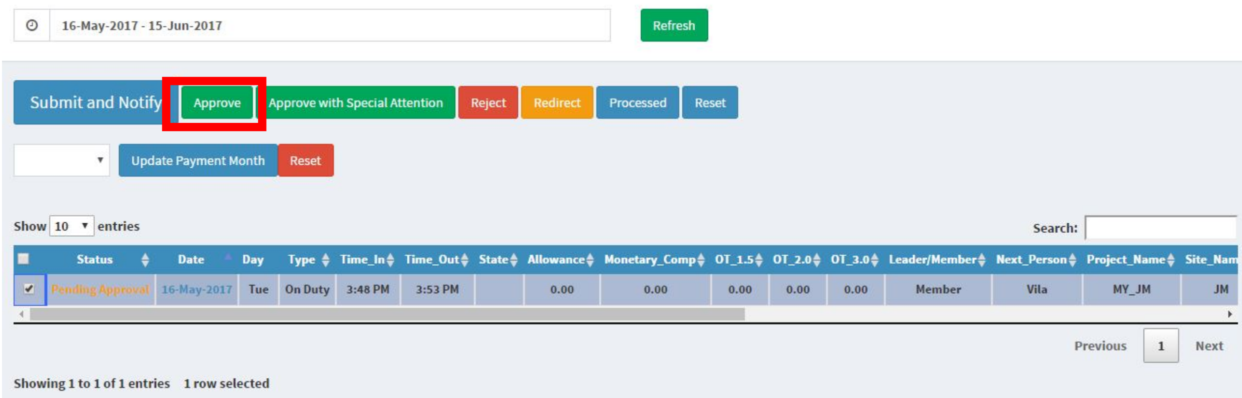




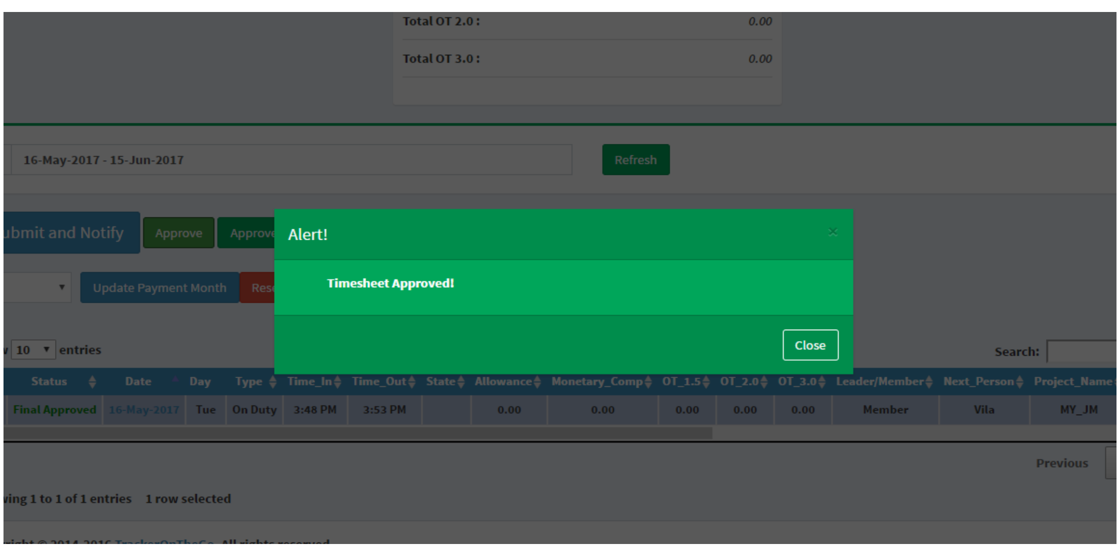
c) **Tick** on the row that need to be approve



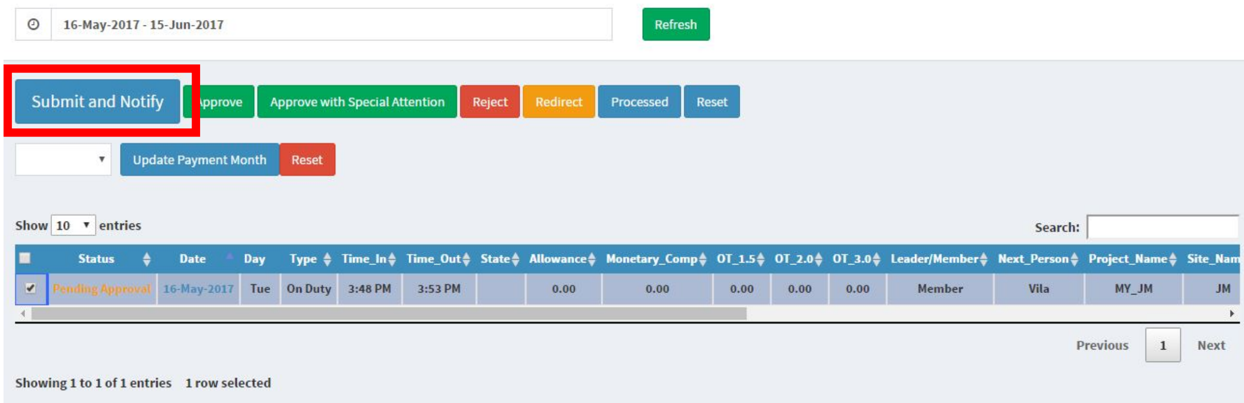
d) Click **Approve** button



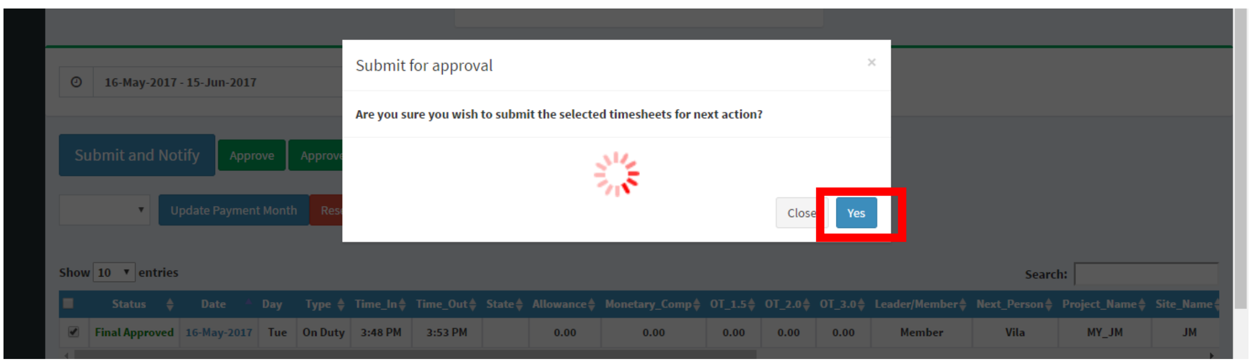
e) Successful alert will have popped out



