Justlogin HR Cloud

A Guide to eForm (Superadmin User)

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Agenda

- Forms Setup
- Forms Sample Emails Notification
- Forms Administrator
- Forms Report
- Forms Usage (User Perspective)

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Forms Setup

Setting up of Form

Welcome, Jocelyn Ma. | My Role | Help | FAQ | Justlogin Express BETA

justlogin the smarter way to work

eForm | eLeave | eTimecharge | eSurvey | eTimeclock | eAdmin | eStaff | ePayroll | eBenefit

Home

Step 1

Forms | Form History | Action History | Form Administration | Reports | Form Data

Role Selection | Form Library | Email Password Option | Transfer To ePayroll

Form Library

	SNo	Form Name	Form Preview	Print Preview	Workflow Diagram	Status
☐	1.	Overseas Expense Claim Form				Enabled
☐	2.	Smart Local Transport Claim Form				Enabled
☐	3.	Local Expense Claim Form				Enabled
☐	4.	Transport Claim Form				
☐	5.	Medical Claim Form				
☐	6.	Overtime Meals & Transport Reimbursement Form				
☐	7.	Entertainment Claim Form				
☐	8.	Software Upload Request Form				
☐	9.	Petty Cash Claim Form				Disabled

Enable | Disable

Difference between Smart Local and Local Expense is “Smart Local…” is able to calculate the distance automatically. Local Expense is manual input of the distance travelled.

- These are the expense forms available on the module
- Check the box to enable or disable the expense forms
- You should perform this task before selecting your approval tiers and setting the reminders

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Form Administration

- Setup verification officers, approving officers and finance roles for form's approval

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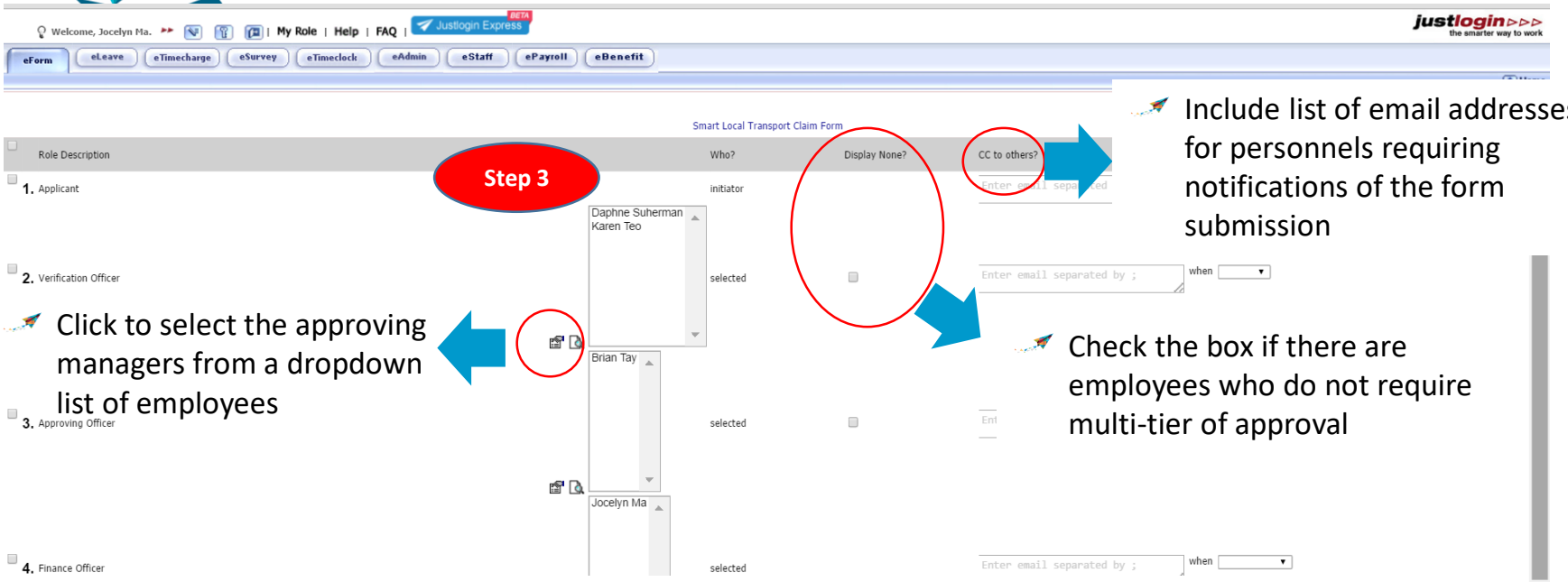
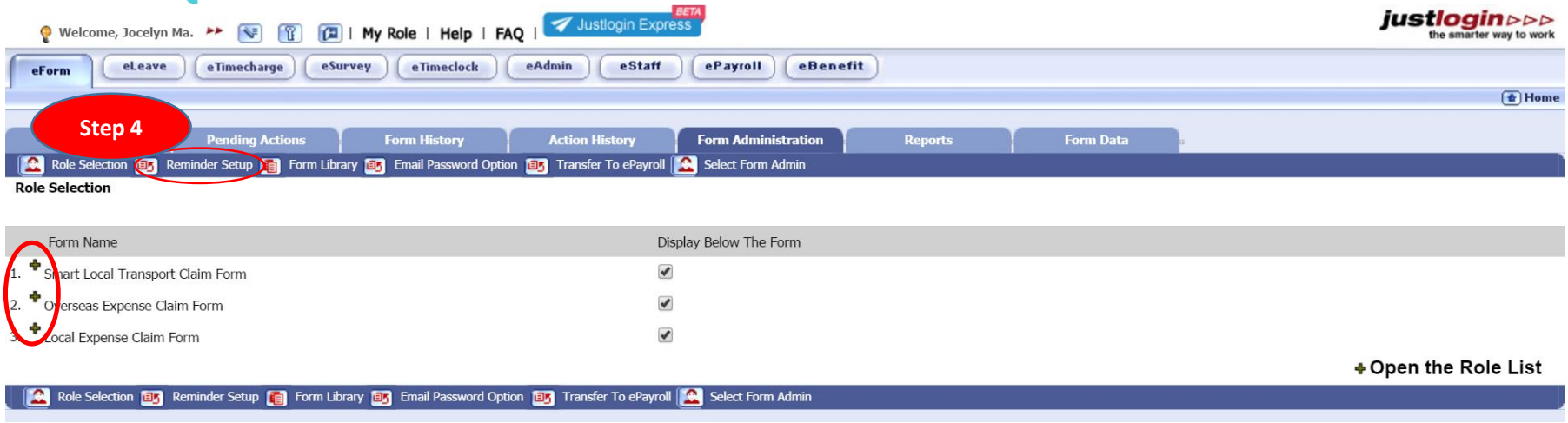
Role Selection



- Include list of email addresses for personnels requiring notifications of the form submission
- Click to select the approving managers from a dropdown list of employees
- Check the box if there are employees who do not require multi-tier of approval

- Applicant would be the employees themselves
- Verification Officer is the first layer of approval upon employees' form submission
- Approving Officer is the second layer of approval, email will be route automatically upon first tier's approval
- Finance officer is the final approval, similarly, email will route automatically upon second tier's approval

Reminder Setup



- Create reminder templates for various approval if there is no action within a day

