

# Enterprise - Proofing Time Entry Sessions

Last Modified on 12/31/2019 4:14 pm CST

## What is Proofing?

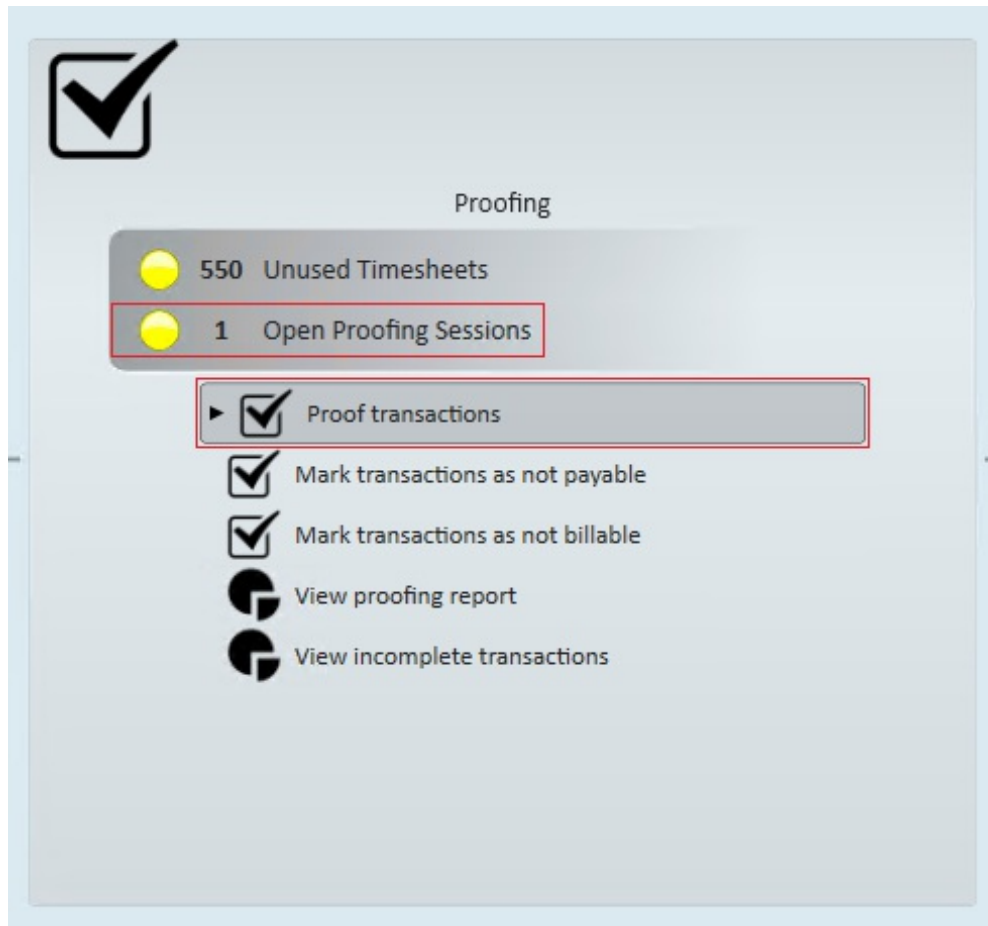
After a user has entered time into time entry in TempWorks Enterprise, the next step is to proof the timecards. This allows both the user and the system to double check that everything is ready to be paid and billed. This document is designed to walk you through the proofing process.

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 'Scheduled for: 09/21/2015' date selector is also visible. The left sidebar lists navigation options: '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' message: 'Your hierarchy does not allow you to close week. Please change your hierarchy if you need this feature.' Below this is a flowchart showing the process: 'Timecards' leads to 'Proofing' (highlighted with a red border), which then branches into 'Payroll' and 'Invoicing'.