f) Then, click the **Submit** button



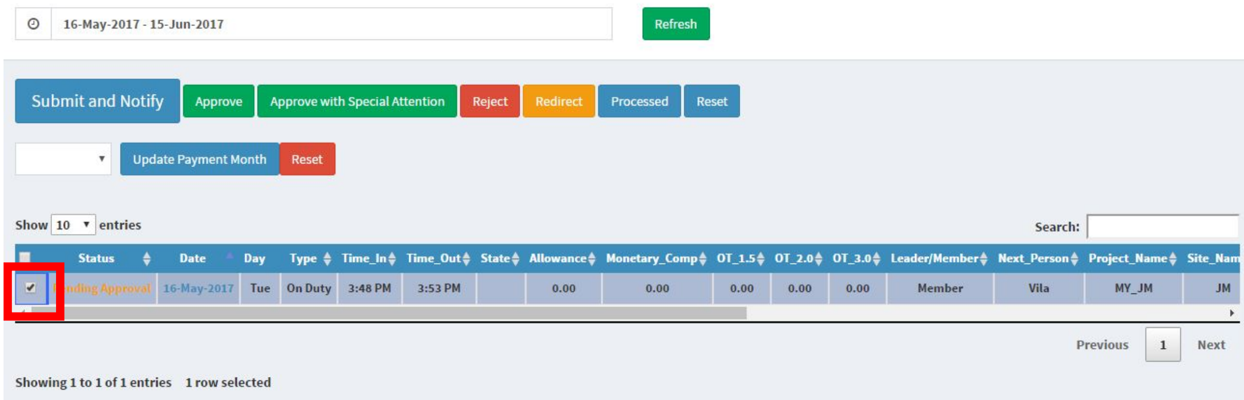
g) Click **Yes**



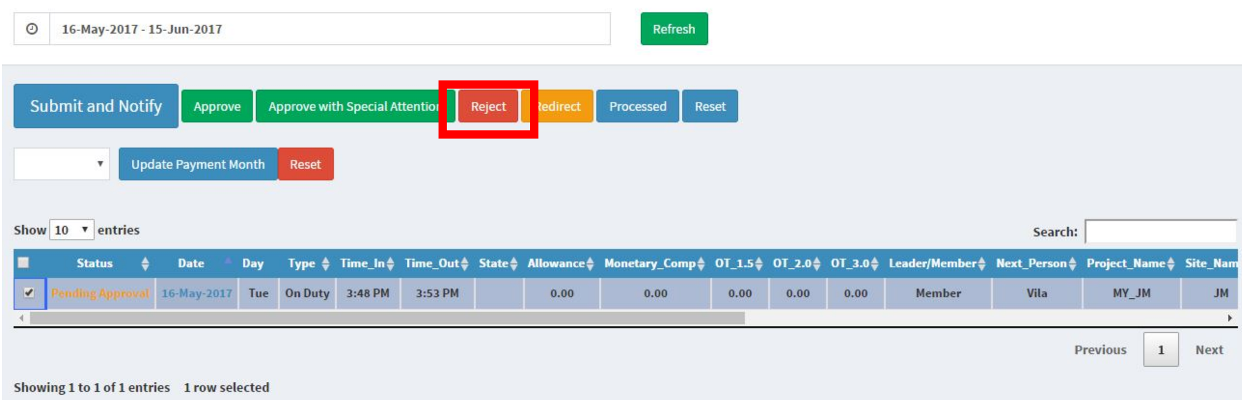
h) Successful alert will have popped out

