



astutepayroll

**Approvers'
Mini-Help Guide**

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Overview

astutepayroll.com is a web cloud based software that assists PEER to manage the administration of their apprentice and trainee employment business.

As an Astute Approver you are likely to be a manager who is responsible for approving timesheets and leave for PEER apprentices/trainees placed in your business by PEER.

Approvers will either be the designated Primary Approver, or a nominated Secondary Approver

- Primary Approvers are the main person responsible for this task.
- Secondary Approvers provide a backup in case the Primary Approver is unable to complete their tasks.

As an Approver, the system enables you to approve Timesheets and Leave by email or online, and to access reports relating to your apprentices/trainees.

This Mini-Help Guide is designed to give Approvers a quick overview of the key functions on the system. For more details please refer to the relevant full Help Guide.

Your system contains the following sections listed below.

Menu	Description
Dashboard	Provides you a quick snap-shot of information about apprentices assigned to you, their respective job(s), and all related Timesheet(s) / Leave(s).
Timesheets	Allows you to approve Timesheets and view Timesheet history.
Expenses	PEER is not utilising this system functionality.
Leave	Allows you to approve Leave and view Leave history.
Reports	Provides access to a range of reports relating to the apprentices who work for you. You can also access previous timesheets and batch them into PDFs
Profile	Allows you to view and edit information relating to your own profile.

Getting Started

PEER will set up access for you on the system. This will automatically send you an email with your login details. If you have not received this email please check your Junk Folder in your email application then contact PEER.

The new user email will provide you with:

- Your username (formatted as “FirstName.LastName”)
- A link to set up your password and security questions.
- The relevant URL to login with once you have set up your password (this URL for logging on will remain constant – it is recommended to add it to your favourites in your browser)

Note: The links in this email expire after 7 days.

Dear Eddy,

Welcome to the Plumbing, Electrical, Electronic & Refrigeration Vocational Education, Employment & Training Inc online attendance management system.

This email confirms your access has been activated for all apprentices placed with you by Plumbing, Electrical, Electronic & Refrigeration Vocational Education, Employment & Training Inc.

Using our online system to approve and/or query timesheets will save you time and effort, and ensure your apprentices always have up-to-date timesheets.

You will be able to **approve timesheets via emails that will be sent to you** OR by **logging in to your account**.

Your user ID is: eddy.employer

You need to setup your password here: https://peer_michael.astutepayroll.com/security/password/set-password/token/D960BB09A9CC18600F0A

Once your password is setup visit https://peer_michael.astutepayroll.com/login to log in.

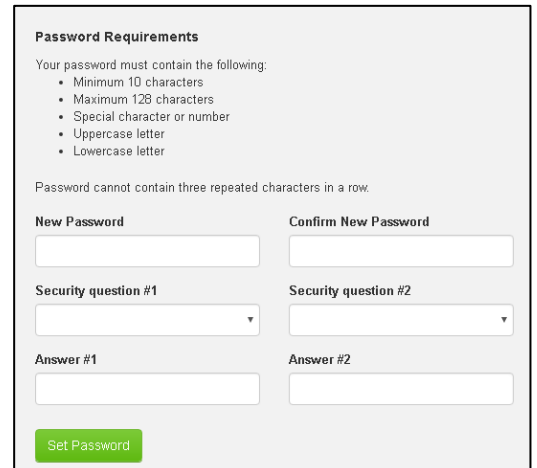
We thank you for the opportunity to provide our services to you.

If you have any queries regarding this process please contact us on 0883481200.

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Setting Up Your Password

1. You will see a password setup screen that looks like this image.
 - a. Type in your new password ensuring it contains a minimum of 10 characters, an upper and lowercase letter and a special character or number.
 - b. You can then re-enter your password as confirmation.
2. Select an option for the 2 security questions and associated answers.
3. Once all fields have been completed you can select the "Set Password" option.



