

Enterprise - Proofing Time Entry Sessions

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What is Proofing?

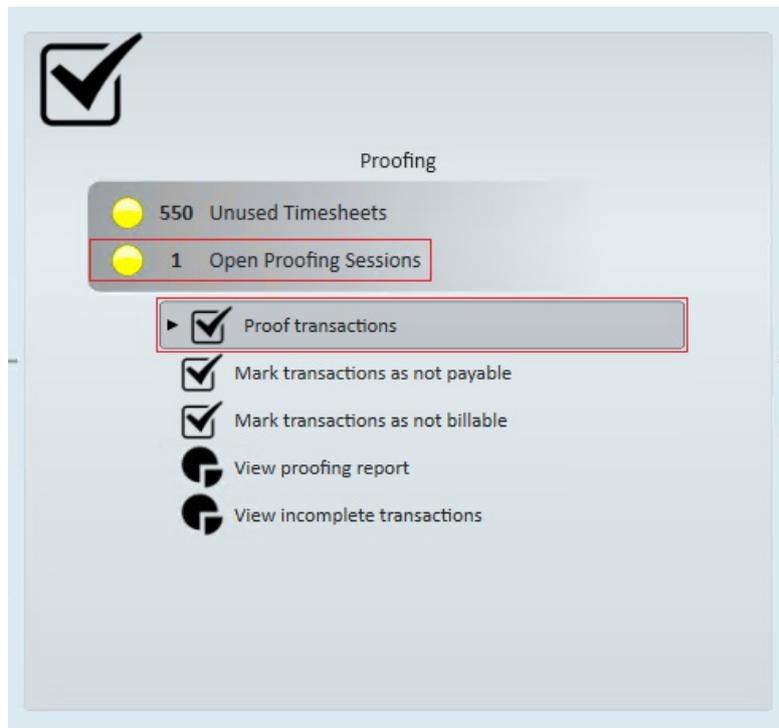
After a user has entered time into time entry in TempWorks Enterprise, the next step is to proof the timecards. This allows both the user and the system to double check that everything is ready to be paid and billed. This document is designed to walk you through the proofing process.

The screenshot displays the 'Payroll / Invoicing' section of the TempWorks Enterprise software. The top navigation bar includes a stack of coins icon, the text 'Payroll / Invoicing', and status indicators: 'Current Weekend Bill 9/20/2015', '557 Unused Timesheets', and '0 Timesheets Not Paid'. A calendar icon shows the date '09/21/2015'. Below the navigation bar is a sidebar with menu items: 'payroll and invoicing', 'time entry', 'check register', 'incomplete transactions', 'invoice register', 'other', 'employee', 'customer', 'order', 'assignment', 'contact', and 'pay / bill'. The main content area features an 'information' icon and a message: 'Your hierarchy does not allow you to close week. Please change your hierarchy if you need this feature.' A flow diagram shows 'Timecards' leading to 'Proofing' (highlighted with a red border), which then branches into 'Payroll' and 'Invoicing'.