- How to Reject Timesheet

a) **Tick** on the row to be reject

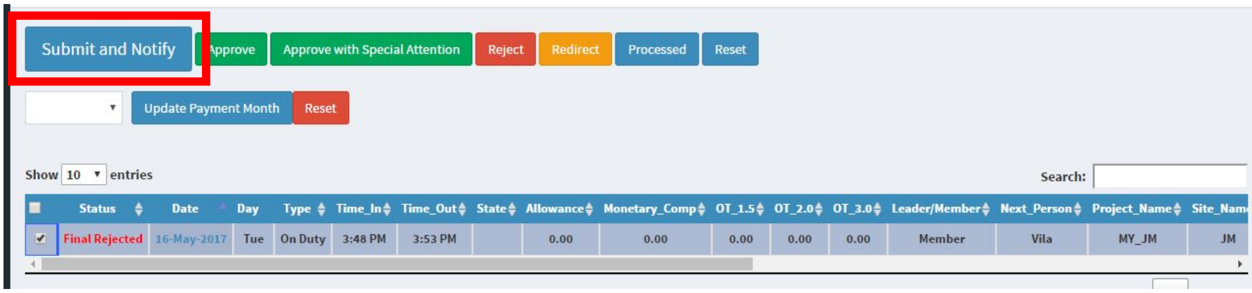


b) Click **Reject** button

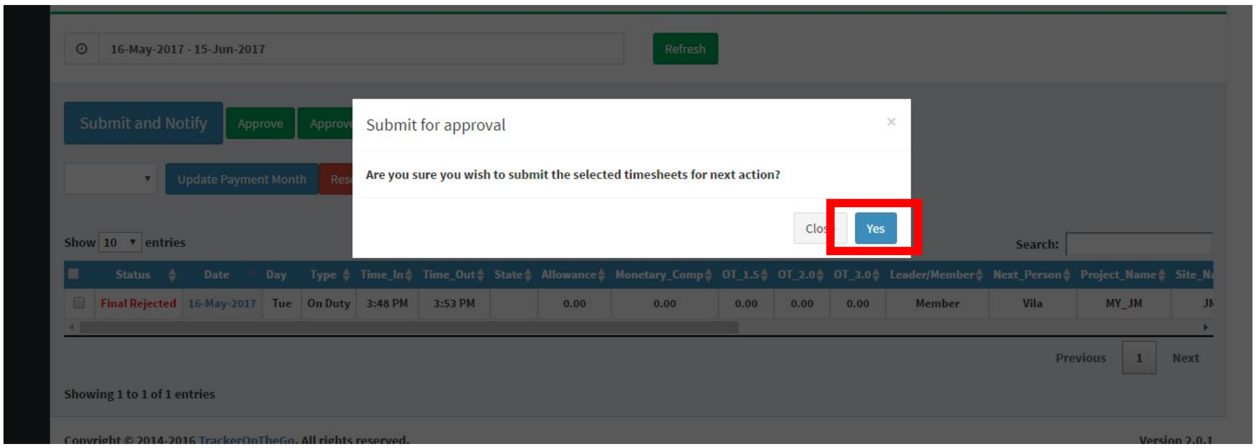


c) The status will change to **Final Rejected**

d) **Tick** the checkbox and click **Submit** button

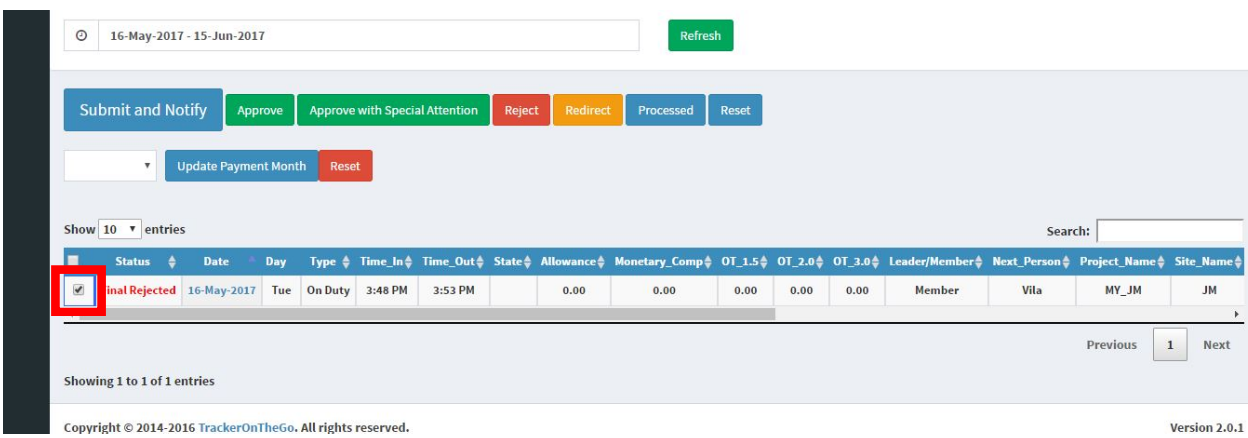


e) Click **Yes** button

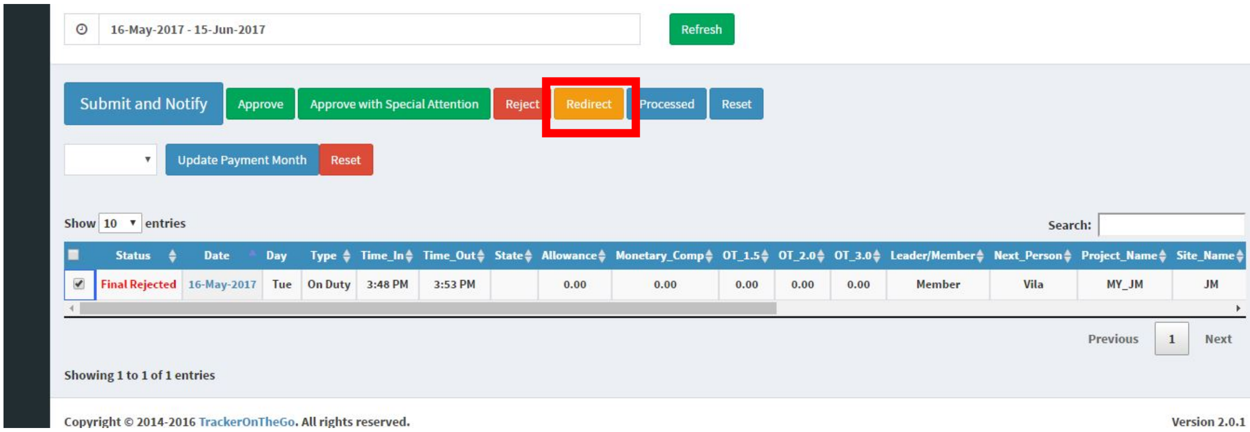


- How to Redirect Timesheet

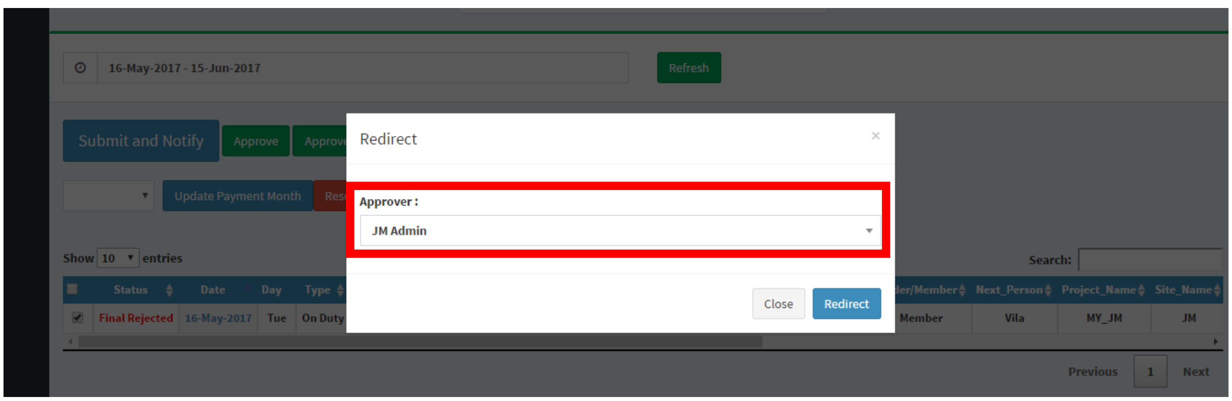
a) **Tick** on the row you wish to redirect



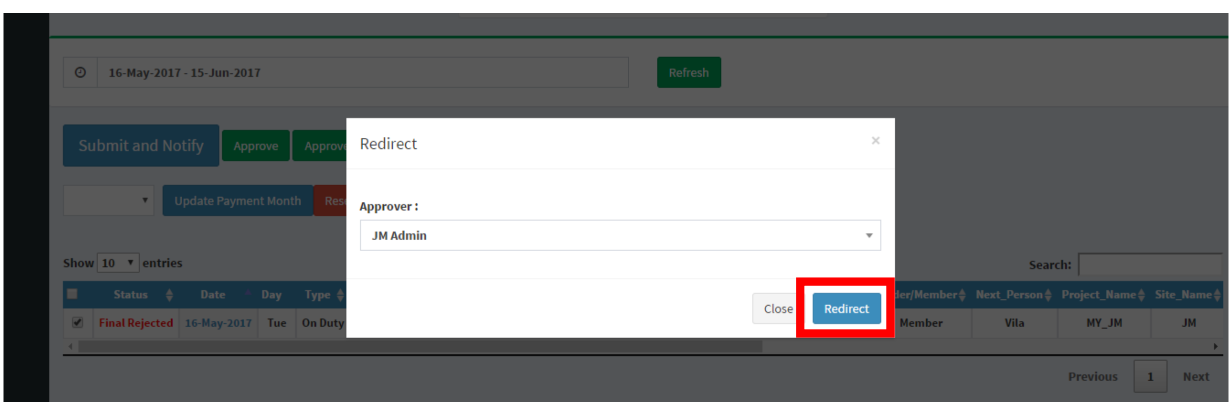
b) Click **Redirect** button



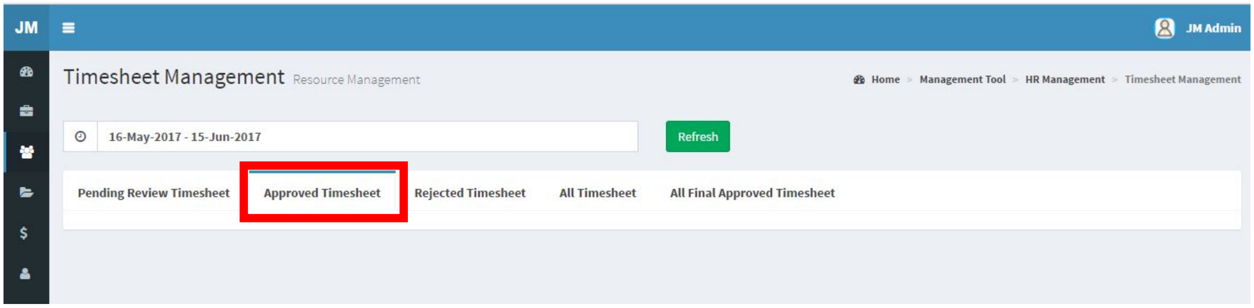
c) Choose another approver to be redirect



