

# Knowledge services

## Getting Started Resource Guide

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OR



Clickable Link to Interactive  
Demo of Task within dotStaff

(Interactive Demo)

## Activate your Account

To activate your account, your company Administrator must first create it  
Once created an activation email is sent with a link to activate the account

1. Click the secure **link** provided in the email
2. **Complete the form** entirely and click **Activate**
3. A success message appears. Click **OK**
4. **Login** utilizing the newly created credentials

*For additional assistance, contact the Support Team at Knowledge Services*



## Retrieve Username [\(Interactive Demo\)](#)

1. From the login screen, click the **Forgot Username?** hyperlink
2. Enter your **email address**
3. Select **Submit**. A message for review appears, click **OK**. Upon clicking ok, an automated email request is sent
4. Locate email with provided username and **click the link** to login
5. Type in provided username and your password
  - a. *If password is unknown, follow the **Reset Password** steps*

*For further assistance, contact the Support Team at Knowledge Services*

## Unlock Account

1. From the login screen, click the **Unlock Account?** Hyperlink
2. Enter your Username
3. Select an unlock option:
  - a. **Unlock via Email:** An email is sent with a code  
*If **Unlock via Email** is selected, then you will click **Send me an email***
  - b. **Unlock via Phone:** An SMS code will be sent to the number on file  
*If **Unlock via Phone** is selected, then you will click **Receive a code via SMS***  
**Note:** *If you have not setup SMS verification, no code will be sent*
4. Enter the provided code into the box and select **Verify**
5. Answer your **Security Question**
6. Enter your **Password**
7. Click **Verify**

*For further assistance, contact the Support Team at Knowledge Services*

## Reset Password

1. From the login screen, enter your **Username**
2. Click **Next**
3. Press the **Forgot Password?** Hyperlink
4. Select a reset option:
  - a. **Reset via Email:** An email is sent with a code  
*If **Reset via Email** is selected, then you will click **Send me an email***
  - b. **Reset via Phone:** An SMS code will be sent to the number on file  
*If **Reset via Phone** is selected, then you will click **Receive a code via SMS***  
**Note:** *If you have not setup SMS verification then this option will not appear*

5. Enter the provided code into the box and select **Verify**
6. Answer your **Security Question**
7. Enter your **New Password** and then **Re-enter** it
8. Click **Reset Password**

*For further assistance, contact the Support Team at Knowledge Services*



## Create a Weekly Timesheet [\(Interactive Demo\)](#)

- Time worked can be entered **daily** to the Weekly Timesheet or **all at once** at the end of the week.
- Time cannot be entered for dates in the future, only current or previous dates.
- When entering time, be certain to pay particular attention to AM and PM. Midnight is 12:00 AM and Noon is 12:00 PM.
- A day's entries cannot be saved without entering a time in the "Time Out" field.
- If recording work performing on more than one Project and/or Category during a single week, the timesheet will need to reflect time worked per distinction.
- Work performed in the same week under different contracts must be recorded, saved, and submitted on separate timesheets.
- A Comments field is available to note details about the timesheet, if needed.
- Additional information specific to the timesheet such as Contract Details, Status History, and Approval History is available via the applicable button at the top of the timesheet.

1. Navigate to **Time\Projects >Add Time**
2. In the \*Select Week area, if the date displayed is not during the week for which you wish to enter time, click the **calendar icon** and select that week.
3. As a Resource, your name should display in the **Resource** field
4. If you work from one contract, it should appear in the **Contract** field. If you do have multiple contracts:
  - a. Work performed in the same week under different contracts must be recorded, saved, and submitted on separate timesheets.
  - b. Be certain to select the correct contract for the time/day you are recording.
5. If you work from one Project, it should appear in the **Project** field, otherwise, use the drop-down to select the proper Project for your entry.
 

*You may be assigned to multiple Projects. If so, be careful to select the correct Project for the time/day to be entered.*
6. Having selected the Project, *Time Entry* should display in the Category field. If not, select the Category using the dropdown available.
 