Password Requirements

Your password must contain the following:

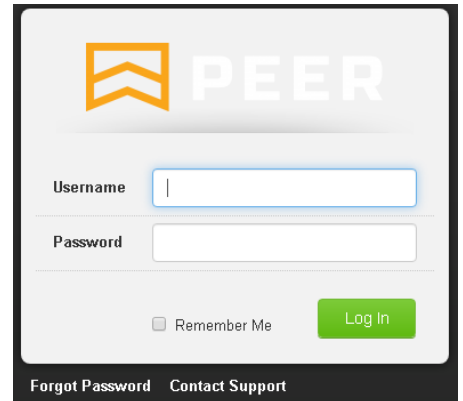
- Minimum 10 characters
- Maximum 128 characters
- Special character or number
- Uppercase letter
- Lowercase letter


Password cannot contain three repeated characters in a row.

New Password	Confirm New Password
<input type="text"/>	<input type="text"/>
Security question #1	Security question #2
<input type="text"/>	<input type="text"/>
Answer #1	Answer #2
<input type="text"/>	<input type="text"/>

Logging In

1. You will see a login screen that looks like this image.
 - a. If you forget your Username or Password, select 'Forgot password'.
 - b. You can then enter your username or email address and your details will be sent to your registered email address.
2. When logging in you may be presented with Terms and Conditions that you need to review and acknowledge.
3. Once logged in, you can change your password in the profile section. You are not able to change your username.





Username

Password

Remember Me

[Forgot Password](#) [Contact Support](#)

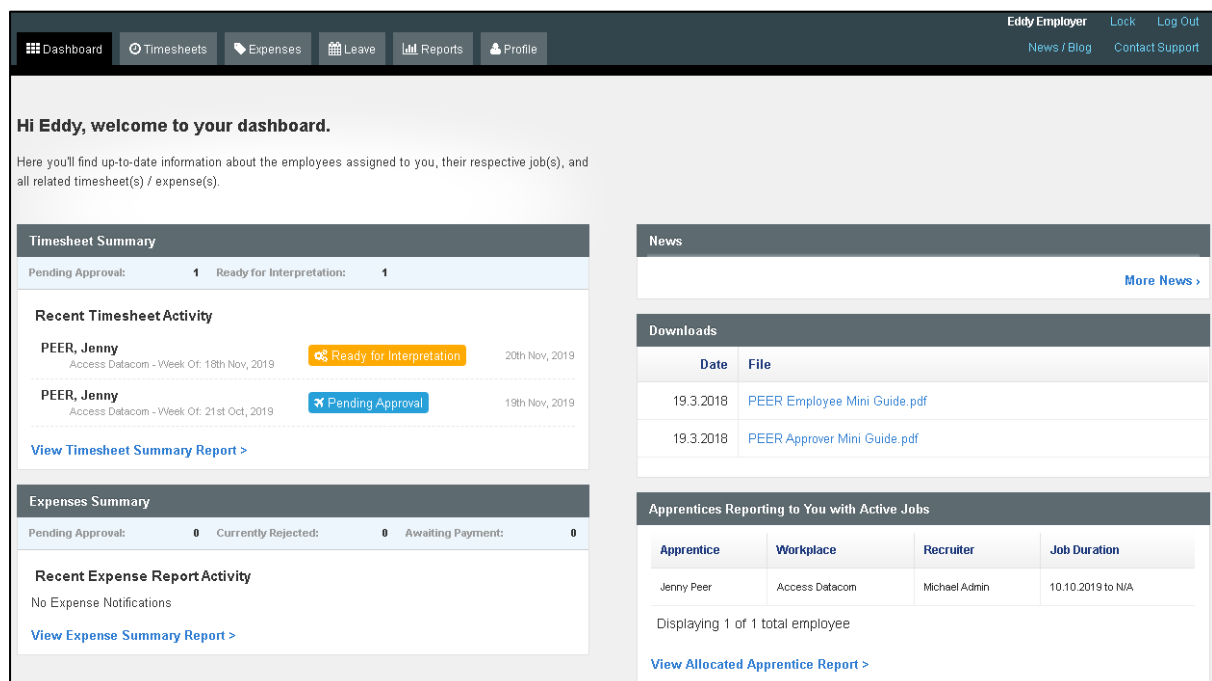
Dashboard



The Dashboard is the home page of the system and provides a snapshot of what is happening on the system and a way to quickly access commonly used tasks.

The table below describes the functions of the Dashboard.