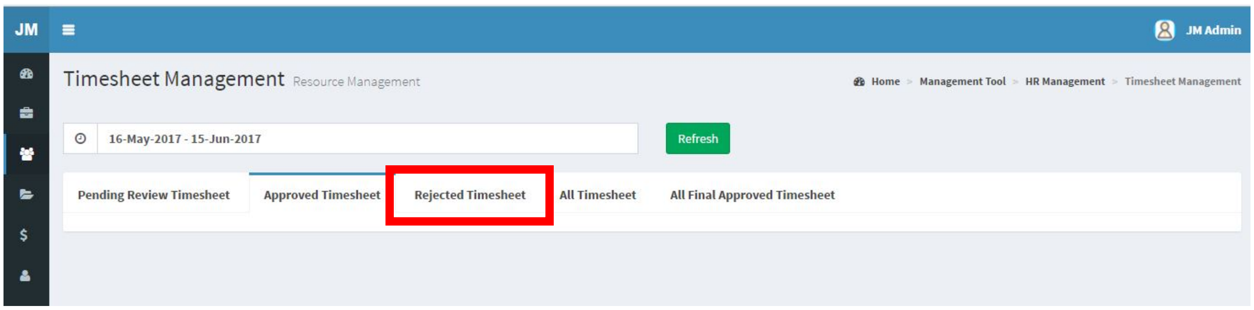
d) Click **Redirect** button
(The request will go to other approver and you are not able to see the request anymore)



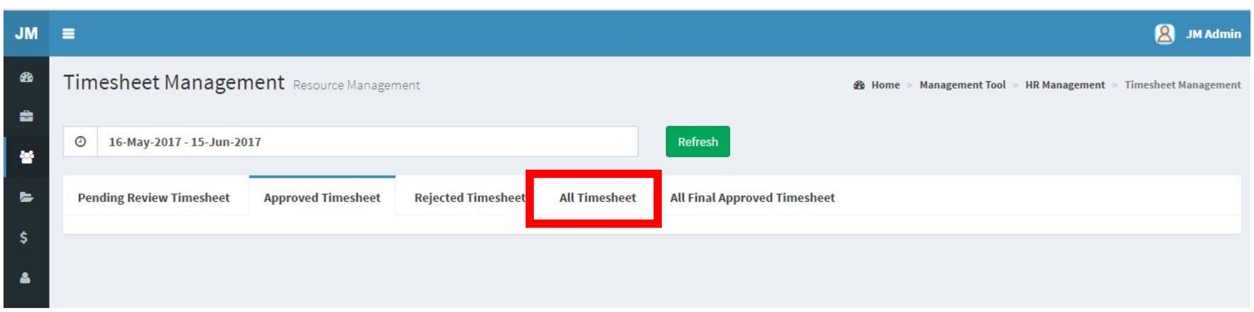
4. **Approved Timesheet** tab is to view those timesheet that been approve



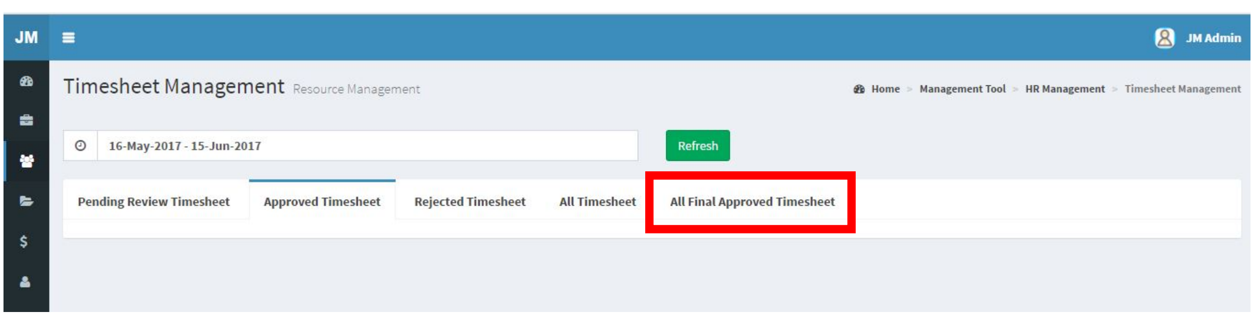
5. **Rejected Timesheet** is to view those timesheet that been rejected



6. **All Timesheet** tab is to view all type of timesheet either: approved or rejected

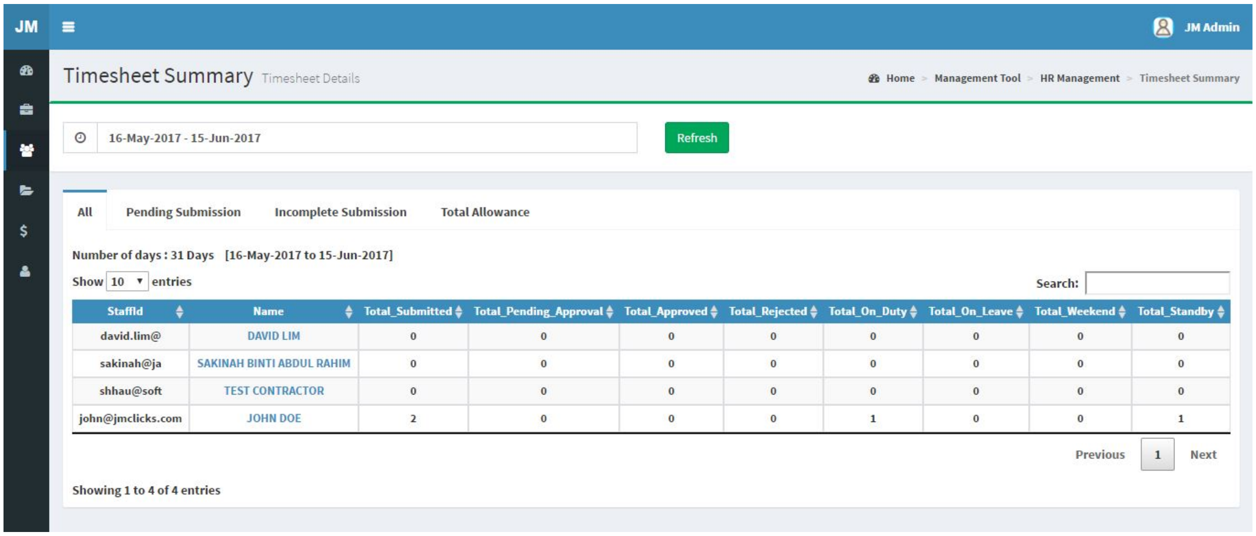


7. **All Final Approved Timesheet** tab is to view the timesheet that been already approved by the final approver