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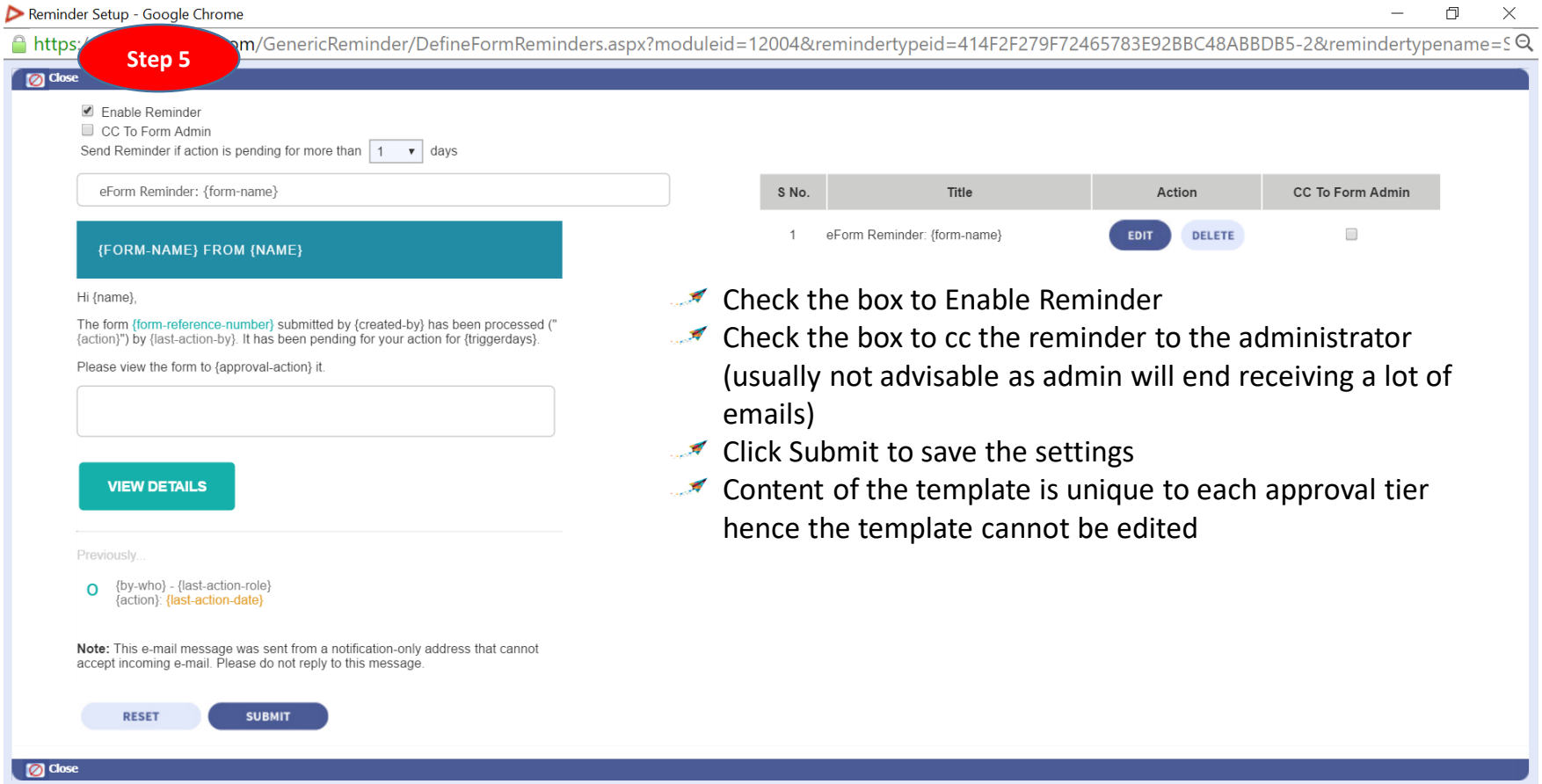
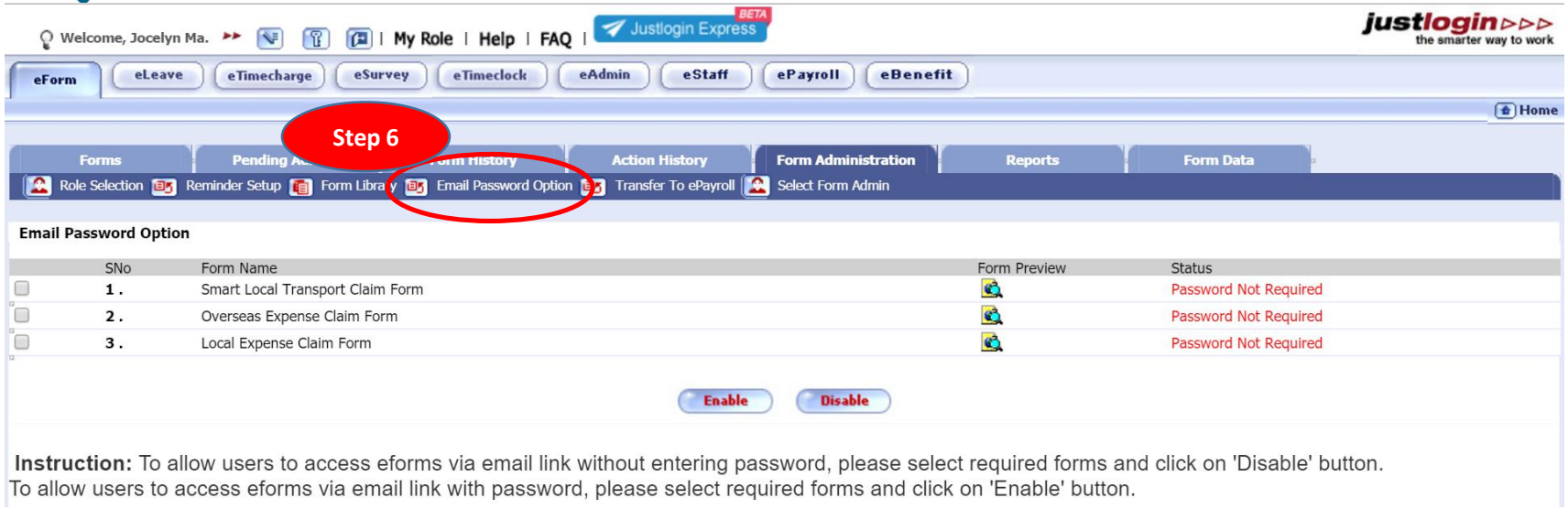
Reminder Setup



- Check the box to Enable Reminder
- Check the box to cc the reminder to the administrator (usually not advisable as admin will end receiving a lot of emails)
- Click Submit to save the settings
- Content of the template is unique to each approval tier hence the template cannot be edited

Email Password Option



- To enable or disable password function for approving managers
- Enable password function means approving managers have to key in a password before they can access the email links from their email
- Disable password means they can access the module and approve through the expenses without the added security

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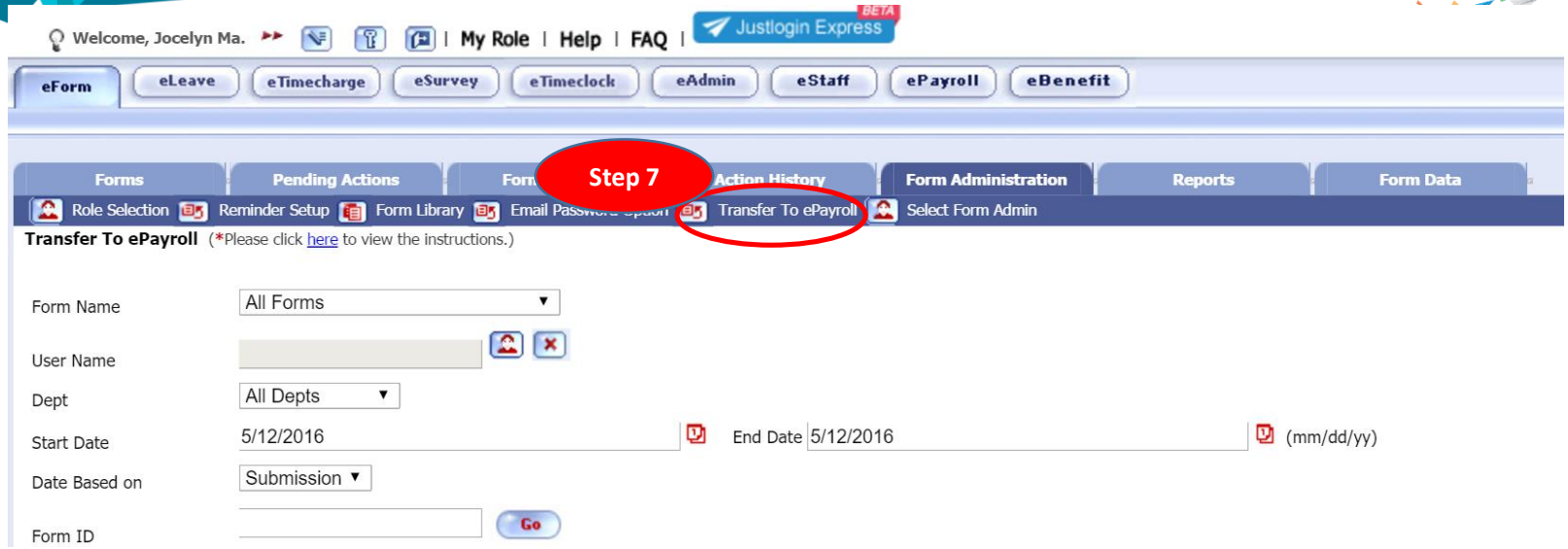
Transfer to ePayroll



- Select the expense form
- Select user or department
- Select a date range
- Select date base
- Click go and generate the data to transfer to ePayroll for processing together with monthly payroll