Function	Description
Timesheet Summary	Provides a summary of recent Timesheet activity. Click on the date to be taken to the relevant Timesheet or use the View Timesheet Summary Report link for a full listing of historical and future timesheets.
Expenses Summary	PEER is not utilising this system functionality, and this segment is not covered in the user guide.
News	Displays notices and news items. This is designed to be a regularly updated snapshot of your firm's news.
Downloads	This is a document library compiled by PEER for your reference.
Apprentices Reporting to You with Active Jobs	Provides a list of all allocated apprentices/trainees as Primary or Secondary Approver. Use the View Allocated Apprentice Report link for a filterable listing of allocated apprentices/trainees.



The screenshot shows the PEER dashboard for an 'Eddy Employer'. The top navigation bar includes 'Dashboard', 'Timesheets', 'Expenses', 'Leave', 'Reports', and 'Profile'. On the right, there are links for 'Eddy Employer', 'Lock', 'Log Out', 'News / Blog', and 'Contact Support'.

The main content area is titled 'Hi Eddy, welcome to your dashboard.' and includes a brief description: 'Here you'll find up-to-date information about the employees assigned to you, their respective job(s), and all related timesheet(s) / expense(s).'

The dashboard is divided into several sections:

- Timesheet Summary:** Shows 'Pending Approval: 1' and 'Ready for Interpretation: 1'.
- Recent Timesheet Activity:** Lists two entries for 'PEER, Jenny' at 'Access Datacom'. The first entry (20th Nov, 2019) is 'Ready for Interpretation', and the second (19th Nov, 2019) is 'Pending Approval'.
- Expenses Summary:** Shows 'Pending Approval: 0', 'Currently Rejected: 0', and 'Awaiting Payment: 0'.
- Recent Expense Report Activity:** States 'No Expense Notifications'.
- News:** A section with a 'More News >' link.
- Downloads:** A table listing two PDF files: 'PEER Employee Mini Guide.pdf' and 'PEER Approver Mini Guide.pdf', both dated 19.3.2018.
- Apprentices Reporting to You with Active Jobs:** A table with columns for 'Apprentice', 'Workplace', 'Recruiter', and 'Job Duration'. It lists 'Jenny Peer' at 'Access Datacom', recruited by 'Michael Admin' for a duration of '10.10.2019 to N/A'. Below the table, it says 'Displaying 1 of 1 total employee' and provides a 'View Allocated Apprentice Report >' link.

Timesheets



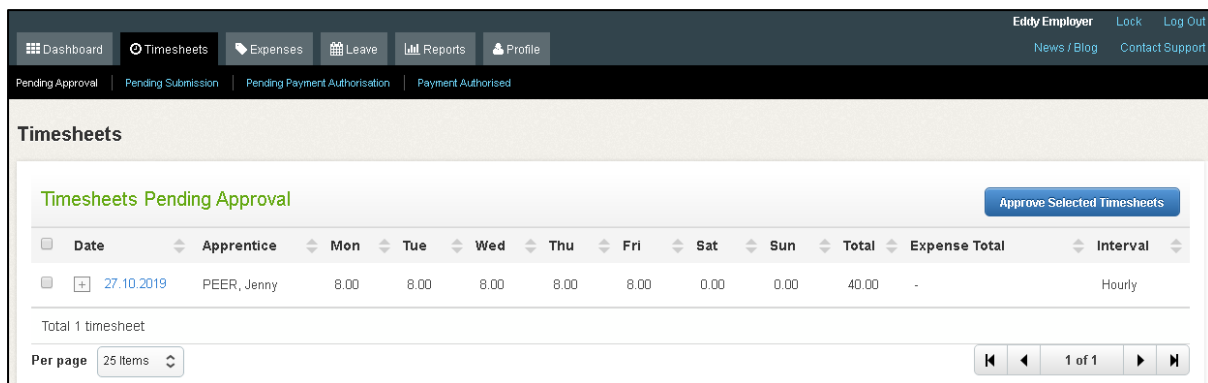
Timesheet data can be presented in two formats.

- Recorded Time – Generally shows starting and ending times, breaks and total hours worked
- Interpreted Data – Breaks down the data into more detail to reflect the different pay elements of ordinary and overtime and associated allowances.

There are two main ways in which a Primary Approver may approve a Timesheet, these are directly from the email notification or by logging into the Astute system.

Once a Timesheet is approved, it will be ready for payroll processing.