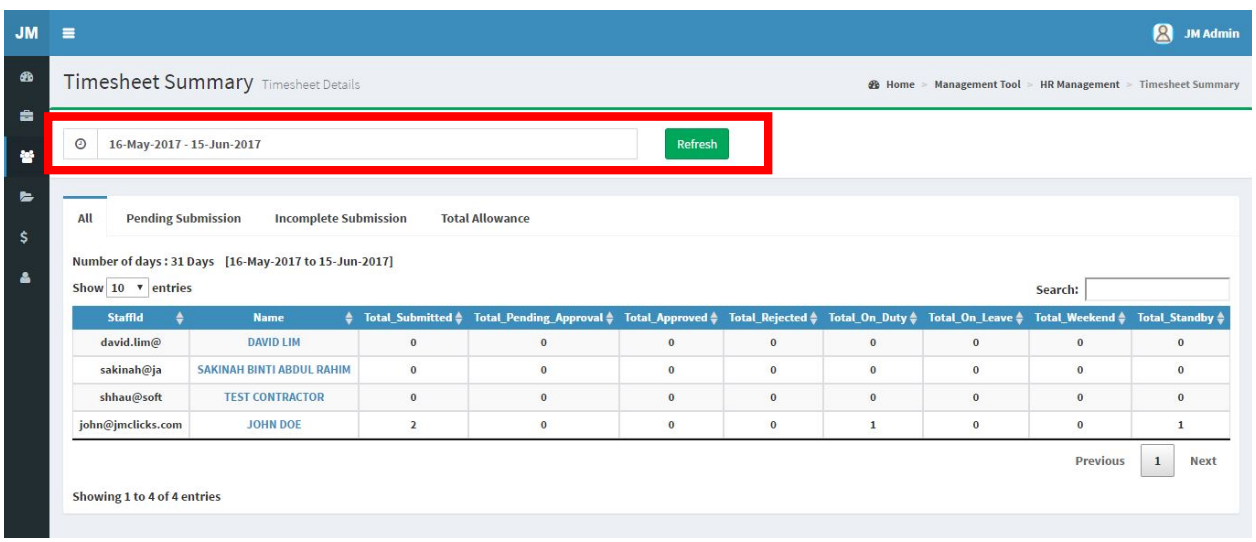


➢ TIMESHEET SUMMARY

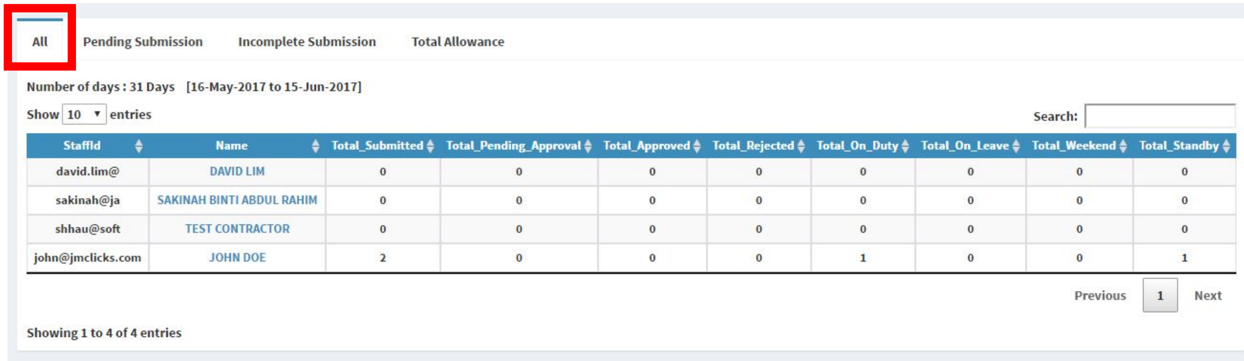
1. Click **Resource Management** > **Timesheet Summary**



2. Filter the time sheet date from the Date Range Picker. Default view is set from 16th of current month to 15 of next month. Click **Refresh** button to retrieve timesheet on filtered date.



3. **All** tab will be showing overall summary



All | Pending Submission | Incomplete Submission | Total Allowance

Number of days : 31 Days [16-May-2017 to 15-Jun-2017]

Show 10 entries

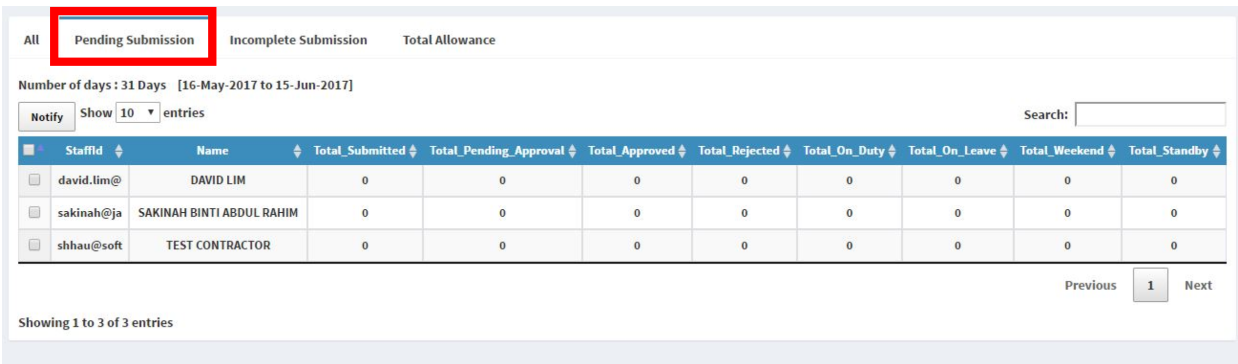
Search:

StaffId	Name	Total_Submitted	Total_Pending_Approval	Total_Approved	Total_Rejected	Total_On_Duty	Total_On_Leave	Total_Weekend	Total_Standby
david.lim@	DAVID LIM	0	0	0	0	0	0	0	0
sakinah@ja	SAKINAH BINTI ABDUL RAHIM	0	0	0	0	0	0	0	0
shhau@soft	TEST CONTRACTOR	0	0	0	0	0	0	0	0
john@jmclicks.com	JOHN DOE	2	0	0	0	1	0	0	1

Previous 1 Next

Showing 1 to 4 of 4 entries

4. **Pending submission** will be showing summary for the count of pending summary



All | Pending Submission | Incomplete Submission | Total Allowance

Number of days : 31 Days [16-May-2017 to 15-Jun-2017]

Notify Show 10 entries

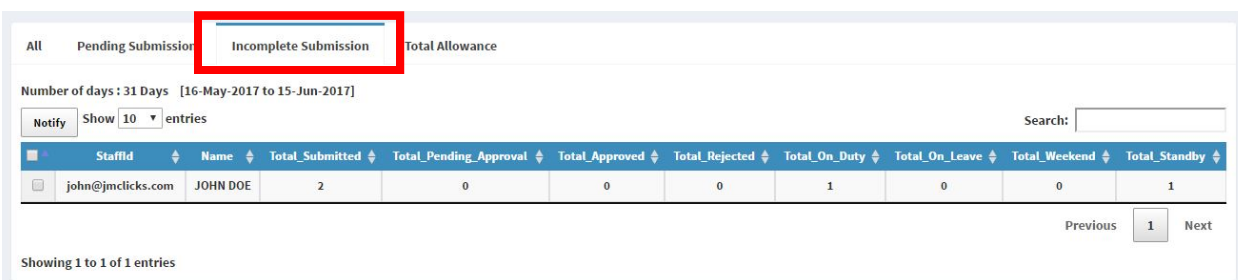
Search:

	StaffId	Name	Total_Submitted	Total_Pending_Approval	Total_Approved	Total_Rejected	Total_On_Duty	Total_On_Leave	Total_Weekend	Total_Standby
	david.lim@	DAVID LIM	0	0	0	0	0	0	0	0
	sakinah@ja	SAKINAH BINTI ABDUL RAHIM	0	0	0	0	0	0	0	0
	shhau@soft	TEST CONTRACTOR	0	0	0	0	0	0	0	0

Previous 1 Next

Showing 1 to 3 of 3 entries

5. **Incomplete Submission** will be showing summary for the count of incomplete summary



All | Pending Submission | Incomplete Submission | Total Allowance

Number of days : 31 Days [16-May-2017 to 15-Jun-2017]

Notify Show 10 entries

Search:

	StaffId	Name	Total_Submitted	Total_Pending_Approval	Total_Approved	Total_Rejected	Total_On_Duty	Total_On_Leave	Total_Weekend	Total_Standby
	john@jmclicks.com	JOHN DOE	2	0	0	0	1	0	0	1

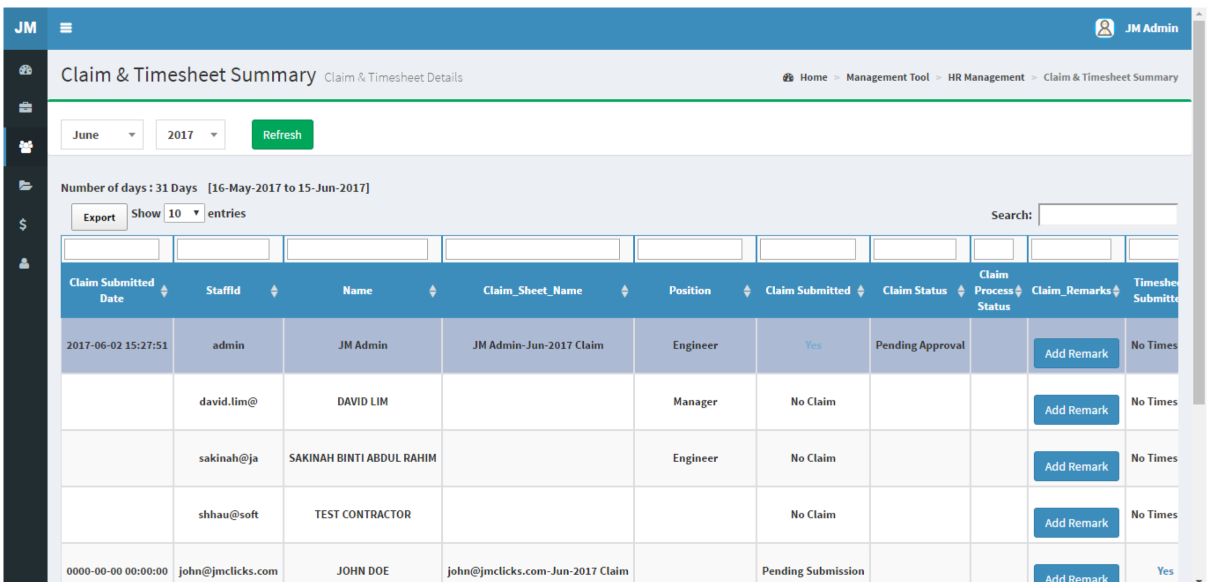
Previous 1 Next

Showing 1 to 1 of 1 entries

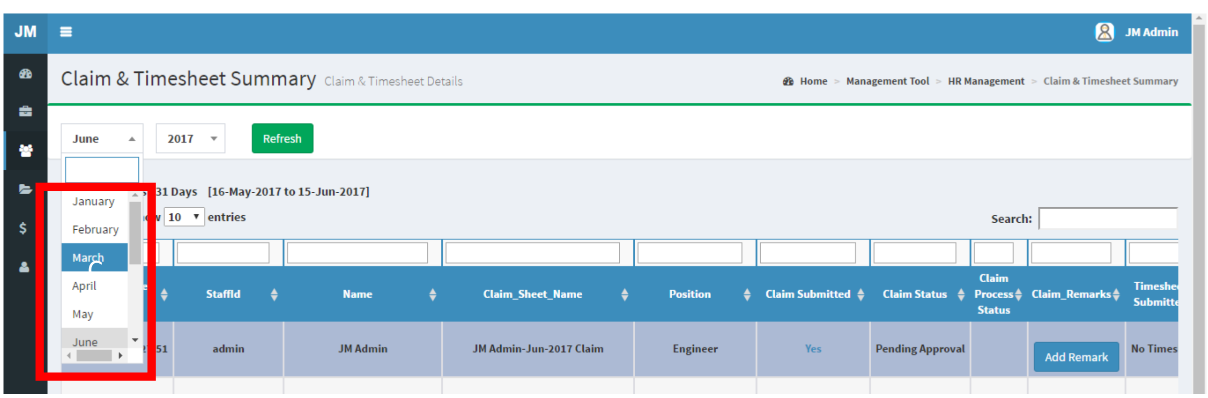
6. **Total allowance** will be showing for summary of the total allowance

➢ CLAIM & TIMESHEET SUMMARY

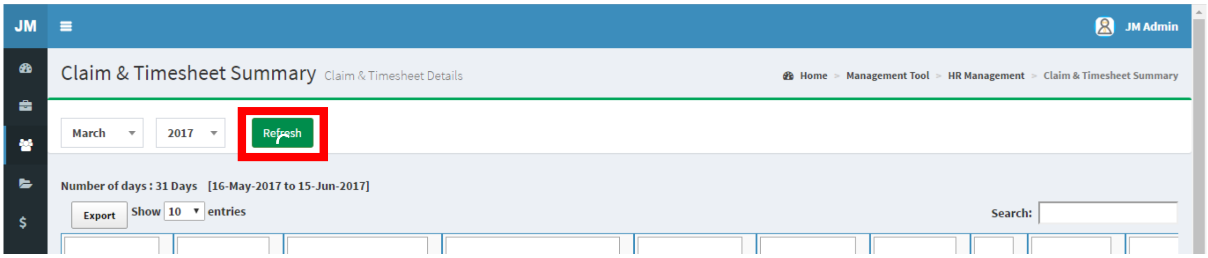
1. Click **Resource Management** > **Claim & Timesheet Summary**