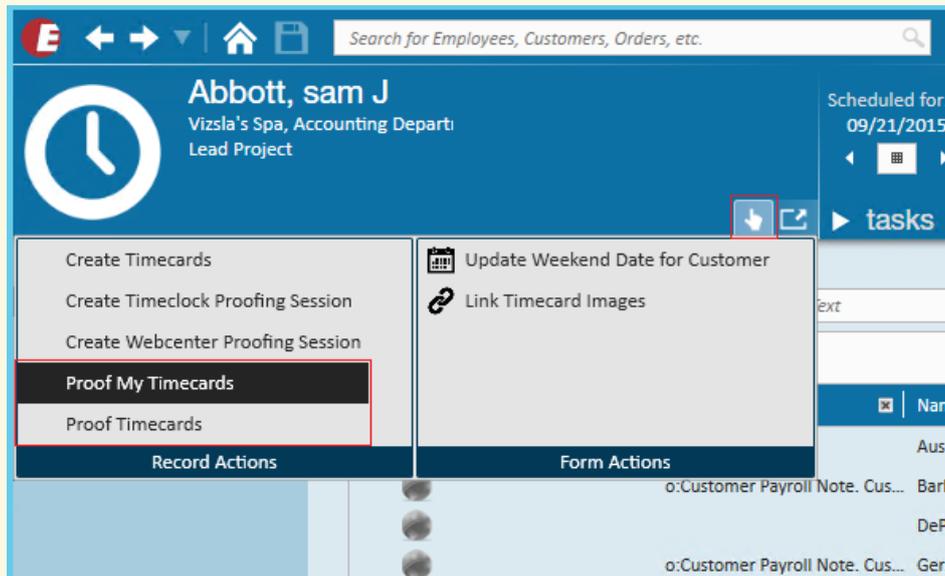
Once you have keyed in hours/units/salary on one+ timecard, you will be required to bring those transactions through a proofing session before a check or invoice can be made. The purpose of the proofing step is to catch and flag any errors, such as the employee missing an SSN or an outlandish amount of hours entered in (for example, let's say someone keyed in 400 instead of 40 -- this would be caught in the proofing step).

An Introduction to Proofing

Highlight and select the proofing box found under pay/bill. Think of the number of open proofing sessions as the number of service reps keying in time. Each user who keys in time will have a proofing session tied to their name. To begin, select to proof transactions.



Note Want to save a few clicks? In the time entry dashboard simply expand the actions menu and then select proof my timecards or proof timecards to be brought directly into the proofing step.



When you open the proofing wizard you will be brought through the 4 step process:

1. [Select the Session](#)
2. [Review the Transactions](#)
3. [Review/Correct Errors](#)
4. [Close the Session](#)
5. [View the Proofing Report](#)

Step 1: Select the Session

Once you have selected to begin a proofing session, the transaction proofing window will populate and the first step is to select the session you would like to proof. Typically, a service rep will select their own session but if someone gets sick, leaves early, or wants help you can choose to proof another service rep's proofing session.

