

PROCAS Time User Instructions

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Establishing a Password

NOTE: The “I Forgot My Password” button on the log in screen can be used to establish a password if the password is not known or has been forgotten. This section can be skipped if the password is known.

- Use a web browser to go to the following web address:
http://www.procastime.com/**sample** (where “sample” is the company name or an abbreviation for the name)
 - The “Welcome to PROCAS Time and Expense” screen will be displayed.
- Click the “I Forgot My Password” button.
 - The “Forgot Your Password” screen will be displayed.
 - “Enter Your E-Mail” – Enter the e-mail address that has been setup for you by a time and expense administrator.
- Click the “Send My Password” button.
 - The “Your Request Has Been Processed. Please Check Your E-Mail” message will be displayed.

NOTE: An e-mail message will be sent to the e-mail address that was entered in the “I Forgot My Password” screen if the password has been setup for the time and expense system by an administrator. If an e-mail message is not received, first check Junk E-Mail folders, and then verify that the administrator has setup a valid e-mail address.

- Open the e-mail message.
- Click the link provided in the e-mail message, or copy and paste the link into a web browser address bar.
 - The “Password Reset” screen will be displayed.
 - “New Password” – Enter the new password.
 - “Confirm Password” – Enter the new password again to confirm.
- Click the “Save” button.
 - The “Password Was Successfully Changed” message will be displayed.

NOTE: The link to the “Password Reset” screen contained in the e-mail message can be used only one time. If it is necessary to repeat this process, restart by clicking the “I Forgot My Password” button on the log in screen again to generate a new link to the “Password Reset” screen.

Logging on to the Web-Enabled Timekeeping System

- Use a web browser to go to the following web address:
http://www.procastime.com/**sample** (where “sample” is the company name or an abbreviation for the name)
 - The “Welcome to PROCAS Time and Expense” screen will be displayed.
 - “User Name” – Enter the user name.
 - “Password” – Enter the password.
- Click the “Log In” button.
 - The current period timesheet will be displayed.

NOTE: Charge codes will not be displayed on the timesheet the first time the system is used. To add charge codes to the timesheet, follow the [“Establishing Default Charge Codes”](#) or [“Adding a New Charge Code to a Timesheet”](#) directions.

Changing a Password

NOTE: The password should be changed during the first login if a default password was provided.

- Click the “Change My Password” link in the upper right hand corner of the screen.
 - The “Change Password” screen will be displayed.
 - “Current Password” – Enter the current password.
 - “New Password” – Enter the new password.
 - “Confirm Password” – Enter the new password again to confirm.
- Click the “Save” button.
 - The “Password Was Successfully Changed” message will be displayed.

Establishing Default Charge Codes

NOTE: Charge codes can be selected from a list of authorized charge codes to be displayed on timesheets by default. The default charge codes will be displayed on timesheets each period until the charge code is no longer authorized by the administrator or until the charge code is removed from the default charge code list by the user.

- Click the "Timesheets" menu.
 - The “Timesheets” menu options will be displayed.
- Click the “Go” button next to the "Establish Default Charge Codes” menu option.
 - The “Default Charge Codes” screen will be displayed.

NOTE: The list of charge codes will only consist of charge codes authorized by an administrator. Please inform a timekeeping administrator if additional charge codes are needed for the timesheet.

NOTE: To view charge code details, click the “View Details” button. To return to the summary version of the “Default Charge Codes” screen, click the “Hide Details” button.

- Click the checkbox(es) to the left of the charge codes that will be displayed on the timesheets by default.
 - NOTE: The “Select All” button at the bottom of the screen may be used to select all of the charge codes. Individual charge codes may then be included or excluded from selection as necessary.
- Click the “Submit” button to save selections.

NOTE: The default charge codes can be changed at any time. Authorized charge codes can also be added to the timesheet without having to display the charge codes by default (See [“Adding a New Charge Code to a Timesheet”](#)).

Editing an Open Timesheet

NOTE: The “Edit an Open Timesheet” menu option can be used to return to the current timesheet if another screen is currently displayed.

NOTE: The “Edit an Open Timesheet” menu option is also used when an open timesheet outside of the current period needs to be edited and/or submitted. For example, if a timesheet was not submitted on the last day of the period, the timesheet will need to be selected from the “Edit an Open Timesheet” drop down menu in order to be submitted.

- Click the "Timesheets" menu.
 - The “Timesheets” menu options will be displayed.
- Select the appropriate period from the “Edit an Open Timesheet” drop down list.
- Click the “Go” button next to the "Edit an Open Timesheet” menu option.
 - The selected timesheet will be displayed and can be edited.
- Click the cell at the intersection of the appropriate charge code line and the appropriate date column to enter hours.
 - The “Timesheet Entry Detail” screen will be displayed.
 - “Hours” – Enter the number of hours worked.
 - “Date” – The date will correspond to the date column selected.
 - “Internal Comments” – Enter comments that may be relevant to the company internally.
 - “External Comments” – Enter comments that may be relevant to external parties such as clients.