2. **Change Month** to see summary from different month

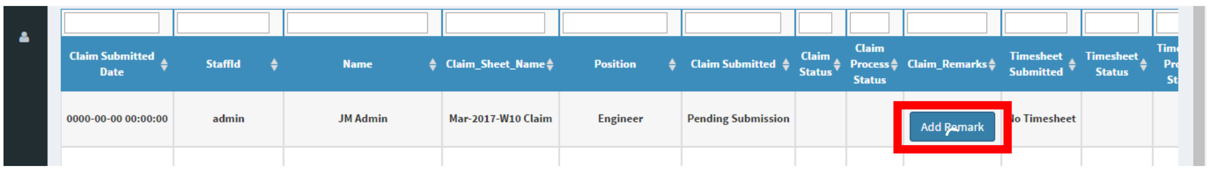


3. Click **Refresh**

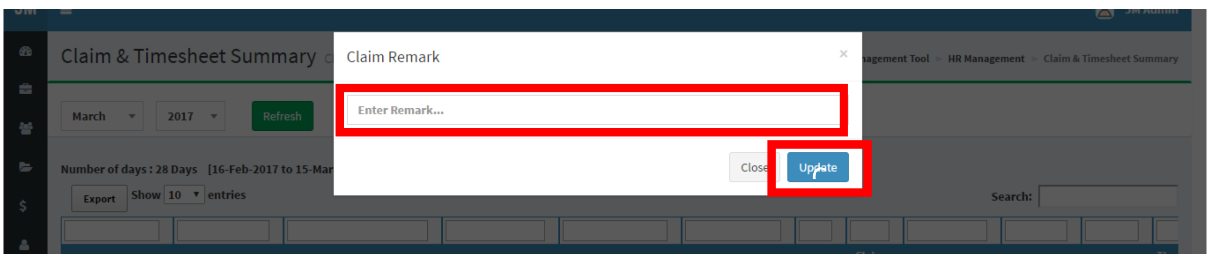


- **How to add Remark**

1. Click on Add Remark button of any column you desired

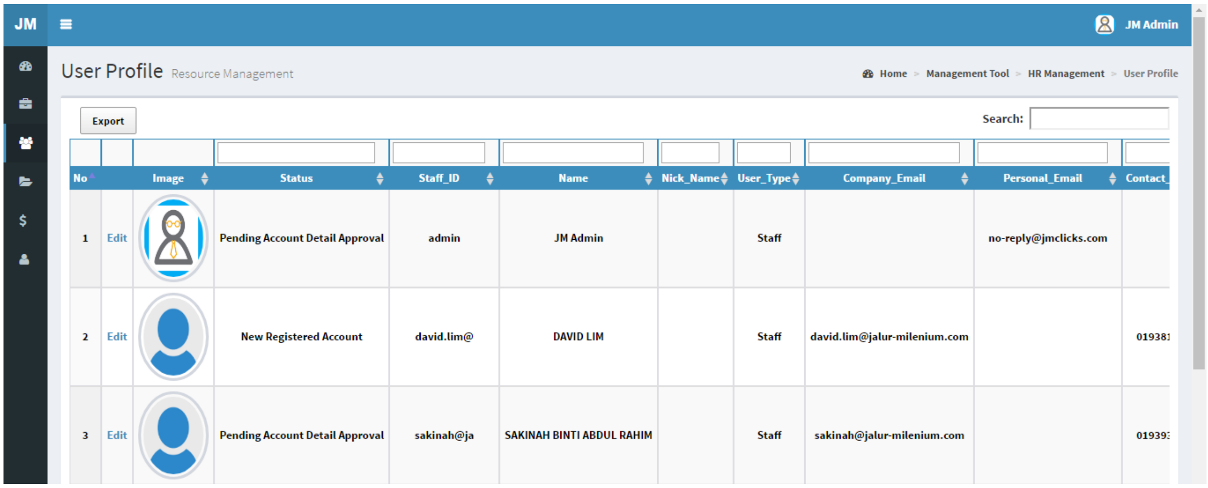


2. Enter you remark and click Update



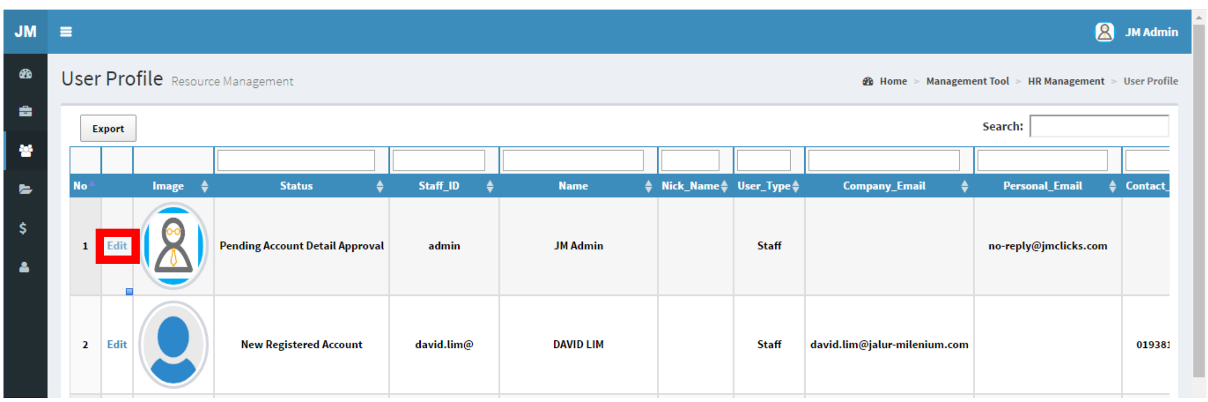
➢ USER PROFILE

1. Click **Resource Management** > **User Profile**

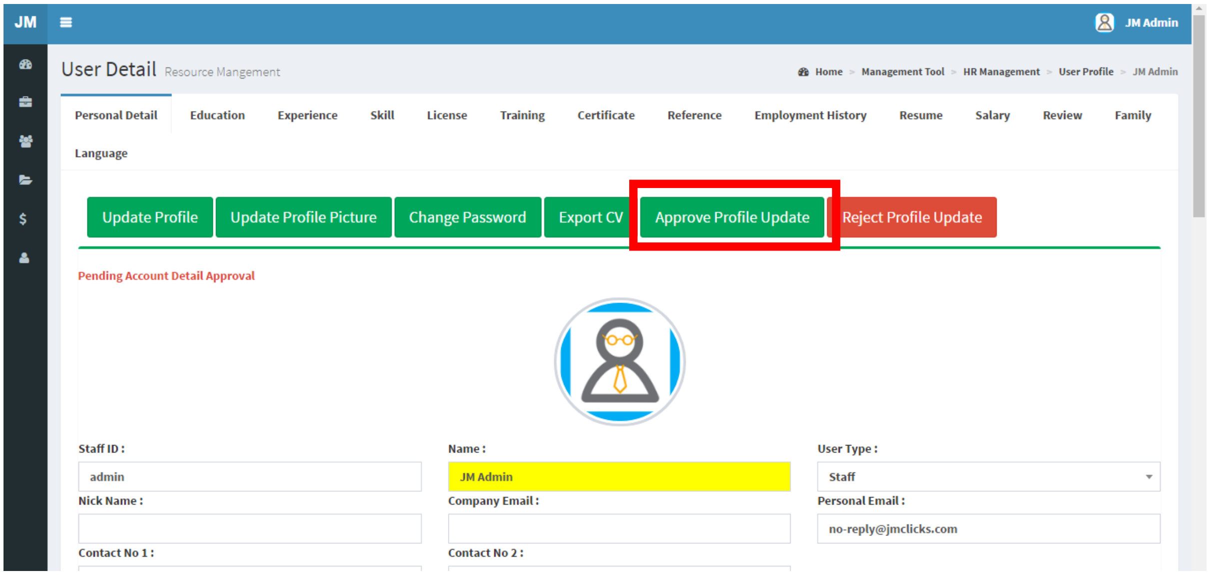


<u>- How Approve Profile Update, Reject Profile Update or edit user account detail</u>