1. Select the name of the session you want to proof
2. Select Next

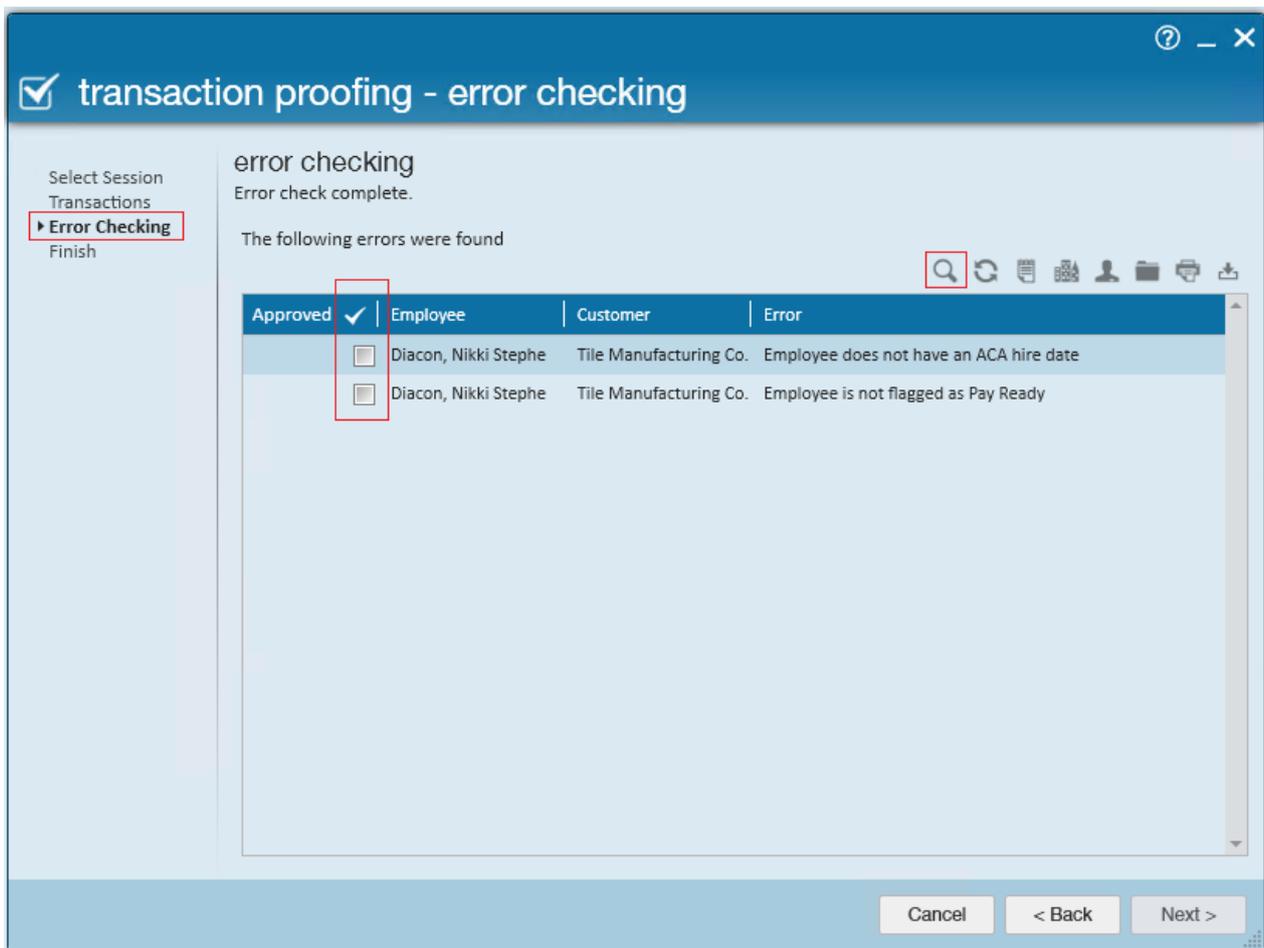
Session ID	Service Rep	CTXNS Records	IsCurrentlySelected	Srident
17997	Amelia Stout	3	<input checked="" type="checkbox"/>	24261
17994	Derek Palm	1	<input checked="" type="checkbox"/>	24427
17979	Katie Mcdonald	0	<input type="checkbox"/>	24407
17982	Katie Mcdonald	0	<input type="checkbox"/>	24407

You can only proof one session at a time.

Step 2: Review Transactions

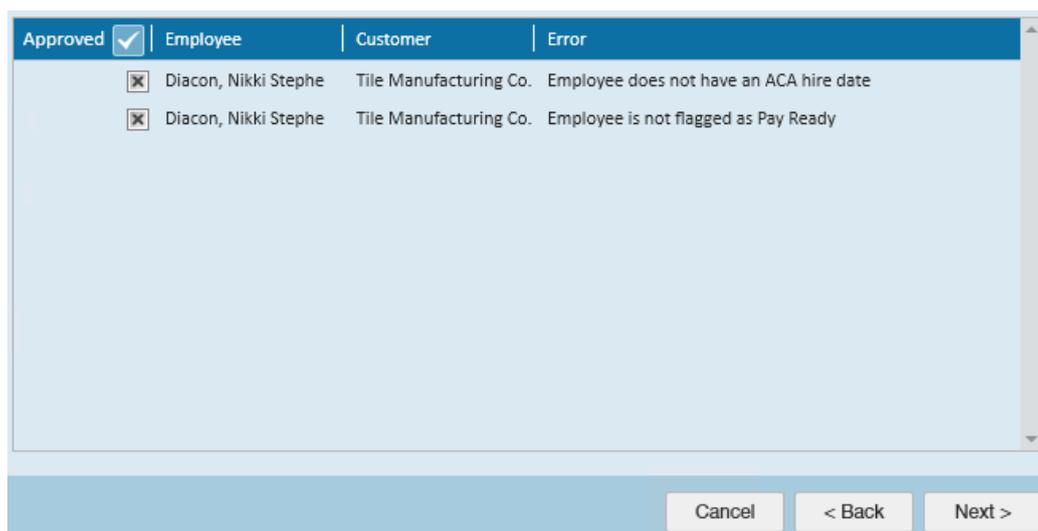
After selecting next, the second step is to review the list of transactions that will be proofed. The purpose of this step is to allow for a visual check -- scan the pay rates, hours, etc. and see if any red flags present themselves.