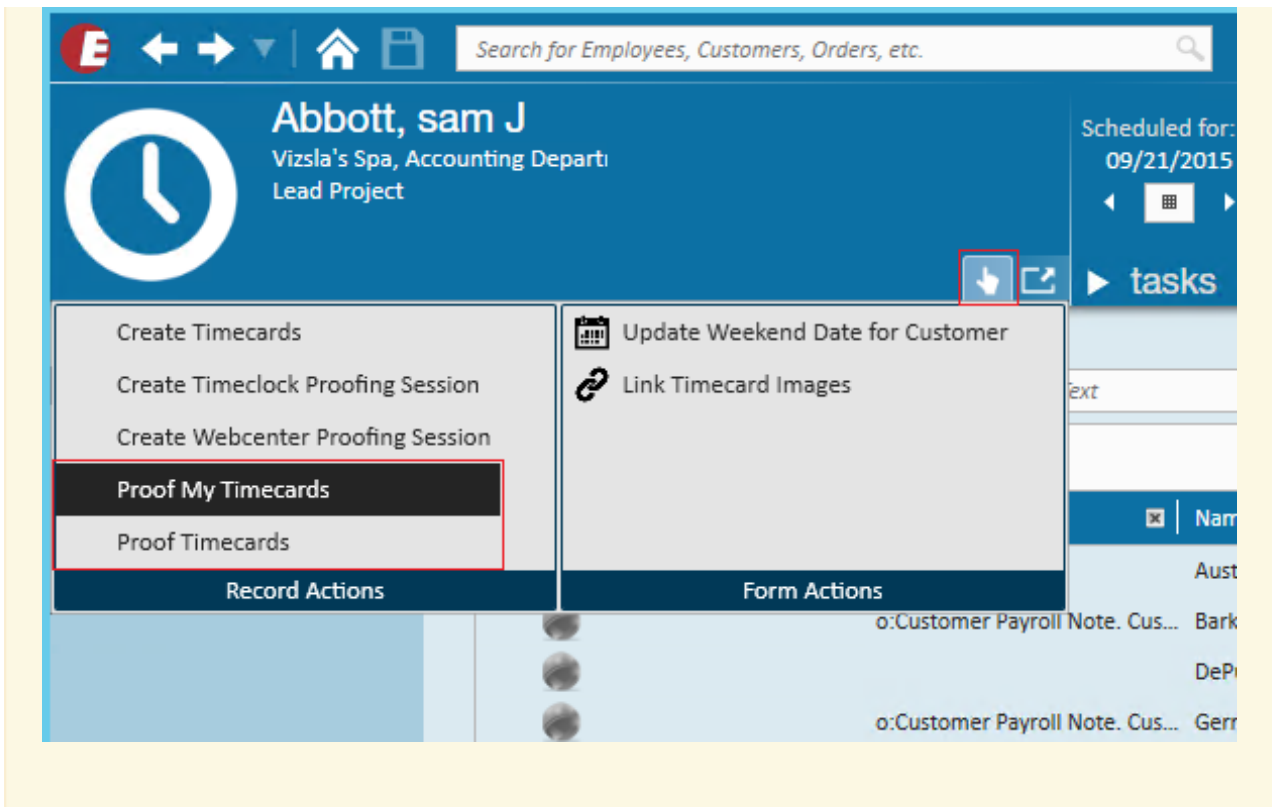
Once you have keyed in hours/units/salary on one+ timecard, you will be required to bring those transactions through a proofing session before a check or invoice can be made. The purpose of the proofing step is to catch and flag any errors, such as the employee missing an SSN or an outlandish amount 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:

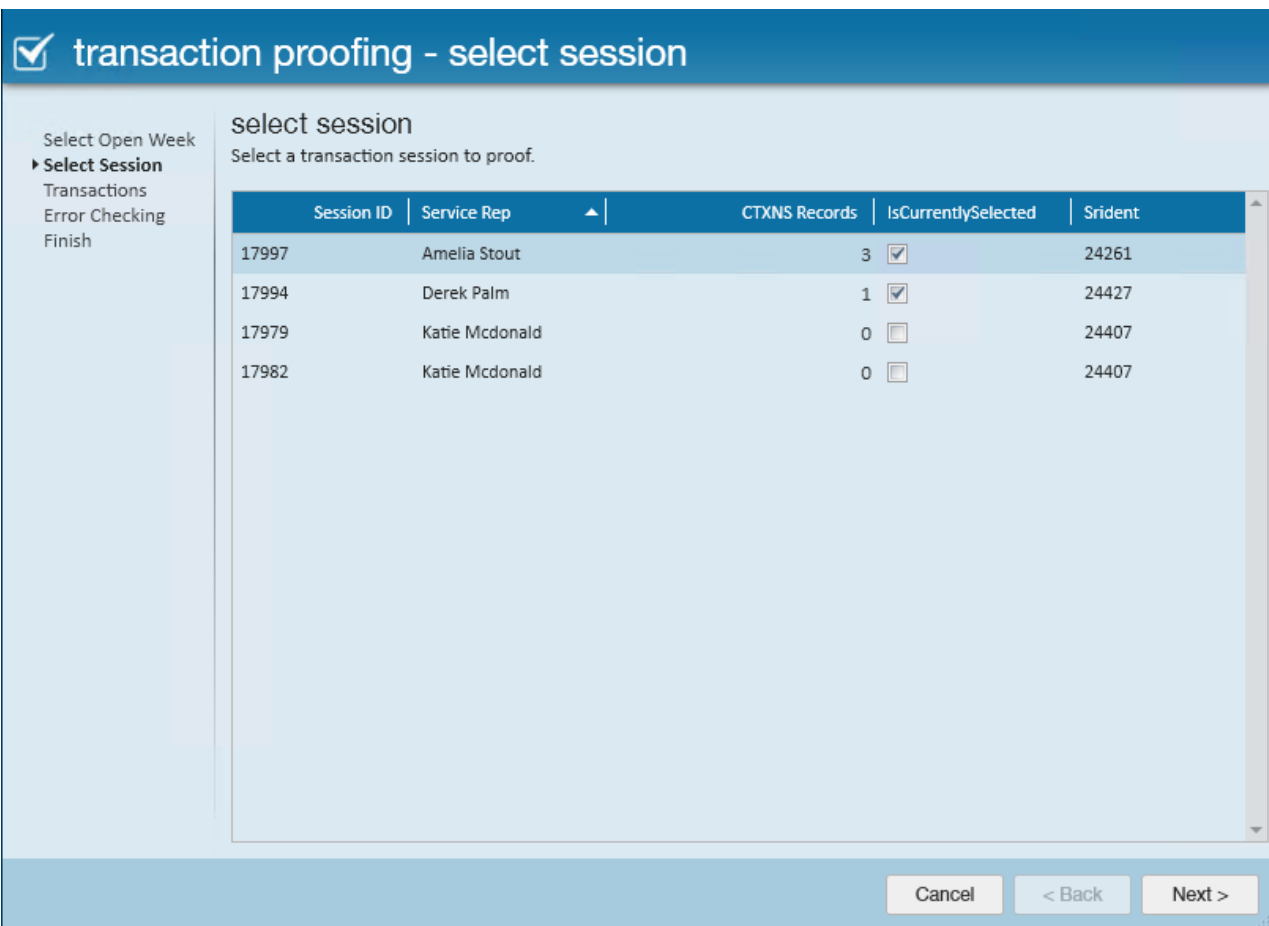
1. [Select the Session](#)
2. [Review the Transactions](#)
3. [Review/Correct Errors](#)
4. [Close the Session](#)

---

## 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



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.

transaction proofing - transactions

Select Session

- **Transactions**
- Error Checking
- Finish

transactions

Please review the list of transactions that will be proofed. Clicking Next will begin the proofing process.

Employee	Customer	Pay Code	Reg Hrs	OT Hrs	Reg Pay
Berston, Nora	Tile Manufacturing Co. (Primary)	Reg	38	0	\$14.50
Hansoen, Jennifer	Tile Manufacturing Co. (Primary)	Reg	39	0	\$14.00
Gimpson, Patrick	Tile Manufacturing Co. (Primary)	Reg	38	0	\$14.00
Guzman, Jenny	Tile Manufacturing Co. (Primary)	Reg	40	0	\$9.25
Fuller, Sandra Lee	Tile Manufacturing Co. (Primary)	Reg	40	0	\$27.00
Diacon, Nikki Stephe	Tile Manufacturing Co. (Primary)	Reg	39	0	\$25.00
Grichum, Anna	Tile Manufacturing Co. (Primary)	Reg	37	0	\$10.25
Total: 7			271.00	0.00	