If a Timesheet is rejected, it will be returned to the apprentice/trainee for correction and resubmission. If rejecting a timesheet please provide the reason in the notes as guidance for the apprentice/trainee to correct their timesheet.



The Timesheet tab has the following screen options:

- Pending Approval – a list of apprentice/trainee timesheets that require approval by yourself as either the Primary or Secondary Approver so it can be processed and paid by PEER. Note that pressing the + and – symbol by the Date will toggle the Timesheet data between the Interpreted Data and Recorded Time.
- Pending Submission – a list of all historical outstanding and future timesheets that have not been submitted for approval by the apprentice/trainee. Sorting by Date will bring any outstanding Timesheets that require action to the top of the list.
- Pending Payment Authorisation – a list of all authorised timesheets which have not been placed by PEER into an authorised pay run for apprentice/trainee payment and Host Employer invoicing.
- Payment Authorised – a historical list of authorised timesheets for payment by PEER.

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Approval By Email

This is the most popular method for approving Timesheets and can be done from anywhere that you can access your email account, such as your mobile phone.

When an apprentice submits a Timesheet, the system will automatically send the Primary Approver an email with the Timesheet and an option to Approve or Reject the Timesheet by email, or by logging into the system.

Employee:	Jenny Peer
Week ending:	24 Nov 2019
Workplace:	Access Datacom
Job Title:	Not provided

Recorded Time

Day	Start	Finish	Breaks	Total
Monday	08:30	17:00	30 min	8 hr
Tuesday	08:30	17:00	30 min	8 hr
Wednesday	08:30	17:00	30 min	8 hr
Thursday	08:30	17:00	30 min	8 hr
Friday	08:30	17:00	30 min	8 hr
Saturday	No time recorded			0.00 hr
Sunday	No time recorded			0.00 hr
Total:				40.00 hr

Interpreted Data

Pay Item	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Week
Base Hourly (Hr)	8.00	8.00	8.00	8.00	8.00			40.00
Total Hours	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00

Notes for this period

No notes were entered for this period

[View all timesheets pending approval](#)

You may also [log in to your portal](#) to approve this record and/or view other information.

If you have any queries regarding this timesheet and/or the process please contact us on 0883481200.

PLEASE NOTE: You must see a web browser open and a confirmation of success of your approval/rejection

Mini-Help Guide - Approvers

When you click Approve or Reject from the within the email a webpage will open. If this does not happen then the action has not been registered and you will need to login to the system to complete the approval/rejection.

When you reject a Timesheet from the email, the web page that opens will provide a field for you to provide a reason.

Please note: if your employee has attached a file to their electronic timesheet (e.g. a signed paper copy of the timesheet, a medical certificate or other proof of work), you will be required to log in to the portal and approve the timesheet.

Approval By Logging In

This option is typically only used for people approving multiple Timesheets as it enables you to bulk approve. It is also the only way that Secondary Approvers can approve or reject timesheets.

To action Timesheets through the system, select the 'Timesheets' tab and the 'Pending Approval' option then either:

- Click on the Date link for an individual leave line, this will then display detailed Recorded Time information, and click 'Reject' or 'Approve'; or
- Select the check box for each Leave form(s), or the select all box in the header row, and select 'Approve Selected Timesheets' option (Reject function not available from this screen).

Your apprentices/trainees will be notified by email that you have approved/rejected their timesheet.

Secondary Approvers

If you are listed as a Secondary Approver, you will not receive the timesheet approval email with the integrated approval button/link. The email you will receive will be a reminder to approve the timesheet directly by logging into the portal.

Automated Reminders

If a Timesheet (requiring approval) has not been actioned by 12.30pm Monday, the Primary Approver will receive a system generated reminder. If a Primary Approver has not actioned a Timesheet by 2.00pm Monday, the Secondary Approver will receive a system generated reminder.

Once a Timesheet is approved, it will be ready for payroll. If a Timesheet is rejected, it will be returned to the apprentice/trainee for correction and resubmission. If rejecting a timesheet please provide the reason in the notes as guidance for the apprentice/trainee to correct their timesheet.

Leave



The Leave tab has two sections, one showing the Leave Balances for all assigned apprentices/trainees and the second listing all of the Leave Requests associated with those apprentices/trainees assigned either as their Primary or Secondary Approver.