From this page, service reps can also navigate directly to related employee, customer, and assignment records via the icons in the upper right to investigate or make necessary corrections.



If you have an error message that your manager has given you the green light to override, you can check the box next to the error to approve it. Keep in mind there are logs to determine who approved errors and some of these proofing errors may come back during a payroll or invoice run.

In order to continue, all errors need to be resolved or approved. Hit Next



Note From this screen the user can also navigate to the transaction, refresh transactions, view assignments, view customers, view employees, view orders, print results, or export results that are tied to the transactions in

the proofing run that was selected. This is done by highlighting a line item and selecting the icon tied to the action in the upper right-hand corner.

Step 4: Close the Session

This will bring the user to the last screen of proofing a payroll run. Once this screen appears the user will know that the transaction session has been proofed. From here they have the option to select "Yes, close the session." which will allow these transactions to be pulled into payroll and invoice runs. To close the proofing session, simply click finish.

Selecting "No, leave the session open." allows the user to continue to add transactions in time entry to the open proofing session.

Note The user will need to eventually select "Yes, close this session." in order to close the proofing transactions session and allow the transactions to be pulled into the payroll and invoice run.

Also located on our final screen is direct access to the "transaction summary report."

transaction proofing - finish

Select Session
Transactions
Error Checking
▶ **Finish**

finished
This transaction session has been proofed.

Do you wish to close this session? Closing the transaction session will allow these transactions to be pulled into payroll and invoice runs.

Yes, close the session.
 No, leave the session open.

 **View transaction summary report**

Cancel < Back Finish

The transaction summary report displays all employee, customer, quantity (hours and units), pay, and bill data for timecards proofed in that open session along with a report total on the last page:

Report Viewer

Sort By: Employee

View Report

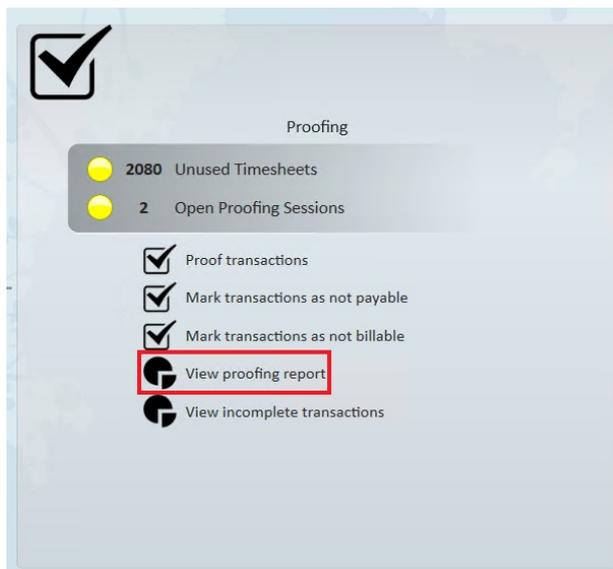
Timecard Session Review
High Tech Staffing
Activity for session 9639

Entity Level (Hierid 2)