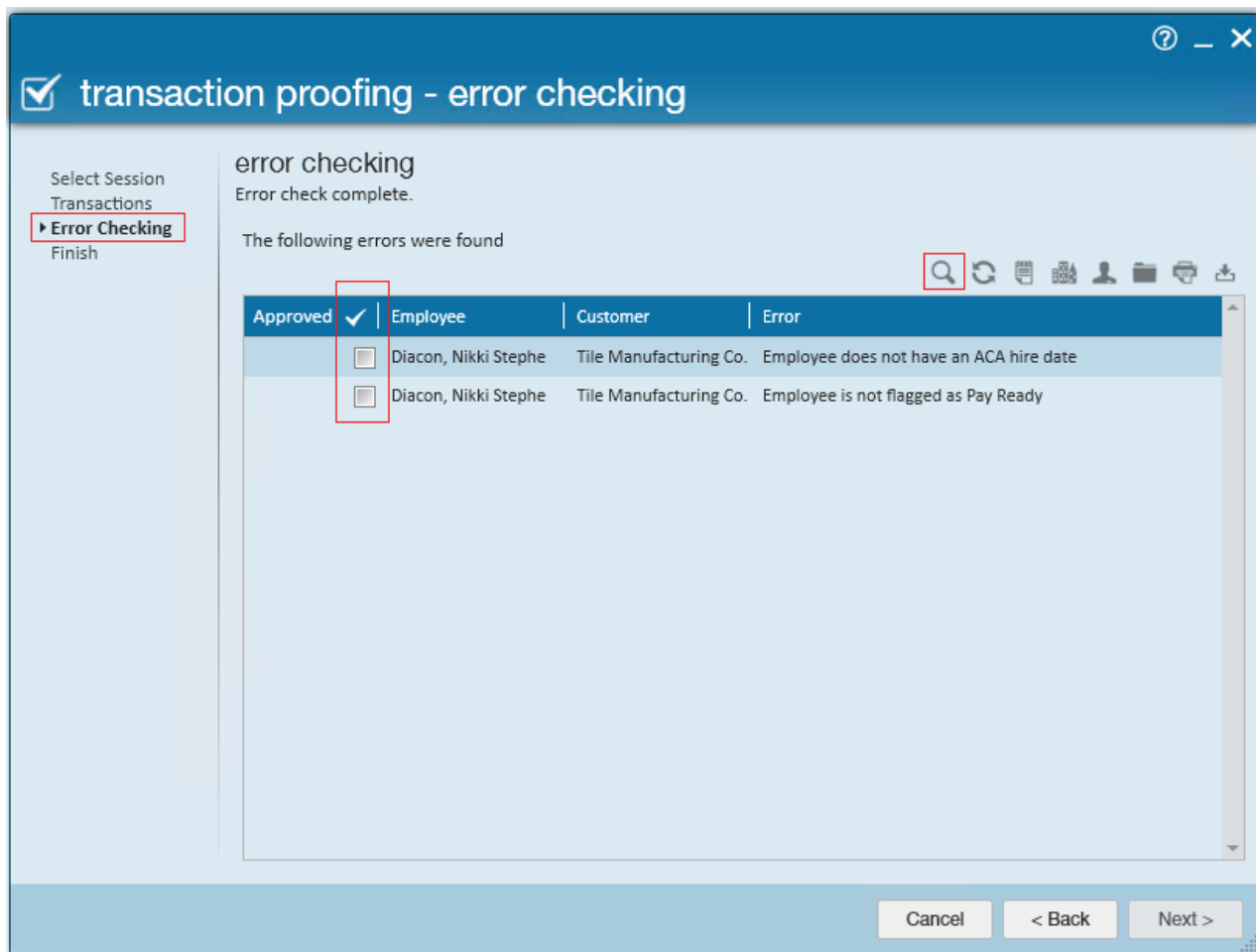
Cancel   < Back   Next >

## 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.



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 <input checked="" type="checkbox"/>	Employee	Customer	Error
<input checked="" type="checkbox"/>	Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee does not have an ACA hire date
<input checked="" type="checkbox"/>	Diacon, Nikki Stephe	Tile Manufacturing Co.	Employee is not flagged as Pay Ready