Prior to any Leave application being provided to the Primary Approver it will be reviewed by PEER Payroll to ensure the apprentice/trainee has an adequate leave balance and there are no trade school conflicts.

There are two main ways in which a Primary Approver may approve a Leave application, these are directly from the email notification or by logging into the Astute system and accessing the Leave tab.

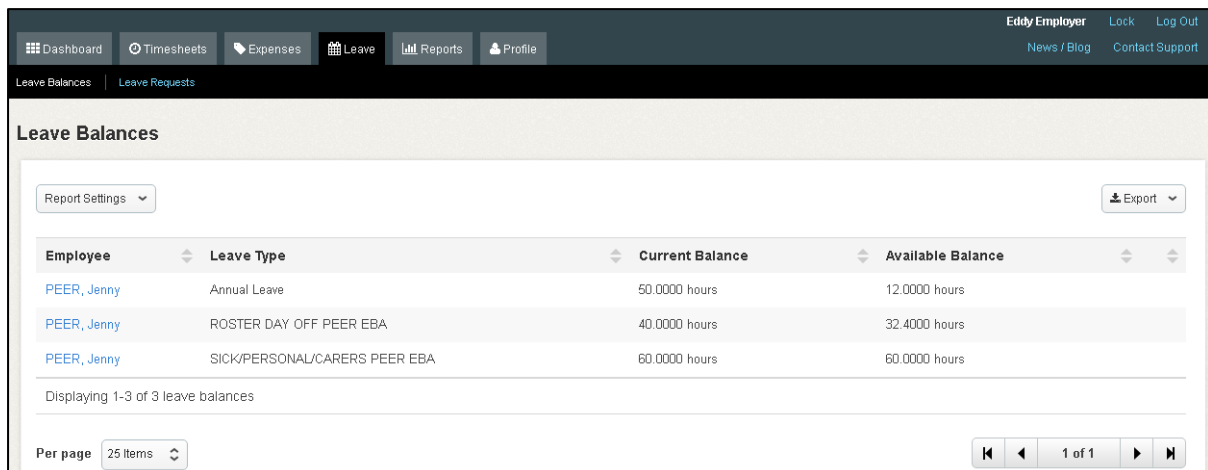
Once Leave is approved, it will be ready for payroll processing.

If Leave is rejected, it will be returned to the apprentice/trainee for correction and resubmission. If rejecting a timesheet please provide the reason in the notes as guidance for the apprentice/trainee to correct their leave request.

Leave Balances

Leave balances lists the leave balances for each leave type of an associated apprentice/trainee. The difference between the Current and Available Balance is the Available Balance includes leave forms which have not yet been approved or taken.

You can narrow and sort your search through the 'Report Settings' drop down option. Filters applicable are by Host Employer organisational segments (if set up by PEER) and by individual apprentice.



Employee	Leave Type	Current Balance	Available Balance
PEER, Jenny	Annual Leave	50.0000 hours	12.0000 hours
PEER, Jenny	ROSTER DAY OFF PEER EBA	40.0000 hours	32.4000 hours
PEER, Jenny	SICK/PERSONAL/CARERS PEER EBA	60.0000 hours	60.0000 hours

Displaying 1-3 of 3 leave balances

Per page: 25 items

1 of 1

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Leave Requests

Leave Requests provides a listing of all leave forms and their status and incorporates the ability to approve leave.

You can narrow and sort your search through the 'Report Settings' drop down option. Filters applicable are by Host Employer organisational segments (if set up by PEER), date range, leave status and by individual apprentice.

Leave Requests						
Report Settings	With selected leave requests ...					Export
Date	Employee	Days	Hours	Leave Type	Status	
29 Nov 2019	PEER, Jenny	1	7.6000	ROSTER DAY OFF PEER EBA	Pending Approval	Approve Reject
23 to 27 Dec 2019	PEER, Jenny	5	38.0000	Annual Leave	Pending Approval	Approve Reject

Displaying 1-2 of 2 leave requests

Per page 25 Items

1 of 1

Approval By Email

This is the most popular method for approving Timesheets and can be done from anywhere that you can access your email account, such as your mobile phone.