(This function is only applicable if you are using Justlogin's ePayroll)

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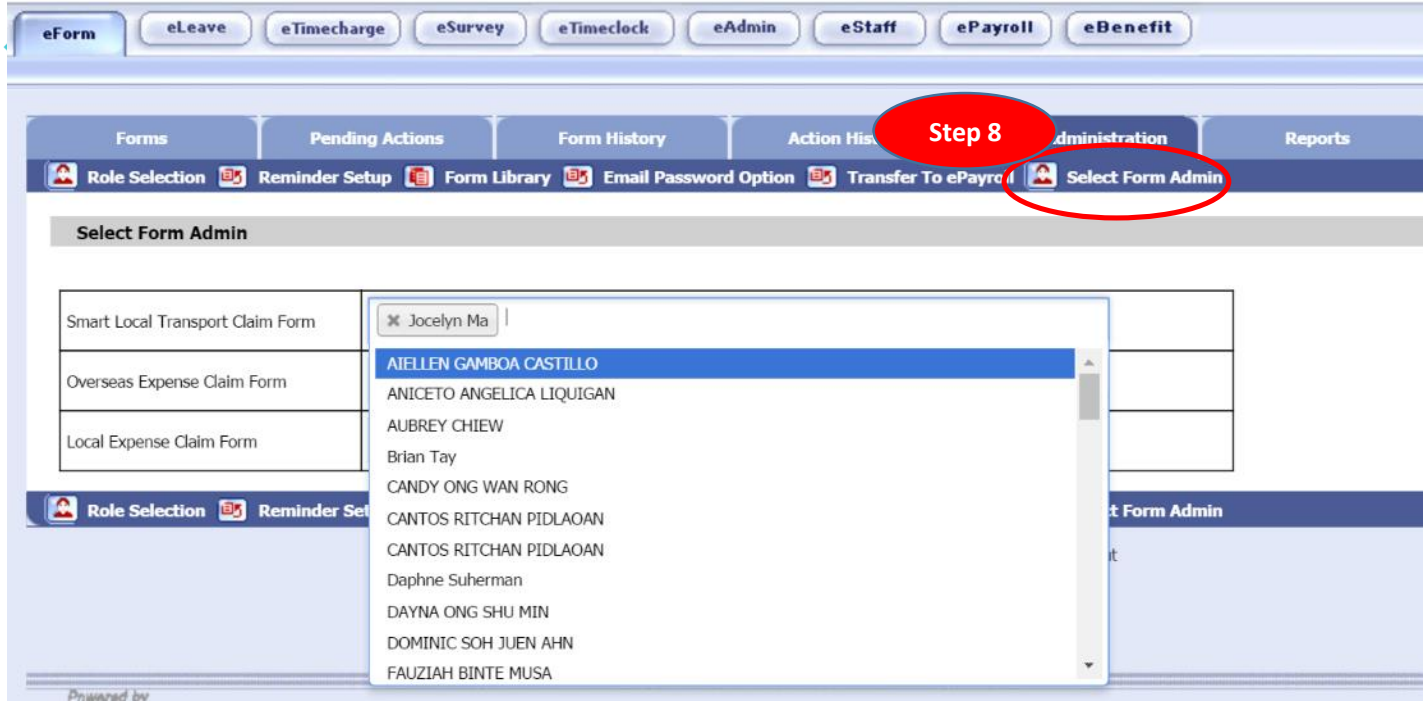
Select Form Admin



- Assign form administrators for the respective expense forms

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Form Data

- Setup the type of currency expense for Overseas Expense Claim Form
- Setup the monthly exchange rate for Overseas Expense Claim Form
- Setup interface's data to sync the expenses to payroll elements

(**This is only applicable for companies using Justlogin's ePayroll)**

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Create or Delete Currency

https://www.justlogin.com/eform1/List_Details.asp - Google Chrome

https://www.justlogin.com/eform1/List_Details.asp

List Name : Currency

Export Value	Display Value
AUD	AUD
EUR	EUR
GBP	GBP
HKD	HKD
INR	INR
JPY	JPY
KRW	KRW
MYR	MYR
NZD	NZD
SGD	SGD
THB	THB
TWD	TWD
USD	USD
RMB	RMB
IDR	IDR
PHP	PHP
VND	VND

Update | Delete | Sort Export value | Sort Display value | Add New Rows

User Name	Access Time	Action
Jocelyn Ma	5/3/2016 4:42:39 PM	Add New
Jocelyn Ma	5/5/2016 4:00:59 PM	Add New
Jocelyn Ma	5/5/2016 4:01:46 PM	Delete Record
Jocelyn Ma	5/12/2016 1:55:35 PM	Delete Record

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Form Data

- Exchange rate needs to be updating on a weekly / monthly basis manually!

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Update Exchange Rate

https://www.justlogin.com/eform1/Exchange_rate.asp - Google Chrome

https://www.justlogin.com/eform1/Exchange_rate.asp

Month : May **Year :** 2016

Base Currency : SGD

No .	Currency	Rate	Sequence
0	AUD	0.99	1
1	EUR	0.64	2
2	GBP	0.51	3
3	HKD	5.73	4
4	INR	49.12	5
5	JPY	78.86	6
6	KRW	853.93	7
7	MYR	2.95	8
8	NZD	1.07	9
9	THB	25.86	10
10	USD	0.74	11
11	RMB	4.79	12
12	IDR	9783.93	13
13	PHP	34.73	14
14	VND	16358.82	15
15	AUD		

Update | Delete | Add New Row | Copy Previous Month Records

User Name	Access Time	Action
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:13:59 PM	Add New
Jocelyn Ma	5/5/2016 4:13:59 PM	Add New
Jocelyn Ma	5/5/2016 4:13:59 PM	Update Record
Jocelyn Ma	5/5/2016 4:10:50 PM	Update Record
Jocelyn Ma	5/5/2016 4:10:50 PM	Update Record

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Form Data

- Interface Setup is mainly for the pay elements (fields) to be setup to be route successfully to ePayroll.

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Interface Expenses with Payroll Elements

justlogin

justlogin.com - Google Chrome

https://www.justlogin.com/eform1/InterfaceToePayroll.asp

Link expense types to pay element IDs:

You can link the Expense Types (typically used in Expense Claim Form) to their respective pay elements set up in ePayroll.

Expense Type	Pay Element ID
Mobile	NA
Medical	NA
Insurance	NA
Transport	NA
Entertainment	NA
Travel - Flight	NA
Travel - Accomodation	NA
Travel - Entertainment	NA
Travel - Local Transport	NA
Per Diem	NA
Travel - Travel Insurance	NA
Travel - Laundry	NA
Travel - Parking & Tolls	NA
Parking & Tolls	NA
Office Expenses - Miscellaneous	NA
Office Equipments	NA

Link forms to expense types:

This is for Forms that have a Total Amount field to be linked to the Expense Type so that the total amount can be linked to Pay Element based on the set up above.

Form	Expense Type	Expense Type Field	Account Code Field	Total Field	Amount Field	GST	Before GST
Local Expense Claim Form	use expense types within the form	Type of Expense	Account Code	Total Amount	NA	GST Amt	Before GST
Overseas Expense Claim Form	use expense types within the form	Type of Expense	Account Code	Local Currency	NA	NA	NA
Smart Local Transport Claim Form	use expense types within the form	Transport Type	NA	Amount	NA	NA	NA

Update Reset

- The expense codes have to sync with the payroll elements in order to map the expense claim data in ePayroll