**\*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

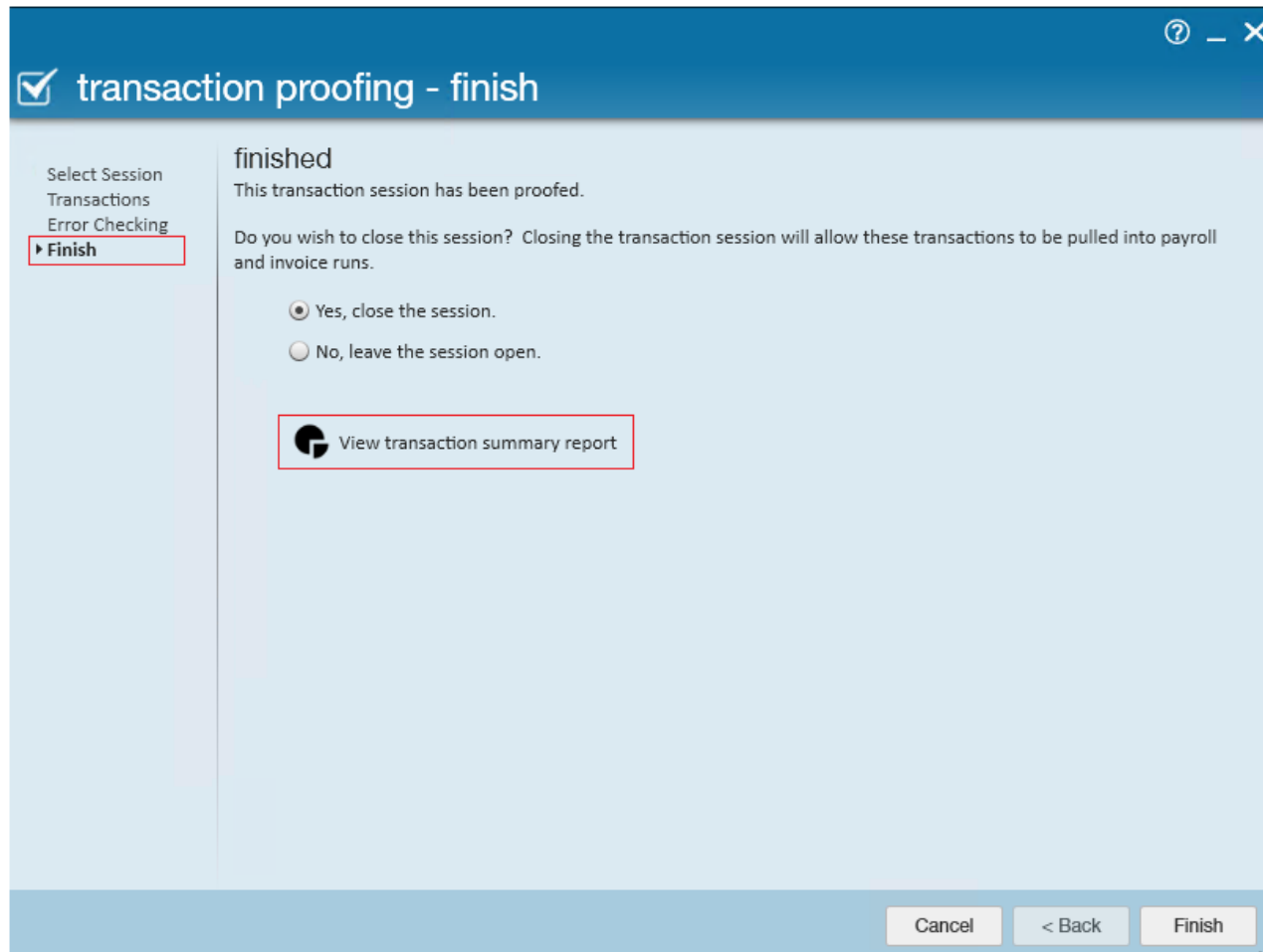
This will bring the user to the last screen of proofing a payroll run. Once this screen appears the user will know that the transaction session has been proofed. From here they have the option to select "Yes, close the session." which will allow these transactions to be pulled into payroll and invoice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



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

1 of 2


100%

Find | Next

### Timecard Session Review

High Tech Staffing

Entity Level (Hierid 2)



Activity for session 9639

Employee		Customer	Quantity		Pay			Bill					
<b>Session 9639 (shawna.bradt)</b>										<b>7 timecards</b>			
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

# Related Articles