Enterprise - Proofing Time Entry Sessions

Last Modified on 02/24/2022 3:40 pm CST

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 it designed to walk you through the proofing process.



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.

Abbott, sam Vizsla's Spa, Accountin Lead Project	rch for Employees, Customers, Orders, etc.
Create Timecards	Update Weekend Date for Customer
Create Timeclock Proofing Session	Link Timecard Images
Create Webcenter Proofing Session	
Proof My Timecards	
Proof Timecards	
Record Actions	Form Actions A
	o:Customer Payroll Note. Cus B
	D D

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

🗹 transact	ion proofin	g - select ses	sion		
Select Open Week	Select Session	DN a session to proof.			
Error Checking	Session ID	Service Rep 🔺	CTXNS Records	IsCurrentlySelected	Srident
Finish	17997	Amelia Stout	3		24261
	17994	Derek Palm	1		24427
	17979	Katie Mcdonald	0		24407
	17982	Katie Mcdonald	0		24407
					-
				Cancel	Back Next >
				Ganoor	

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.

② _ ×



Step 3: Error Checking

This is the step where Enterprise will double check to make sure the records and transactions are ready to be paid and/or invoiced. This is checking for common issues such as more than 40 regular hours, employee does not have an SSN, etc.

While your system may be set up with custom proofing errors, most common errors are documented in our article: Proofing Errors, Their Meanings, and How To Fix. We recommend saving that page to review when you get an interesting proofing error and are not sure how to proceed.

As you fix an error by navigating to the transaction or related record, you can keep this window open. Click the Refresh icon next the magnifying glass to have the error check run again.

								7	_ ×
🗹 transacti	ion proc	ofin	g - error c	hecking					
Select Session Transactions Ferror Checking	Error check of The followir	ƏC KİI comple	ng ete. ors were found						
Finish		-				C 🗐	B 1	i 🖗	*
	Approved	\checkmark	Employee	Customer	Error				^
			Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee does not	have an ACA hire	date		
			Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee is not flag	gged as Pay Ready	/		
			•						
									-
							-		_
						Cancel	Back	Next	>

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

Approved 🗸	Employee	Customer	Error	^
×	Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee does not have an ACA hire date	
×	Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee is not flagged as Pay Ready	
				4
			Cancel < Back 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."

	@ _ ×
🗹 transact	ion 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. Image: Ves, close the session. Image: No, leave the session open. Image: 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:

G				Re	eport	Viewer								x
Sort By	Employee 🗸												View Rep	port
 4 4 1	of 2 🕨 🄰 🖕	🛛 🚯 🛛	🗎 🔲 🔍 🔍 - 📋 100%	-		Find	Next							
Timeca	ard Session Revi	ew								9				^
High Tech	Staffing						Entit	y Level (Hierk	(2)	o tem	owo	rks		
Activity for	session 9639								ι _L		SOF	TWARE		
	Employee		Customer	Quantity			Pa	ay			i	Bill		
Session 9	639 (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	D	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			Adjustme	nts	Adj Pay	\$0.00	Adjustme	ents	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	D	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			Adjustme	nts	Adj Pay	\$0.00	Adjustme	ents	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:

Sessions	pr Sel	roofing se lect one or mo	SSIONS	ess the Next button to v	iew a summary of those repor	ts.
		Status				
		Session ID	Status	Weekend Bill	Rep Name 🔺 🕇	Fimecards
		Status: Op	en (2 items)			j. s. e
	•	21528	Open	2/13/2022	alexander.swanson	4
		21532	Open osed (3 items)	2/13/2022	Claudette Jaswa	1
		21531	Closed	2/13/2022	Claudette Jaswa	2
		21530	Closed	2/13/2022	Sam Givens	1
		21529	Closed	2/13/2022	Tony Kennetz	369

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:

🧲 Repo	rt Viewer											-	
Sort By	Employee ~												View Repo
					Tanal I Alas								1
Timoor	of 2 P N + W		100%		-ind i ive:	ĸt							
lineCo		W						5 I I.M.F.	and and	2 tom	nwo	rks	
ngn reci	1 Staming						Ent	ity Level (Hie	rid 2)	o ten	IL AND	T W A R E	
ACTIVITY IOLS	essions 21526, 21551												
	Employee		Customer	Quan	tity		P	ay			E	Bill	2.4
Session 21	531 (claudette)	Marrie	Ostanita Otara Otari	Destine	24.00	Due Data	620.00	0	¢000.00	Dee Dete	620.20	00	2 timecards
Name	Decket, Sam	Name	Catawba Strong Steel	Reg Hours	34.00	Reg Rate	\$20.00	Reg Pay	\$000.00	Reg Rate	\$30.20	Reg Dill	\$1,290.00
	3052	Debr	4005005445	DELLIS	0.00	Did Date	\$30.00	DH Day	\$0.00	DH Data	\$37.30	DM DIII	\$0.00
Prench	Z/15/ZUZZ Minneenelie	ID Sugar	4295025416 Debin Julia	Unite	0.00	Unit Date	\$40.00	Ubit Day	\$0.00	Upit Data	\$70.40	Linit Bill	\$0.00
Dianch Skill Cada	Fordelia	DO #	ABCD	Day Cada	0.00 Dec	Unit Rate	30.00	Calan:	\$0.00	Unit Rate	30.00	Calaas Rill	\$0.00
MC Code	MNI 2202	Order ID	ADCD 4296112986	Fay Code	Reg	Adius	imonto	Adi Dav	\$0.00	Adjust	monto	Adi Bill	\$0.00
# TC Ima	NIN 2303	EntitulCC	4295112905			Adjus	aments	Auj Pay	\$0.00	Adjust	ments	Auj Dill Total Bill	\$0.00
# ro my	0	Linuty/CC						iotai Pay	\$000.00			Total Dill	31,250.00
Name	Berry, Tyler	Name	Catawba Strong Steel	Reg Hours	24.00	Reg Rate	\$20.00	Reg Pay	\$480.00	Reg Rate	\$38.20	Reg Bill	\$916.80
D	4295014625	Dept	Primary	Ovr Hours	0.00	Ovr Rate	\$30.00	Ovr Pay	\$0.00	Ovr Rate	\$57.30	Ovr Bill	\$0.00
Week	2/13/2022	ID	4295025416	Dbl Hours	0.00	Dbl Rate	\$40.00	Dbl Pay	\$0.00	Dbl Rate	\$76.40	Dbl Bill	\$0.00
Branch	Minneapolis	Super	Robin, Julie	Units	0.00	Unit Rate	\$0.00	Unit Pay	\$0.00	Unit Rate	\$0.00	Unit Bill	\$0.00
Skill Code	Forklift	PO #	ABCD	Pay Code	Reg			Salary	\$0.00			Salary Bill	\$0.00
WC Code	MN 2303	Order ID	4295112986			Adjus	tments	Adj Pay	\$0.00	Adjust	ments	Adj Bill	\$0.00
# TC Img	0	Entity/CC						Total Pay	\$480.00			Total Bill	\$916.80
Session 21	531 Totals:			Reg Hrs	58.00			Reg Pay	\$1,160.00			Reg Bill	\$2,215.60
claudette				Ovr Hrs	0.00			Ovr Pay	\$0.00			Ovr Bill	\$0.00
2 timecar	ds			Dbl Hrs	0.00			Dbl Pay	\$0.00			Dbl Bill	\$0.00
				Units	0.00			Unit Pay	\$0.00			Unit Bill	\$0.00
								Salary	\$0.00			Salary Bill	\$0.00
						Adjus	stments	Adj Pay	\$0.00	Adjust	ments	Adj Bill	\$0.00
								Total Pay	\$1,160.00			Total Bill	\$2,215.60
Session 21	528 (alexander.swanson)												4 timecards
Name	Gregorius, Ronda	Name	Gails Weatherballoons	Reg Hours	40.00	Reg Rate	\$20.00	Reg Pay	\$800.00	Reg Rate	\$26.20	Reg Bill	\$1,048.00
ID	4295016746	Dept	Primary	Ovr Hours	0.00	Ovr Rate	\$30.00	Ovr Pay	\$0.00	Ovr Rate	\$39.30	Ovr Bill	\$0.00
Week	2/12/2022	ID	4295014094	Dbl Hours	0.00	Dbl Rate	\$40.00	Dbl Pay	\$0.00	Dbl Rate	\$52.40	Dbl Bill	\$0.00
Branch	Eagan	Super	Smith, Bryan	Units	0.00	Unit Rate	\$0.00	Unit Pay	\$0.00	Unit Rate	\$0.00	Unit Bill	\$0.00
Skill Code	Packaging	PO #		Pay Code	Reg			Salary	\$0.00			Salary Bill	\$0.00
WC Code	MN 2233	Order ID	4295090544			Adjus	tments	Adj Pay	\$0.00	Adjust	ments	Adj Bill	\$0.00
# TC Img	0	Entity/CC						Total Pay	\$800.00			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