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Form Data

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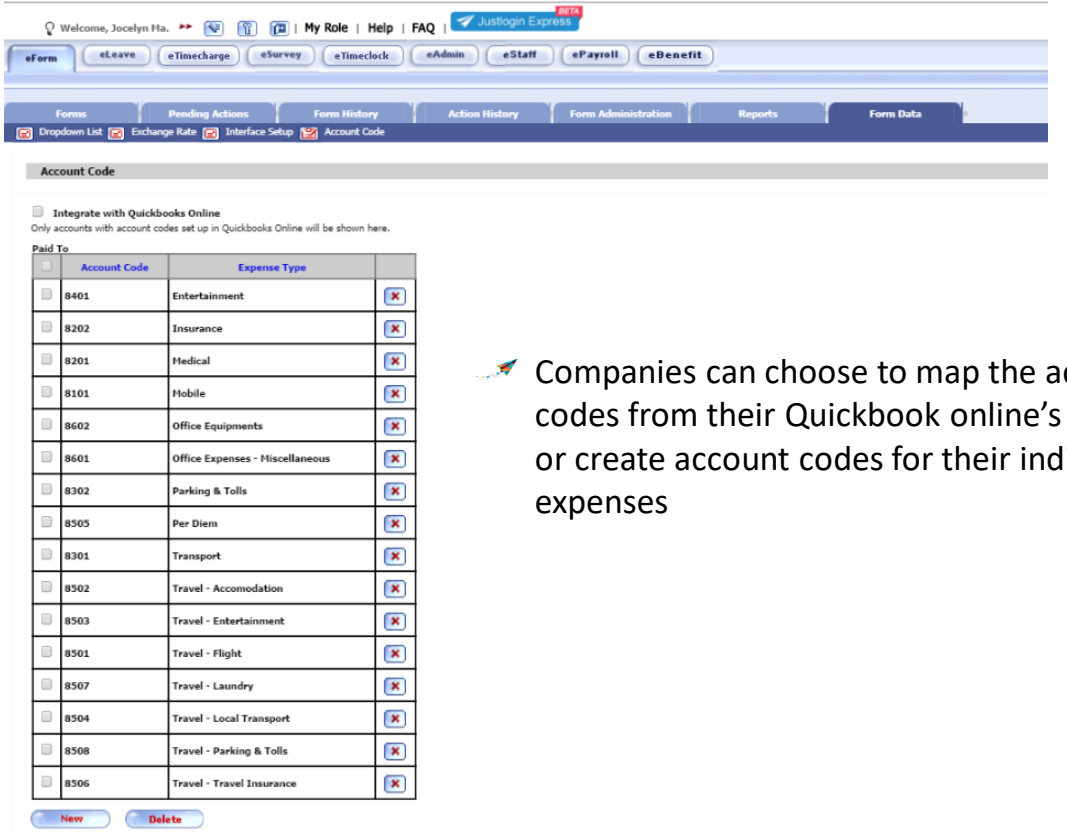
Create Expense Type



Account Code	Expense Type
8401	Entertainment
8202	Insurance
8201	Medical
8101	Mobile
8602	Office Equipments
8601	Office Expenses - Miscellaneous
8302	Parking & Tolls
8505	Per Diem
8301	Transport
8502	Travel - Accomodation
8503	Travel - Entertainment
8501	Travel - Flight
8507	Travel - Laundry
8504	Travel - Local Transport
8508	Travel - Parking & Tolls
8506	Travel - Travel Insurance

- Companies can choose to map the account codes from their Quickbook online's account or create account codes for their individual expenses

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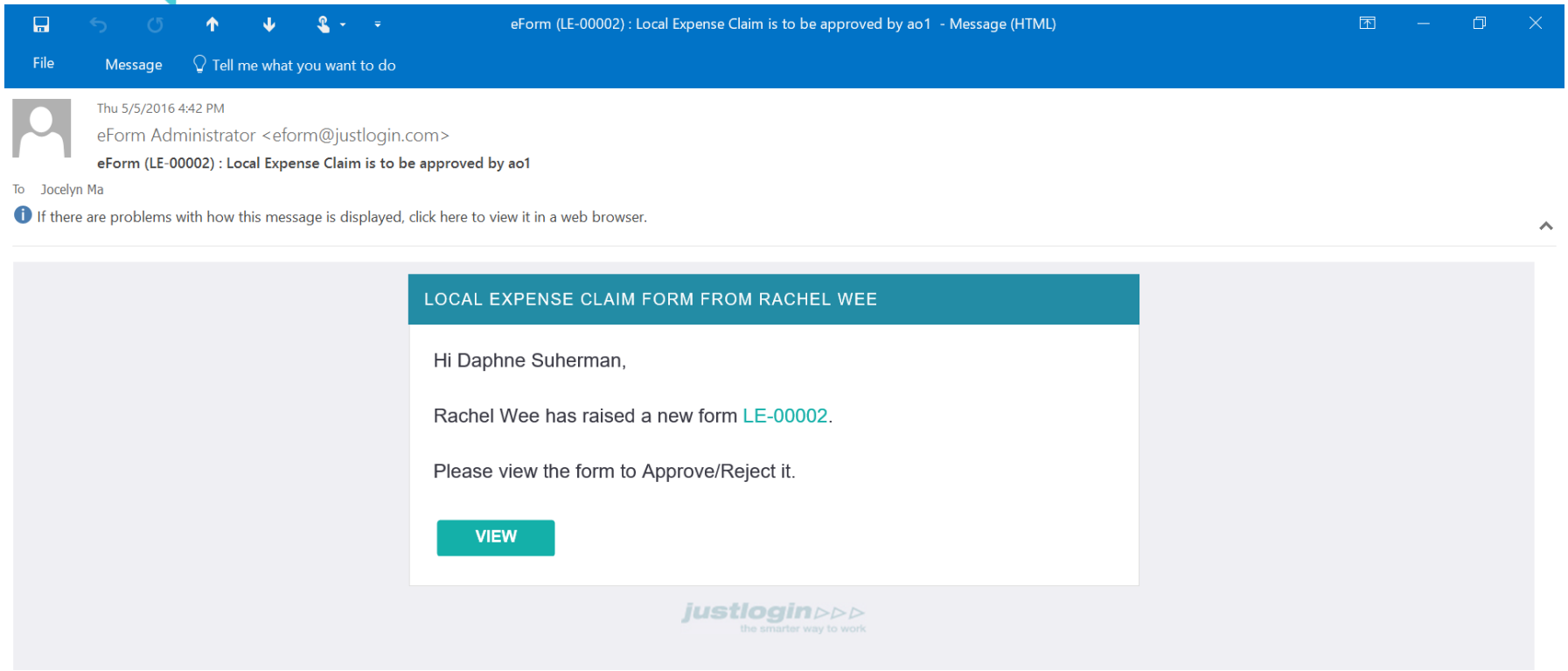
Forms Sample Emails Notification

Email to First or Second Tier of Approval



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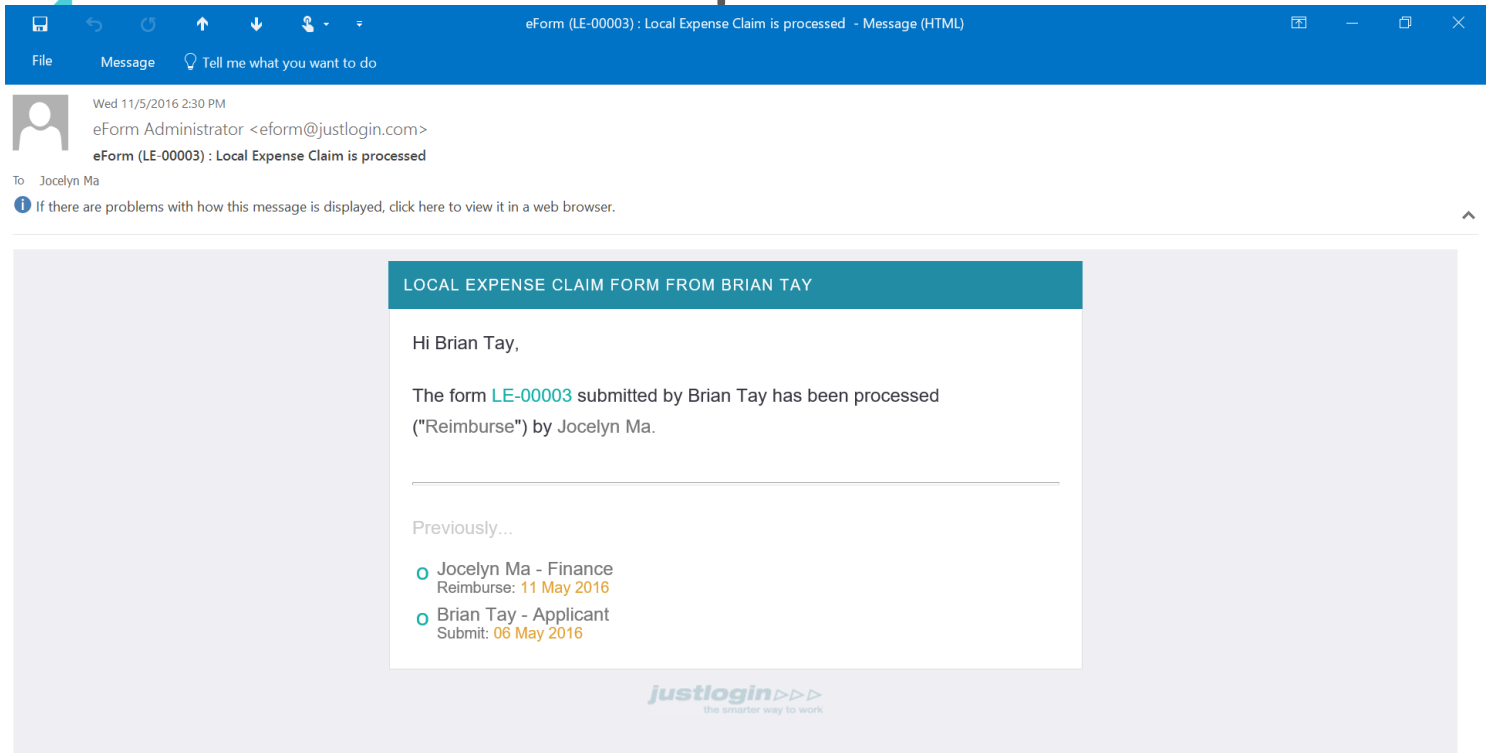
Email to Applicant once Claim is processed