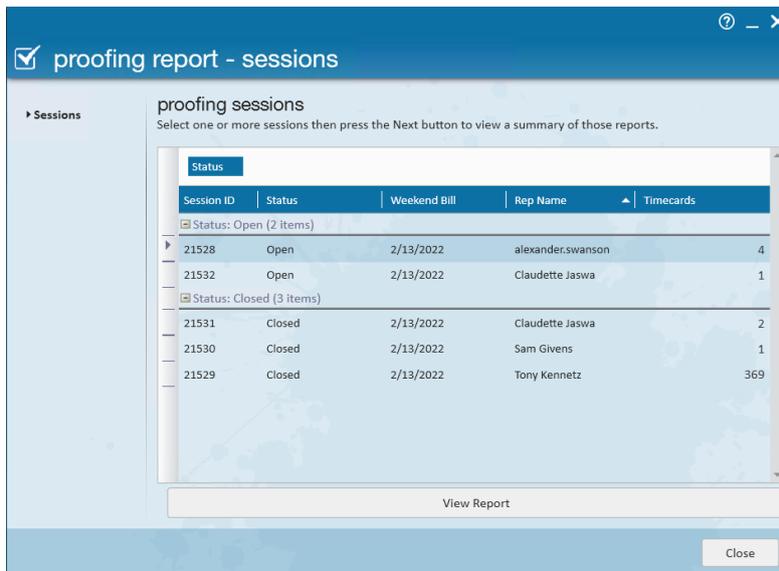
Employee		Customer		Quantity		Pay			Bill				
Session 9639 (shawna.bradt)												7 timecards	
Name	Berston, Nora	Name	Tile Manufacturing Co.	Reg Hours	38.00	Reg Rate	\$14.50	Reg Pay	\$551.00	Reg Rate	\$22.04	Reg Bill	\$837.52
ID	4295004010	Dept	Primary	Ovr Hours	0.00	Ovr Rate	\$21.75	Ovr Pay	\$0.00	Ovr Rate	\$33.06	Ovr Bill	\$0.00
Week	9/20/2015	ID	4295010384	Dbl Hours	0.00	Dbl Rate	\$29.00	Dbl Pay	\$0.00	Dbl Rate	\$44.08	Dbl Bill	\$0.00
Branch	Memphis SE	Super		Units	0.00	Unit Rate	\$0.00	Unit Pay	\$0.00	Unit Rate	\$0.00	Unit Bill	\$0.00
Skill Code	Forklift	PO #		Pay Code	Reg			Salary	\$0.00			Salary Bill	\$0.00
WC Code	3126 TX	Order ID	4295033882			Adjustments		Adj Pay	\$0.00	Adjustments		Adj Bill	\$0.00
# TC Img	0	Entity/CC						Total Pay	\$551.00			Total Bill	\$837.52
Name	Diacon, Nikki	Name	Tile Manufacturing Co.	Reg Hours	39.00	Reg Rate	\$25.00	Reg Pay	\$975.00	Reg Rate	\$42.50	Reg Bill	\$1,657.50
ID	12685	Dept	Primary	Ovr Hours	0.00	Ovr Rate	\$37.50	Ovr Pay	\$0.00	Ovr Rate	\$56.25	Ovr Bill	\$0.00
Week	9/20/2015	ID	4295010384	Dbl Hours	0.00	Dbl Rate	\$50.00	Dbl Pay	\$0.00	Dbl Rate	\$100.00	Dbl Bill	\$0.00
Branch	Memphis SE	Super		Units	0.00	Unit Rate	\$0.00	Unit Pay	\$0.00	Unit Rate	\$0.00	Unit Bill	\$0.00
Skill Code	Paralegal	PO #		Pay Code	Reg			Salary	\$0.00			Salary Bill	\$0.00
WC Code	3126 TX	Order ID	4295044356			Adjustments		Adj Pay	\$0.00	Adjustments		Adj Bill	\$0.00
# TC Img	0	Entity/CC						Total Pay	\$975.00			Total Bill	\$1,657.50
Name	Fuller, Sandra	Name	Tile Manufacturing Co.	Reg Hours	40.00	Reg Rate	\$27.00	Reg Pay	\$1,080.00	Reg Rate	\$45.90	Reg Bill	\$1,836.00