Leave Request Awaiting Approval

Jenny Peer has submitted a leave request for approval

This email is being sent to you as Jenny Peer requested leave and it needs your approval.

- **Leave Type:** ROSTER DAY OFF PEER EBA
- **First Date of Leave:** 29 Nov 2019
- **Last Date of Leave:** 29 Nov 2019
- **Total Days with Leave Requests:** 1
- **Total Hours Requested:** 7h 36m
- **Current Balance:** 40h 0m
- **Available Balance:** 32h 24m

Date	Job	Standard Day	Leave Requested	Total
Fri 29 Nov 2019	Access Datacom	Not set	9:00 to 16:36	7h 36m

Approve

Reject

You may also [log in to your portal](#) to approve this record and/or view other information.

If you have any queries regarding this leave request and/or the process please contact us on 0883481200.

PLEASE NOTE: You must see a web browser open and a confirmation of success of your approval/rejection - if you do not, you will need to login directly to your portal to complete your action.

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When an apprentice submits a Leave application, the system will automatically send, via a PEER Payroll review, the Primary Approver an email with the Leave details and an option to Approve or Reject the Leave by email, or by logging into the system.

When you click Approve or Reject from the email a webpage will open. If this does not happen then the action has not been registered and you will need to login to the system to complete the approval/rejection.

When you reject a Leave form, the web page that opens will provide a field for you to provide a reason.

Approval By Logging In

This option is typically only used for people approving multiple Leave applications as it enables you to bulk approve. It is also the only way that Secondary Approvers can approve/reject leave.

To action Leave applications through the system, select the 'Leave' tab and the 'Leave Requests' option then either:

- Click the 'Reject' or 'Approve' button next to an individual leave line; or
- Click on the Date of an individual leave line, this will then display additional leave information, and click 'Reject' or 'Approve'; or
- Tick the check box for each Leave forms, or the select all box in the header row, and select 'With Selected Leave Requests' drop down and choose the Approve or Reject option.

Your apprentices/trainees will be notified by email that you have approved/rejected their leave.

Secondary Approvers

If you are listed as a Secondary Approver, you will not receive the leave approval email. You will receive a reminder to log in and approve the leave directly from the portal.

Automated Reminders

If a Leave approval has not been actioned by the Primary Approver they will receive a system generated reminder. If a Primary Approver has not actioned an approval by the required time the Secondary Approver will receive a system generated reminder.

Reports



The Reports module enables you to access reports to assist with the overall management of apprentices/trainees reporting to you.


Reports can be exported to CSV (Excel) format by clicking the 'Export to CSV' function at the top right-hand corner of the screen.

Allocated Apprentices

This report details all apprentices/trainees for whom you are assigned to either as their Primary or Secondary Approver.

It also lists the:

- Workplace if separate job sites have been set up by PEER for the Host Employer organisation.
- Recruiter is the PEER Apprentice & Trainee Co-ordinator assigned to the individual apprentice.
- Job Duration is the current length of the placement with the Host Employer.


Allocated Apprentices				
Approver Reports	Filter Results			Export all to CSV
Allocated Apprentices				
Record Search				
Leave Calendar				
	Apprentice	Workplace	Recruiter	Job Duration
	PEER, Jenny	Access Datacom	ADMIN, Michael	10.10.2019 to N/A
	Total 1 Job			
	Per page	25 Items		

Record Search

Record Search enables you to view all Timesheets in the system for apprentices associated with your Host Employer organisation (where you are either the Primary or Secondary Approver).

You can narrow and sort your search through the 'Filter Results' drop down option. Filters applicable are by individual apprentice and specified date ranges.

You are also able to select one, multiple or all timesheets and export these to PDF. Timesheets are selected by using the tick boxes and running the export from the 'Export Selected as PDFs' button.

Record Search						
Approver Reports	Show Details Show Hours			Export all to CSV		
Allocated Apprentices	Export Selected as PDFs		Filter Results			
Record Search						
Leave Calendar						
	<input type="checkbox"/>	Date	Apprentice	Workplace	Status	Payable Type
	<input type="checkbox"/>	24.11.2019	PEER, Jenny	Access Datacom	Pending Approval	40.00 Hourly
	Total 1 timesheets					
	Per page	25 Items				

Mini-Help Guide - Approvers

Leave Calendar

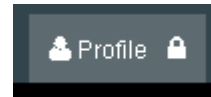
The Leave Calendar report enables you to view all leave in the system for apprentices associated with your Host Employer organisation (where you are either the Primary or Secondary Approver) consolidated into a calendar view. Leave blocks will be colour coded on the calendar to show Pending, Approved and Taken leave.