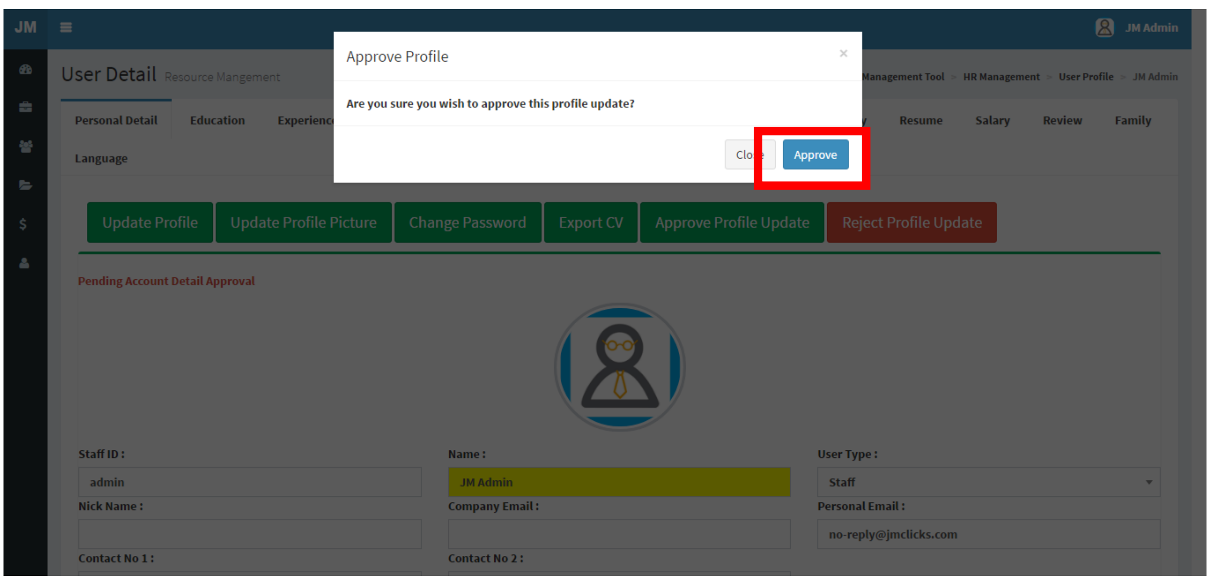
1. Click **Edit** on profile that you want to approve or edit



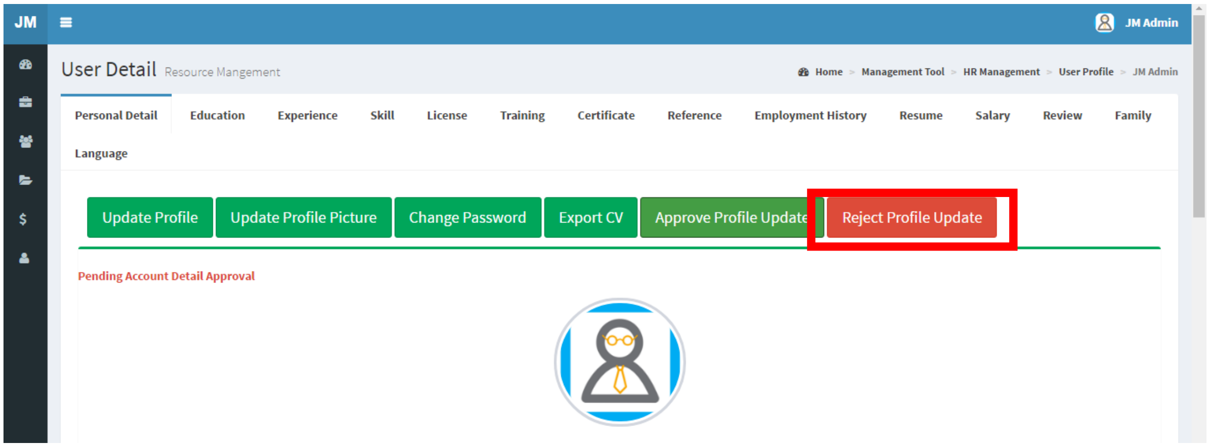
2. Click **Approve Profile Update**



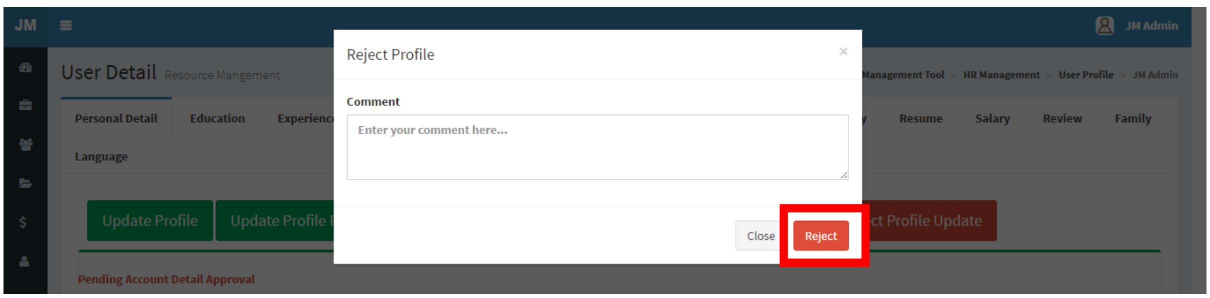
3. Click **Approve**



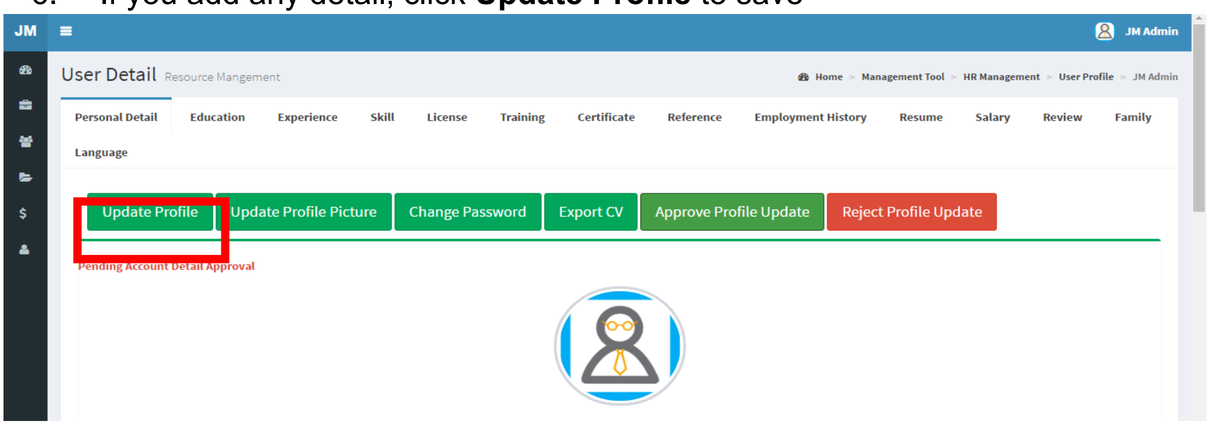
4. To Reject Profile Update, click **Reject Profile Update**



5. Write your **comment** and click **Reject** button



6. If you add any detail, click **Update Profile** to save



7. Click **Update**