Step 5: View the Proofing Report

The Proofing report can be run from Enterprise > Pay/Bill > Proofing > View proofing report:



After selecting "View proofing report", a window of all the "Open" and "Closed" Proofing sessions will be displayed from the current open week:



After selecting one or more Proofing sessions from the list, select "View Report". A new window will open with the Timecard Session Review report, displaying all of the timecard information from the selected Proofing sessions:

Employee	Customer	Quantity	Pay	Bill
Session 21531 (claudette)				
Name: Becket, Sam	Name: Catawba Strong Steel	Reg Hours: 34.00	Reg Rate: \$20.00	Reg Pay: \$680.00
ID: 5522	Dept: Primary	Ovr Hours: 0.00	Ovr Rate: \$30.00	Ovr Pay: \$0.00
Week: 2/13/2022	ID: 4295025416	Dbl Hours: 0.00	Dbl Rate: \$40.00	Dbl Pay: \$0.00
Branch: Minneapolis	Super: Robin, Julie	Units: 0.00	Unit Rate: \$0.00	Unit Pay: \$0.00
Skill Code: Forklift	PO #: ABCD	Pay Code: Reg	Salary: \$0.00	Salary Bill: \$0.00
WC Code: MN 2303	Order ID: 4295112985	Adjustments	Adj Pay: \$0.00	Adj Bill: \$0.00
# TC Img: 0	Entity/CC	Total Pay: \$680.00	Adjustments	Total Bill: \$1,298.80
Session 21531 Totals:				
claudette		Reg Hrs: 58.00	Reg Pay: \$1,160.00	Reg Bill: \$2,215.60
2 timecards		Ovr Hrs: 0.00	Ovr Pay: \$0.00	Ovr Bill: \$0.00
		Dbl Hrs: 0.00	Dbl Pay: \$0.00	Dbl Bill: \$0.00
		Units: 0.00	Unit Pay: \$0.00	Unit Bill: \$0.00
		Adjustments	Salary: \$0.00	Salary Bill: \$0.00
		Adjustments	Adj Pay: \$0.00	Adj Bill: \$0.00
		Total Pay: \$1,160.00	Adjustments	Total Bill: \$2,215.80
Session 21528 (alexander.swanson)				
Name: Gregorius, Ronda	Name: Galls Weatherballoons	Reg Hours: 40.00	Reg Rate: \$20.00	Reg Pay: \$800.00
ID: 4295016746	Dept: Primary	Ovr Hours: 0.00	Ovr Rate: \$30.00	Ovr Pay: \$0.00
Week: 2/12/2022	ID: 4295014094	Dbl Hours: 0.00	Dbl Rate: \$40.00	Dbl Pay: \$0.00
Branch: Eagan	Super: Smith, Bryan	Units: 0.00	Unit Rate: \$0.00	Unit Pay: \$0.00
Skill Code: Packaging	PO #: ABCD	Pay Code: Reg	Salary: \$0.00	Salary Bill: \$0.00
WC Code: MN 2233	Order ID: 4295090544	Adjustments	Adj Pay: \$0.00	Adj Bill: \$0.00
# TC Img: 0	Entity/CC	Total Pay: \$800.00	Adjustments	Total Bill: \$1,048.00

The Timecard Session Review report is a great way to verify all timecard information within proofing sessions.

Note Enterprise allows for Custom Proofing Reports to be run when selecting "View proofing report" within the Pay/Bill > Proofing menu.

If you have a Custom Proofing Report that you would like to have added to this functionality, please contact [TempWorks Support](#).

Related Articles