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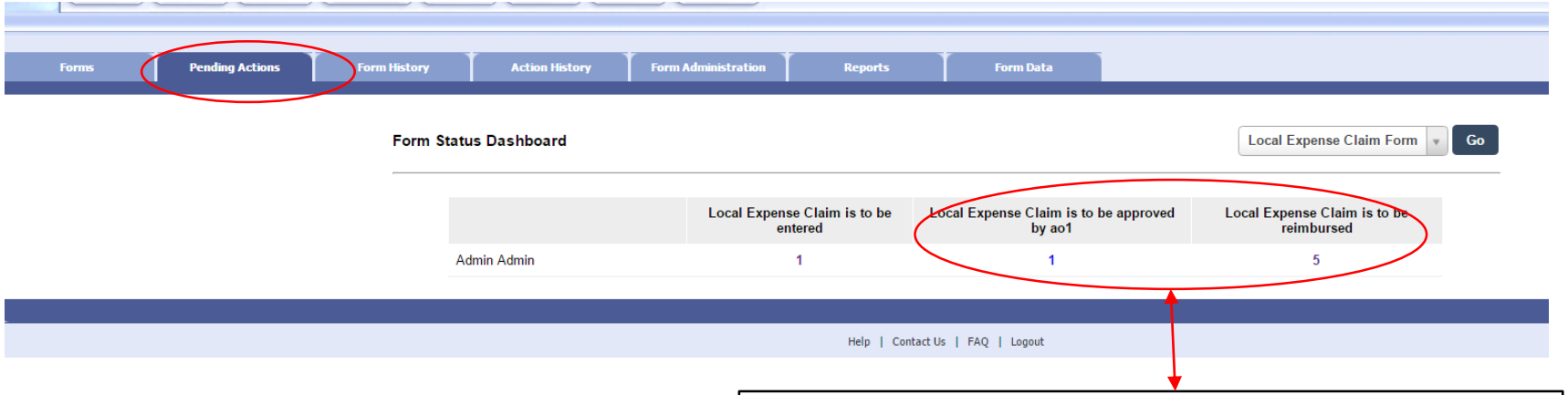
Forms Administrator

Pending Actions



- Claims administrator manage the claims approval by selecting the pending claims indicated as per above.

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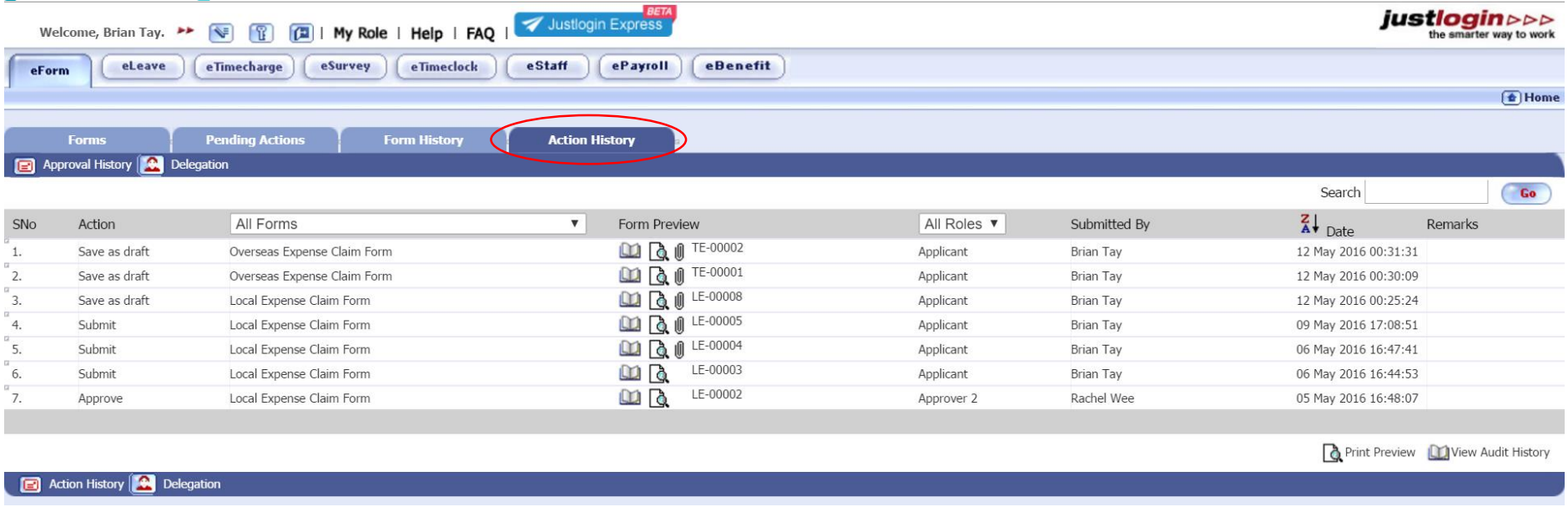
Action History



- All action history are captured (saved as draft, submitted and approval expense forms)

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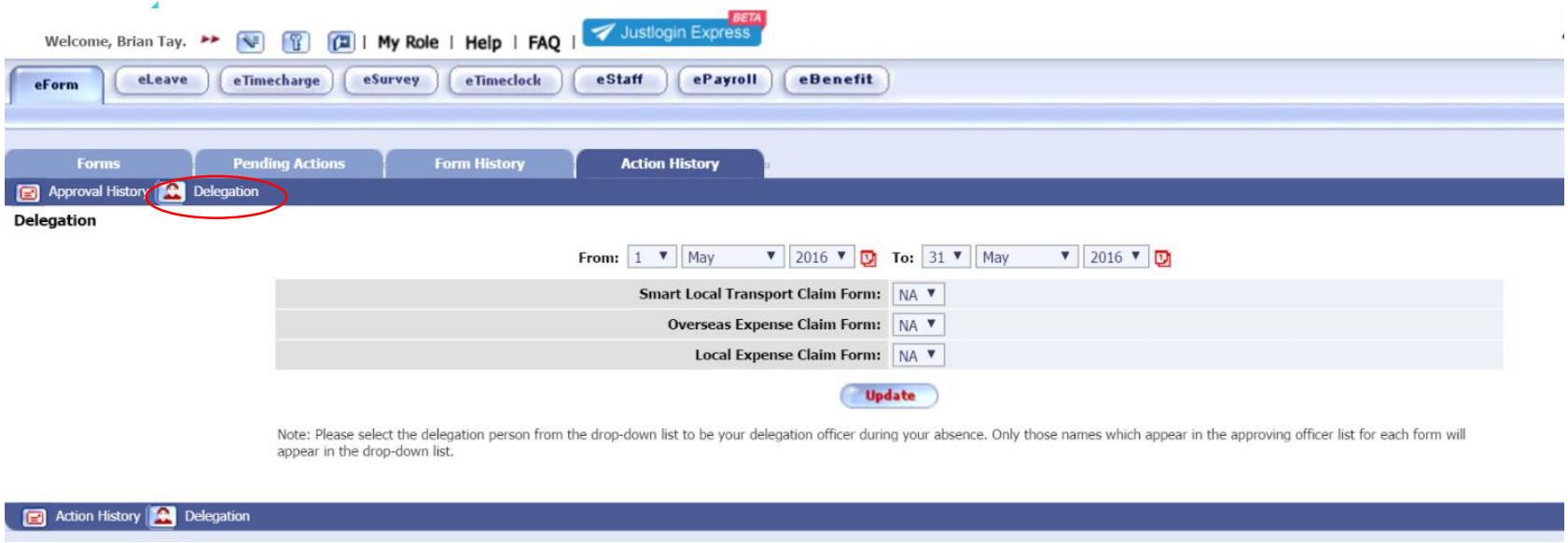
Delegation