*A Comments field is available for any timesheet details to be noted.*
7. Complete the time entries for the shift. Click into the **Time In** cell to begin. The Time Picker will appear, enabling you to simply click on the correct hour, or you may type directly into the cell to note the time.
8. If a break was taken, note the start time of that break in the Break Out field and use the Break In field to enter the time you resumed your shift for that day.
 

*If you didn't take a break, simply leave the Break Out and Break In Fields blank.*
9. Enter the time you ended your shift in the **Time Out** field.

*When entering time, be certain to pay particular attention to **AM** and **PM**.*

*Midnight is 12:00 AM and Noon is 12:00 PM.*

10. As time worked is recorded each day, click the **Save as Draft** button to retain any additions or edits made to the week's timesheet.
11. When you are finished working for the week, be sure to click **Submit For Approval**.

***Once approved, time will no longer be editable. Contact your Employer for further assistance if time is needing updated after approval.***



## Create an Overnight Time Entry [\(Interactive Demo\)](#)

For a shift that begins on one day, extends beyond midnight, and ends the next, enter the **Time In** and **Time Out** times on the day the shift began.



## Create a Daily Time Entry when charging “by the Unit” [\(Interactive Demo\)](#)

- When working from a contract in which pay is calculated based on **By the Unit** charging, the time fields will be replaced with the Duration field.
- To record **units of work** (such as charts, home visits, or carts), click and type directly into the “Duration” cell for the appropriate day.
- As units worked is recorded each day, click the **Save as Draft** button to retain any additions or edits made to the week's timesheet.
- Once all work has been recorded for the week, and the timesheet is ready for submission, click the **Submit for Approval** button.



## Save Time Entry as Draft [\(Interactive Demo\)](#)

1. As time worked is recorded each day, click the **Save as Draft** button to retain any additions or edits made to the week's timesheet
2. A popup window will appear with the message: “*Timesheet Saved Successfully.*” Click **OK**
3. The timesheet will refresh displaying **Draft** as its status
4. Having saved the entries, you may close the timesheet and return to it when ready to record more time worked, or to submit the timesheet for approval

*Time in “Draft” status is not visible to the Manager for approval and must be submitted in order to be approved.*



## Submit Time for Approval [\(Interactive Demo\)](#)

1. Once all time worked for the week has been entered, and the timesheet is ready for submission, click the **Submit for Approval** button
2. A popup window appears with the message: “*Timesheet submitted successfully.*” Click **OK**.
3. The timesheet will refresh with **Awaiting Approval** as its status
4. Having submitted the timesheet, you may close it and if desired, return to it to review its approval status

***Once approved, time will no longer be editable. Contact your Employer for further assistance if time is needing updated after approval.***



## Copy Day [\(Interactive Demo\)](#)

1. Having recorded time worked for a shift, click the **Copy Day** button, adjacent to the time entry fields, to copy the time entry set to additional days in that week
2. The **Copy Day** window will open displaying the time entry set to be copied and check boxes to select the day(s) to which the set is to be copied. Click to **check** the appropriate box or boxes.  
*The time entry set captured for copying will be the last saved shift, or if the timesheet has not yet been saved, it will be the shift from the first day of the week. Remember that time cannot be entered to future dates.*
3. To retain the copy action, click the **Apply** button. The screen will refresh to show the updated timesheet.
4. Click the Save As Draft button to retain a working copy of the updated time sheet, or the Submit For Approval button if it is ready for submission.



## Delete an Entry [\(Interactive Demo\)](#)

1. Having recorded time worked, but finding a need to delete an entry, click the **Delete** button, located adjacent to the time entry fields.
2. The Delete Time window will open. Available will be check boxes to select the day(s) of time to be deleted. Click to **check** the appropriate box or boxes.
3. To retain the delete action, click the **Delete** button. The screen will refresh to show the updated timesheet.  
*If the timesheet has not yet been saved to Draft status, deleting the entry simply requires one to click into the field and remove the entry.*
4. A popup window will appear with the message: “Entries in selected day(s) will be deleted. Are you sure you want to continue?” Click **OK**.
5. Click the Save As Draft button to retain a working copy of the updated time sheet, or the Submit For Approval button if it is ready for submission.



## Create a Timesheet for Multiple Projects [\(Interactive Demo\)](#)

If performing work on more than one Project during a single week, your timesheet will need to reflect time worked per Project.