NOTE: The “Hours” field is required. The “Internal Comments” and “External Comments” fields are optional.

NOTE: If the date or charge code is incorrect, either can be changed on this screen using the “Date” drop down list or the “Select a Different Cost Code” button, respectively.

- Click the “Save” button.
 - The timesheet will be displayed with the updated information.

Adding a New Charge Code to a Timesheet

- From the timesheet, click the “Add New Charge Code” button.
 - The “Charge Codes” screen will be displayed.

NOTE: The list of charge codes will only consist of charge codes authorized by an administrator. Please inform a timekeeping administrator if additional charge codes are needed for the timesheet.

- Click “Charge Code Description” or “Charge Code” to select the appropriate charge code from the list.
 - The “Timesheet Entry Detail” screen will be displayed.

- “Hours” – Enter the number of hours worked.

NOTE: If adding a charge code to the current period timesheet, the “Date” field will display today’s date by default. Otherwise, the “Date” field will display the first date of the timesheet’s pay period by default.

- “Internal Comments” – Enter comments that may be relevant to the company internally.
- “External Comments” – Enter comments that may be relevant to external parties such as clients.

NOTE: The “Hours” field is required. The “Internal Comments” and “External Comments” fields are optional.

NOTE: If the date or charge code is incorrect, either can be changed on this screen using the “Date” drop down list or the “Select a Different Cost Code” button, respectively.

- Click the “Save” button.
 - The timesheet will be displayed with the updated information.

Correcting an Error on a Timesheet

- From the timesheet, click the hours in the date column of the charge code row where the correction is required.
 - The “Entries” screen for the charge code for that day will be displayed.
- Click the hours, internal comments, external comments or date & time entered values of the entry that needs to be corrected.
 - The “Timesheet Edit Detail” screen will be displayed.
- Make adjustments to the “Hours”, “Date”, “Cost Code”, “Internal Comments” and/or “External Comments”.
- Click the “Save” button.
 - The “Edit Time Entry” screen will be displayed.
- Enter the reason for the correction(s) in the “Reason” field.
- Click the “Ok” button to save correction(s).
 - The timesheet will be displayed with the updated information.

NOTE: The original entry will be saved in an audit trail along with the reason for the change. The audit trail of changes can be shown and hidden by clicking the “Show Audit Trail” or “Hide Audit Trail” button that will appear below the timesheet.

Deleting an Error on a Timesheet

- From the timesheet, click the hours in the date column of the charge code row where the deletion is required.
 - The “Entries” screen for the charge code for that day will be displayed.
- Click the hours, internal comments, external comments or date & time entered values of the entry that needs to be deleted.
 - The “Timesheet Edit Detail” screen will be displayed.
- Click the “Delete” button.
 - The “Edit Time Entry” screen will be displayed.
- Enter the reason for the deletion in the “Reason” field.
- Click the “Ok” button to save the deletion.
 - The timesheet will be displayed with the updated information.

NOTE: The original entry will be saved in an audit trail along with the reason for the deletion. The audit trail of changes can be shown and hidden by clicking the “Show Audit Trail” or “Hide Audit Trail” button that will appear below the timesheet.

Submitting a Timesheet for Approval

NOTE: A timesheet should be submitted for approval after it has been completed at the end of the period.

- From the timesheet, click the “Submit for Approval” button.
 - The “Submit Timesheet” certification screen will be displayed.
- Click the “Submit” button.
 - The “Your Timesheet Has Been Submitted” message will be displayed above the timesheet. The Primary Approver and, if appropriate, the Primary Project Approver(s) will receive e-mail notifications when the timesheet is submitted.

Retrieving a Submitted Timesheet

NOTE: If a timesheet has been submitted for approval by mistake or if it is discovered that there are one or more errors on the timesheet, it can be retrieved until it has been approved and locked by the administrator. After a timesheet has been retrieved, it will need to be resubmitted for approval. The Primary Approver and, if appropriate, Primary Project Approver(s) will receive e-mail notifications when a timesheet that had been previously submitted has been retrieved, and they will also receive e-mail notifications when the timesheet is resubmitted.

- Click the "Timesheets" menu.
 - The “Timesheets” menu options will be displayed.
- Select the appropriate timesheet period from the "Retrieve a Submitted Timesheet" drop down list.
- Click the “Go” button next to the "Retrieve a Submitted Timesheet” menu option.
 - The “Retrieve Timesheet” confirmation screen will be displayed.
- Click the “Ok” button to retrieve the timesheet from the approval process.
 - The “Your Timesheet Has Been Retrieved” message will be displayed above the menu.
- Use the [“Editing an Open Timesheet”](#) procedure (above) to make changes to the retrieved timesheet.