- Approving Managers going on leave can delegate the approval admin

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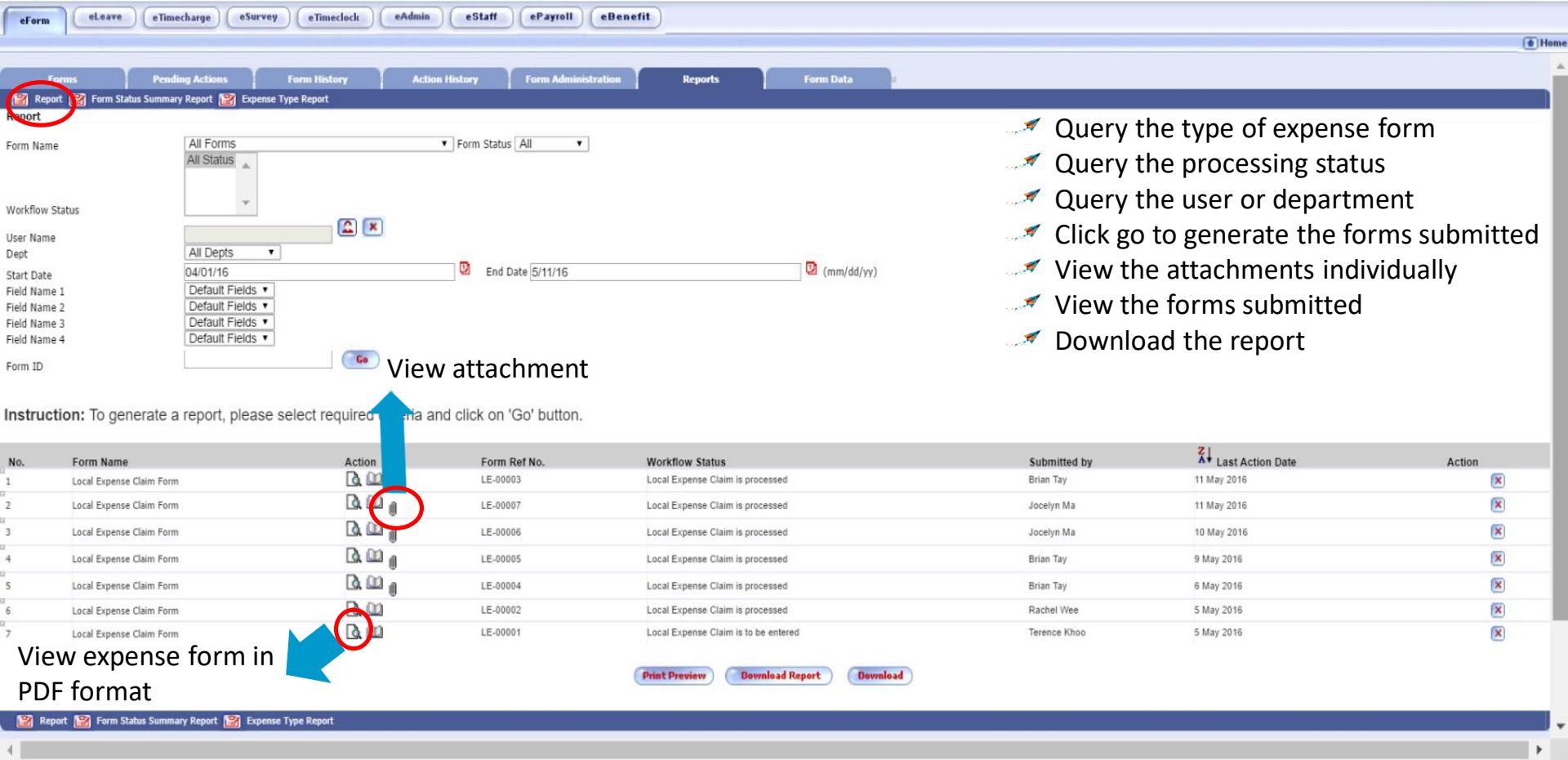
Reports

Reports



View attachment

View expense form in PDF format

- Query the type of expense form
- Query the processing status
- Query the user or department
- Click go to generate the forms submitted
- View the attachments individually
- View the forms submitted
- Download the report

Form Status Summary Report

- Select the expense form
- Click go to generate

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Form Status Summary Report

Welcome, Jocelyn Ma. | My Role | Help | FAQ | Justlogin Express BETA

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eForm | eLeave | eTimecharge | eSurvey | eTimeclock | eAdmin | eStaff | ePayroll | eBenefit

Home

Forms | Pending Actions | Form History | Action History | Form Administration | Reports | Form Data

Report | Form Status Summary Report | Expense Type Report

Form Status Summary Report

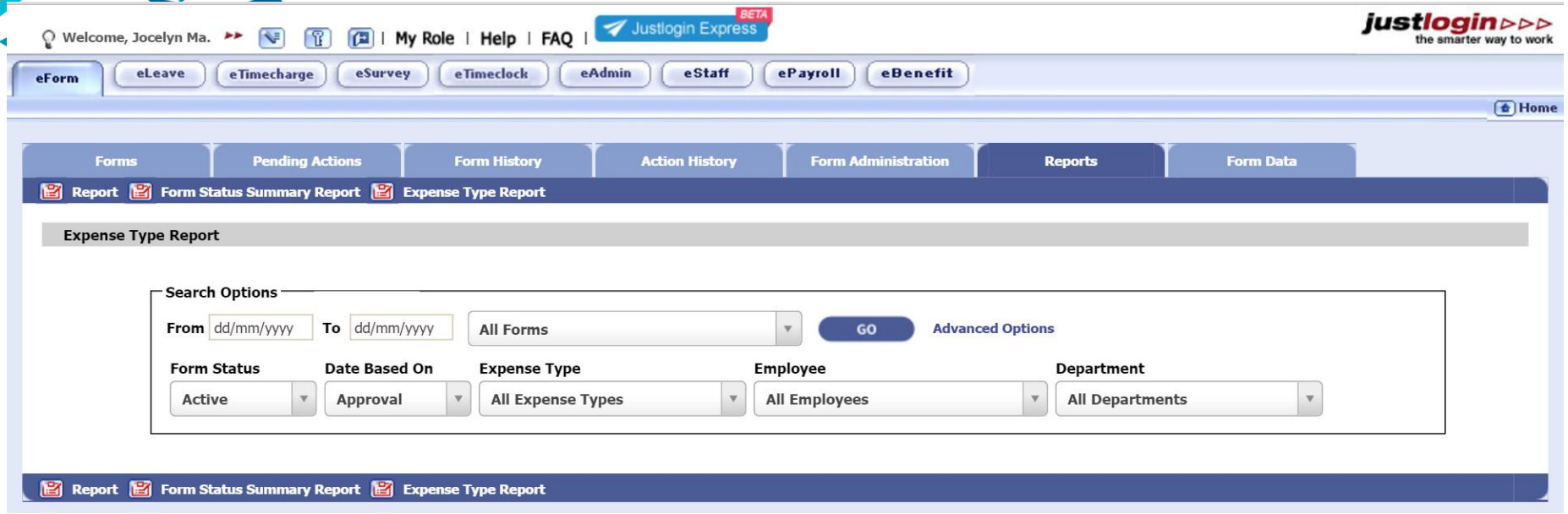
Form Name: Local Expense Claim Form Form Status: Active Go

S/N	Name	Local Expense Claim is to be entered	Local Expense Claim is to be approved by ao1	Local Expense Claim is to be approved by ao2	Local Expense Claim is to be reimbursed	Local Expense Claim is processed
1	AIELLEN GAMBOA CASTILLO	0	0	0	0	0
2	ANICETO ANGELICA LIQUIGAN	0	0	0	0	0
3	AUBREY CHIEW	0	0	0	0	0
4	Brian Tay	1	0	0	0	0
5	CANDY ONG WAN RONG	0	0	0	0	0
6	CANTOS RITCHAN PIDLAOAN	0	0	0	0	0
7	CANTOS RITCHAN PIDLAOAN	0	0	0	0	0
8	Daphne Suherman	0	0	0	0	0
9	DAYNA ONG SHU MIN	0	0	0	0	0
10	DOMINIC SOH JUEN AHN	0	0	0	0	0
11	FAUZIAH BINTE MUSA	0	0	0	0	0
12	FOONG KING YI	0	0	0	0	0
13	GOH WEI WEN	0	0	0	0	0
14	Grace Goh	0	0	0	0	0
15	HEE LING YI	0	0	0	0	0
16	HERBER ALAIN GUY	0	0	0	0	0
17	JEAN NG	0	0	0	0	0
18	Jocelyn Ma	0	0	0	0	6
19	JONATHAN LIM ZHI XUAN	0	0	0	0	0
20	JUSTIN WOO YONG CONG	0	0	0	0	0