1. To begin, record the first Project’s applicable time set. See **Create a Time Entry** above
2. Click the **Add Project or Row** button
3. The screen will refresh with a new row of timesheet fields available
4. Follow the standard time entry process for the next project, being mindful to **select the appropriate project**.
5. Click Save As Draft to retain a working copy of the updated timesheet, or the Submit For Approval button if it is ready for submission.



## Copy a Weekly Timesheet [\(Interactive Demo\)](#)

1. Navigate to **Time\Projects >Add Time**
2. If the date displayed is not during the week for which you wish to enter time, click the **calendar icon** and select that week

3. As a Resource, your name should display in the **Resource** field.
4. If working from one contract, it should appear in the Contract field.  
*If you have multiple contracts, be certain to select the correct contract for the time/day you are recording.*
5. Click the **Copy Week** button. A window will open, displaying a calendar from which a selection can be made.
6. **Select the week** to be copied and click the **Save** button. The Timesheet window will refresh, updated with the copied entries.
7. Click Save As Draft to retain a working copy of the updated timesheet, or the Submit For Approval button if it is ready for submission.



## View Timesheets [\(Interactive Demo\)](#)

1. Navigate to **Time\Projects > View Time**
2. Use the **filter** to bring forward the timesheets of interest
3. Results displayed can be exported to Excel, Word, and Acrobat by clicking **Export** and selecting the type of file. Or perform another search by clicking on the **Search** button.



## Edit a Timesheet [\(Interactive Demo\)](#)

The status of a timesheet determines if it can be edited.

- A timesheet that has already moved beyond Draft or Awaiting Approval to a status of **Denied**, can be edited. However, if a change is made to the timesheet, it will need to be re-submitted for approval (Submit for Approval button). The approval cycle and will begin again for that entry.
- A timesheet that has already moved beyond Draft or Awaiting Approval to a status of **Approved, Invoiced, Paid** or **Complete** cannot be edited. Contact your employer for further assistance.
- A timesheet with a status of **Disputed** will be locked and will not be editable. Only when it has reached a resolution will it again be editable.

1. Navigate to **Time\Projects > View Time**
2. Use the **filter** to bring forward the timesheets of interest
3. **Double click** on the line item that is to be edited. The Timesheet window will open.  
*Before making any edits, verify the timesheet, Contract, Project, and Category selections are correct.*
4. **Edit** the information as needed
5. Click the appropriate button to **Save As Draft**, or if ready, **Submit For Approval**. Wait for the screen to refresh.
6. Once the Success Message appears, click **“OK”**.
  - If all necessary changes have been made, click to close the window.

**OR**

  - Navigate to a different timesheet using the selection fields (Select Day, Enter Time For, Contract, Project, and Category) to continue making edits, if necessary.



## Submit an Expense [\(Interactive Demo\)](#)

Before submitting an expense, contact Your employer to ensure you are eligible to submit an expense. If so, they will need to contact the MSP to have you set up as an Expense Submitter.

- Expenses, such as hotel stay, state tax or gas mileage can be submitted and invoiced in dotStaff™.
  - Pending approval and proper support documentation, expenses are 100% reimbursed.
  - One must be assigned to a project before being set up as an Expense Submitter.
1. Navigate to **Time\Projects > Add Expense**
  2. Complete the fields in the top section. **Use the dropdown field selections** to designate:
    - the **Project** for which the expense was incurred
    - the **Category** of the expense (examples: Food, Travel, Lodging)
  3. The **Total Amount** will auto calculate based upon amount(s) entered in the Expense Items section below
  4. Use the **Description** area to define the expense  
*Example: "Meal expenditures for 5/21/2020 – 5/26/2020"*
  5. **OPTIONAL:** Utilize the Attachment **Browse** button to attach an Expense Reimbursement summary
  6. Scroll to the **Expense Items** section to **INDIVIDUALLY record and attach** expenses
  7. Designate the applicable **Date** and **Expense Type**, enter the **Amount**, and then use the **Browse** button in this area to attach any corresponding documentation  
*Use the "Add Expense" button if another line is needed*
  8. Click **Submit for Approval**