Editing a Disapproved Timesheet

NOTE: An e-mail notification will be sent if a timesheet has been disapproved.

- Click the “Timesheets” menu.
 - The “Timesheets” menu options will be displayed.
- Click the “Go” button next to the “Edit a Disapproved Timesheet” menu option.
 - Entries for the selected “Disapproved Timesheet” will be displayed along with the “Disapproval Comment”.

NOTE: The oldest disapproved timesheet will be displayed by default. If the desired timesheet period is not immediately visible, use the “Select Another Period” drop down list to navigate to the appropriate disapproved timesheet.

NOTE: Timesheet entries may be sorted by clicking the “Sort By Charge Code” or “Sort By Work Date” buttons at the bottom of the screen.

NOTE: If a timesheet was disapproved by mistake, it can be resubmitted without editing by clicking the “Resubmit Timesheet” button.

- Click the “Edit Timesheet” button at the bottom of the screen in order to edit and resubmit the timesheet.
 - The selected timesheet will be displayed and can be edited.

Viewing a Timesheet (Read Only)

NOTE: Both open timesheets and timesheets that have previously been submitted can be selected and viewed from the “View a Timesheet (Read Only)” menu.

- Click the “Timesheets” menu.
 - The “Timesheets” menu options will be displayed.
- Click the “Go” button next to the “View a Timesheet (Read Only)” menu option.
 - The “Select a Pay Period” screen will be displayed.

- Click the timesheet period desired.

NOTE: If the desired timesheet period is not immediately visible, use the vertical scroll bar or click the left or right arrow buttons to navigate to the appropriate timesheet period.

- Click the “Select” button.
 - The selected timesheet will be displayed.

NOTE: The “Show Audit Trail” button will be displayed if changes have been made to the timesheet and the button can be clicked to display the audit trail of changes for the timesheet.

NOTE: Timesheet comments may be viewed by clicking the “Show Comments” link at the bottom of the timesheet.

NOTE: A printer-friendly version of individual timesheets may be viewed by clicking the “Printer-Friendly Version” link at the bottom of the timesheet.

NOTE: A PDF version of individual timesheets may be viewed by clicking the “PDF” link at the bottom of the timesheet.

Displaying the Current Timesheet

NOTE: The “Home” menu is a shortcut to display the current timesheet. The current timesheet can be displayed regardless of whether or not the timesheet is open for editing, submitted or locked.

- Click the “Home” menu.
 - The current timesheet will be displayed.

Creating a Timesheet

NOTE The “Create a New Timesheet” menu option is used only when a timesheet needs to be created outside of the current period. The current period timesheet will be created and displayed automatically after logging in the first time during each pay period.

- Click the "Timesheets" menu.
 - The “Timesheets” menu options will be displayed.
- Click the “Go” button next to the "Create a New Timesheet" menu option.
 - The “Select a Pay Period” screen will be displayed.

- Click the period desired for the new timesheet.

NOTE: If the desired timesheet period is not immediately visible, use the vertical scroll bar or click the left or right arrow buttons to navigate to the appropriate timesheet period.

- Click the “Select” button.
 - The “Timesheet Created” message will be displayed.

Exporting Time Detail Information

- Click the “Timesheets” menu.
 - The “Timesheets” menu options will be displayed.
- Click the “Go” button next to the “Time Detail Export Data” menu option.
 - The “Time Detail Export” screen will be displayed with the following selection criteria.
 - “Date From” – Enter the beginning date information.
 - “End Date” – Enter the end date information.
 - “Task No. From” – Enter the task number from information.
 - “Task No. To” – Enter the task number to information.
 - “Account No. From” – Enter the account number from information.
 - “Account No. To” – Enter the account number to information.

NOTE: The "Date From" and "End Date" fields are required. All other fields are optional. Enter criteria in the "From" or "To" fields or both to further filter data in the result set.

- Click the “Download” button.
 - A “File Download” dialog box will be displayed.
- Click the “Open” button.
 - The selected time details will be displayed.

Making an Open Timesheet Inactive

NOTE: An open timesheet can be made inactive, which for practical purposes means deleting the timesheet with an audit trail. A timesheet cannot be reactivated once it has been made inactive, but a new timesheet can be created for the same period if necessary.

- Click the “Timesheets” menu.
 - The “Timesheets” menu options will be displayed.
- Select the appropriate period from the “Make an Open Timesheet Inactive” drop down list.
- Click the “Go” button next to the “Making an Open Timesheet Inactive” menu option.
 - The “Delete Timesheet” confirmation screen will be displayed.

NOTE: Once a timesheet is deactivated, it CANNOT be reactivated.

- Enter the reason for deleting the timesheet.
- Click the “Ok” button to make the timesheet inactive.
 - The “Your Timesheet Has Been Made Inactive” message will be displayed above the “Timesheets” menu.