You can narrow and sort your search through the 'Report Settings' drop down option. Settings applicable are by Host Employer organisational segments (if set up by PEER), specified date ranges, leave status types and individual apprentices.

You are also able to click on a leave block in the calendar to display more detail associated with the specific leave such as total leave taken, type of leave and remaining leave balance available.

Leave Calendar																															
Approver Reports Allocated Apprentices Record Search Leave Calendar			Report Settings ▾																												
			7 Dec, 2019			8 - 14 Dec, 2019							15 - 21 Dec, 2019							22 - 28 Dec, 2019							29 - 31 Dec, 2019				
<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Pending <input type="checkbox"/> Taken			3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
			Le	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue
Jenny Peer																															

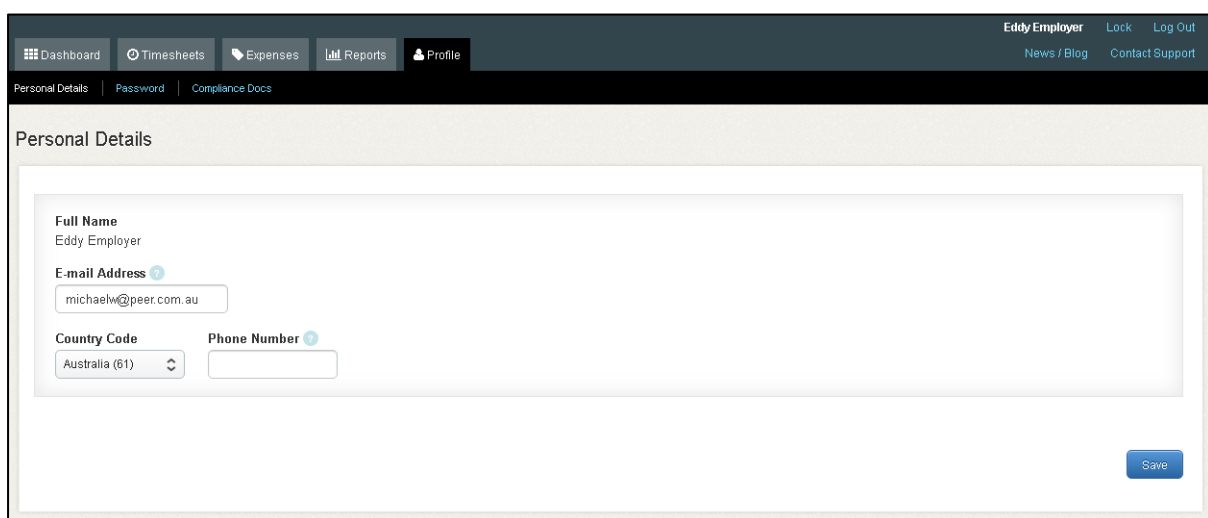
Profile



The Profile Tab is the section where your personal details are kept. PEER maintains the relationship between your Host Employer company and your User profile.

For ease of reference, your profile is separated into the following Tabs:

- Personal Details – name, email address and phone number (Note: the name can only be update by contacting PEER)
- Password – change your password and security questions under this tab
- Compliance Docs – this functionality will not be utilised by PEER.

A screenshot of the PEER web application's profile page. The top navigation bar is dark grey and contains 'Dashboard', 'Timesheets', 'Expenses', 'Reports', and 'Profile' (which is highlighted). On the right of the navigation bar, it says 'Eddy Employer' with 'Lock' and 'Log Out' links, and 'News / Blog' and 'Contact Support' links. Below the navigation bar, there are three sub-tabs: 'Personal Details' (selected), 'Password', and 'Compliance Docs'. The main content area is titled 'Personal Details' and contains a form with the following fields: 'Full Name' (Eddy Employer), 'E-mail Address' (michaelw@peer.com.au), 'Country Code' (Australia (61)), and 'Phone Number'. A blue 'Save' button is located at the bottom right of the form area.