1 2 3 4

Print Preview Download

Expense Type Report



- Query the date range
- Query the expense form
- Query the status
- Query the employee or department
- Click go to generate the report

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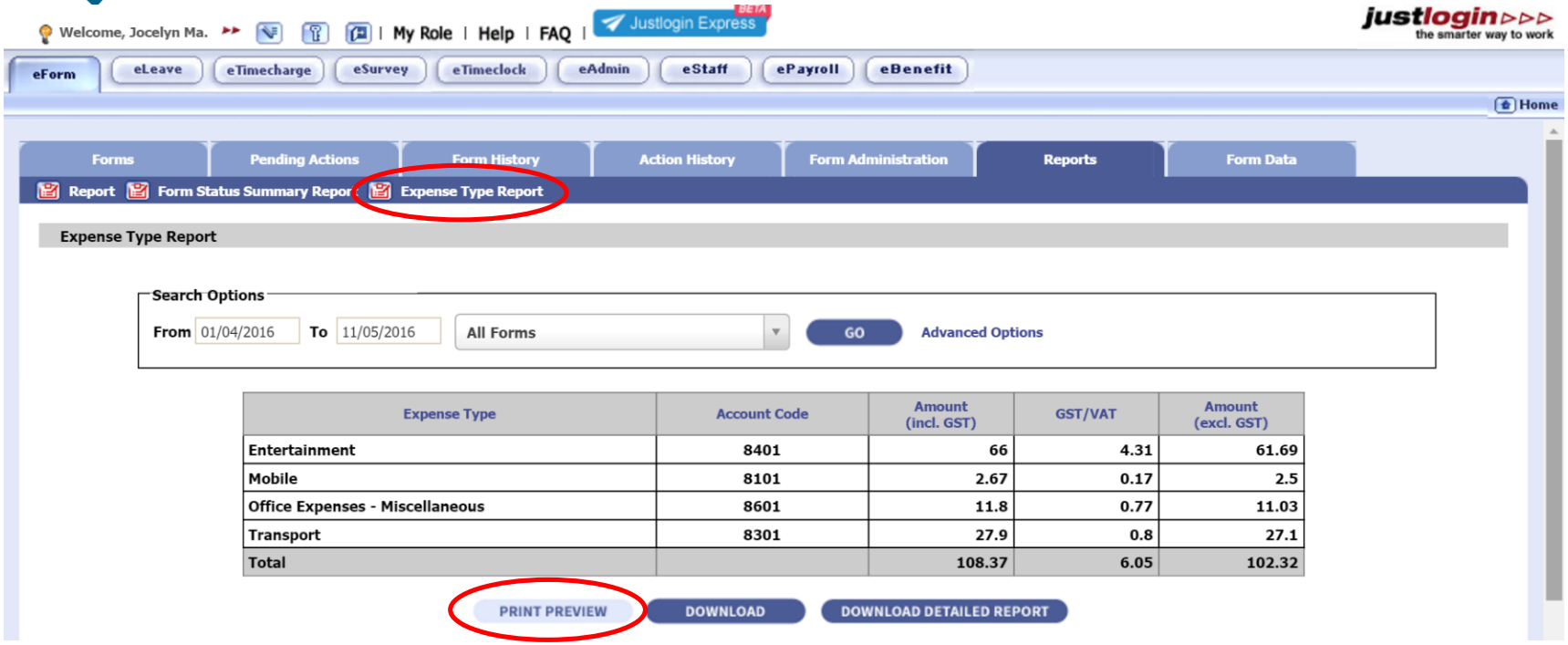
Expense Type Report



Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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Sample Expense Type Report (Print Preview)

Welcome to JustLogin | Expense Type Report

https://www.justlogin.com/eform1/ExpenseTypeReportPrint.aspx?RDID=587706B5-6902-44FA-8042-CA0AE8C6C238

Apps | Demo | Salesforce | Justlogin | Login | Yammer | Trello | Singapore Startups - | Evaluation Plan | PDFProtect! - Add pa | PIC | StarHub ePayroll Pro

Expense Type	Account Code	Amount (excl. GST)	GST/VAT	Amount (incl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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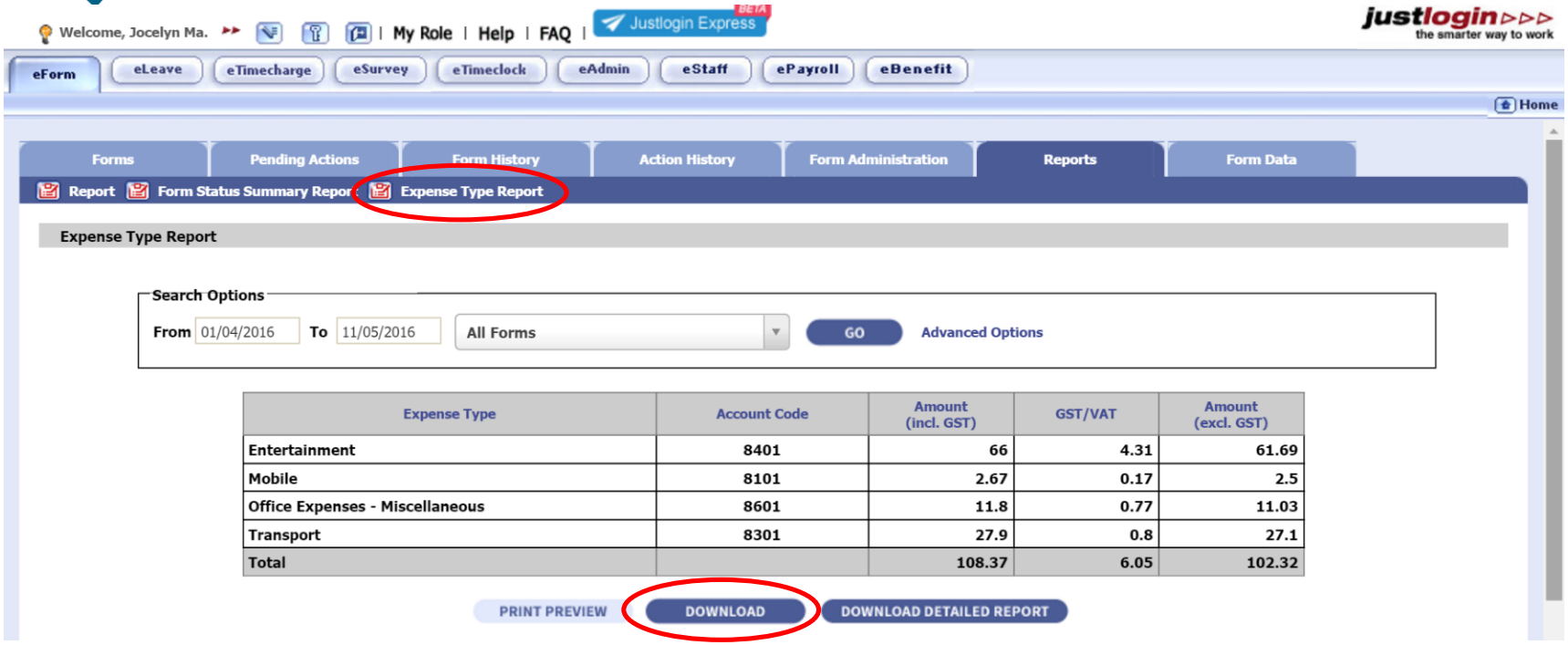
Expense Type Report



Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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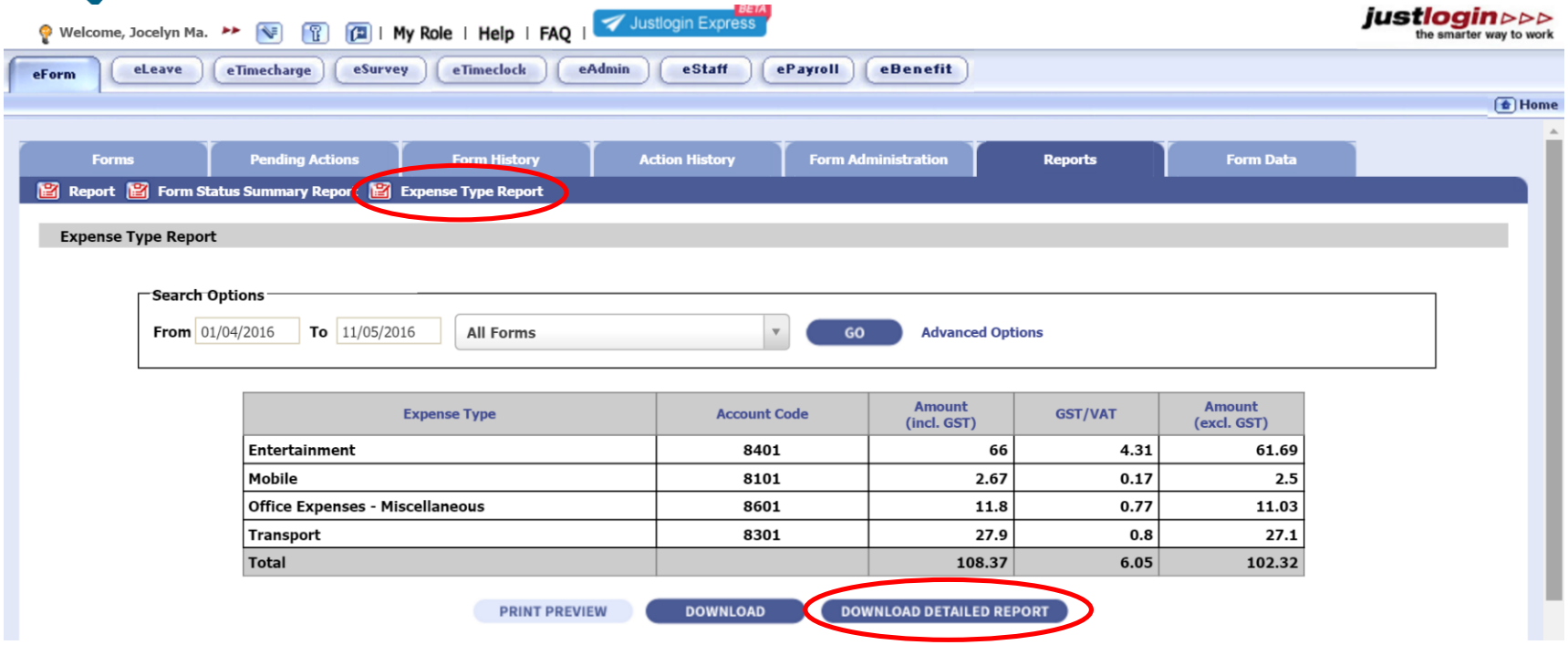
Sample Expense Type Report (Summary)

ExpenseTypeReport (5) - Excel

	A	B	C	D	E
1	Expense Type	Account Code	Amount (excl. GST	GST/VAT	Amount (incl. GST)
2	Entertainment	8401	66	4.31	61.69
3	Mobile	8101	2.67	0.17	2.5
4	Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
5	Transport	8301	27.9	0.8	27.1
6	Total		108.37	6.05	102.32

Expense Type Report



Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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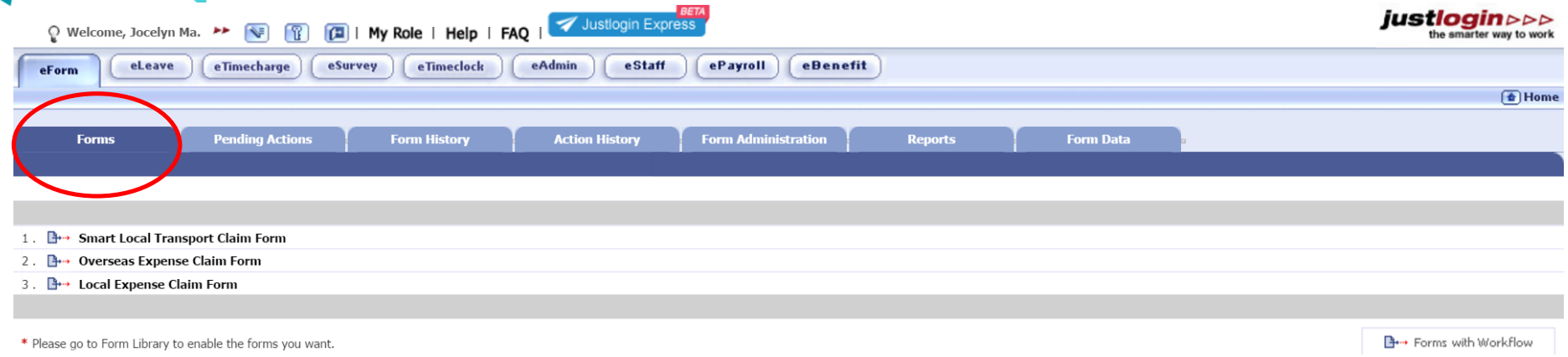
Sample Expense Type Report (Detailed)

Expense Type	Account C	Employee Name	Amount (excl. GST)	GST/VAT	Amount (incl. GST)
Entertainment	8401	Brian Tay	23.4	1.53	21.87
Entertainment	8401	Jocelyn Ma	42.6	2.78	39.82
Mobile	8101	Brian Tay	2.67	0.17	2.5
Office Expenses -	8601	Rachel Wee	11.8	0.77	11.03
Transport	8301	Brian Tay	12.3	0.8	11.5
Transport	8301	Rachel Wee	15.6	0	15.6
Total			108.37	6.05	102.32

Copyr

Forms Usage (User Perspective)

Employees' Functions



- Applicants have to first select the forms / claims that they are doing.

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Types of Forms Available

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Smart Local Transport Claim Form

Welcome, Brian Tay. | My Role | Help | FAQ | Justlogin Express BETA

eForm | eLeave | eTimecharge | eSurvey | eTimeclock | eStaff | ePayroll | eBenefit

Forms | Pending Actions | Form History | Action History

Save As Draft | Submit | Go Back

Smart Local Transport Claim Form

Name BRIAN TAY

Employee No.
Claim Date 11/5/2016
Vehicle No.
Claim Month May

Date (dd/mm)	From	To	Km.	Purpose	Transport Type	Car Park	ERP	Taxi	Bus/MRT	Amount
29/04	20 Kallang Avenue Singapore	120 Robinson Road Singapore	5.99					8.10		8.10
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								

- Complete the necessary fields base on your transport claim
- System is able to compute the distance base on google map
- Attached your receipt at the end of the line item

- Click to attach your receipt

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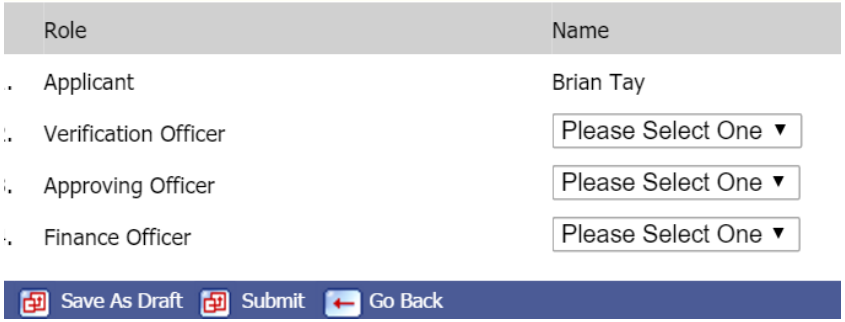
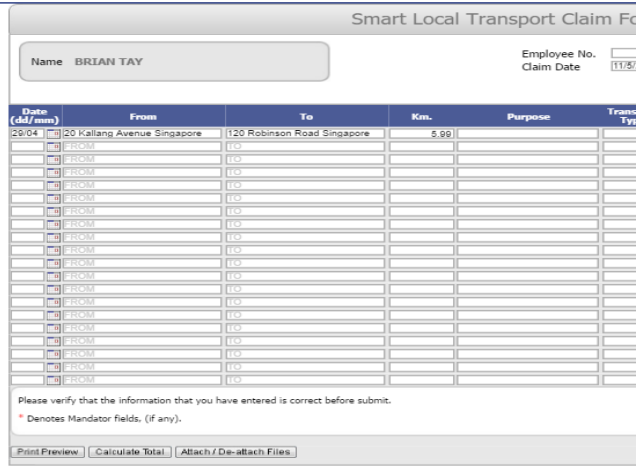
Smart Local Transport Claim Form





- Select the approvals for your claim (one-time setup)
- Click re-calculate total before saving as draft or submission
- Click save as draft to return back to the form
- Click submit for approval

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Types of Forms Available

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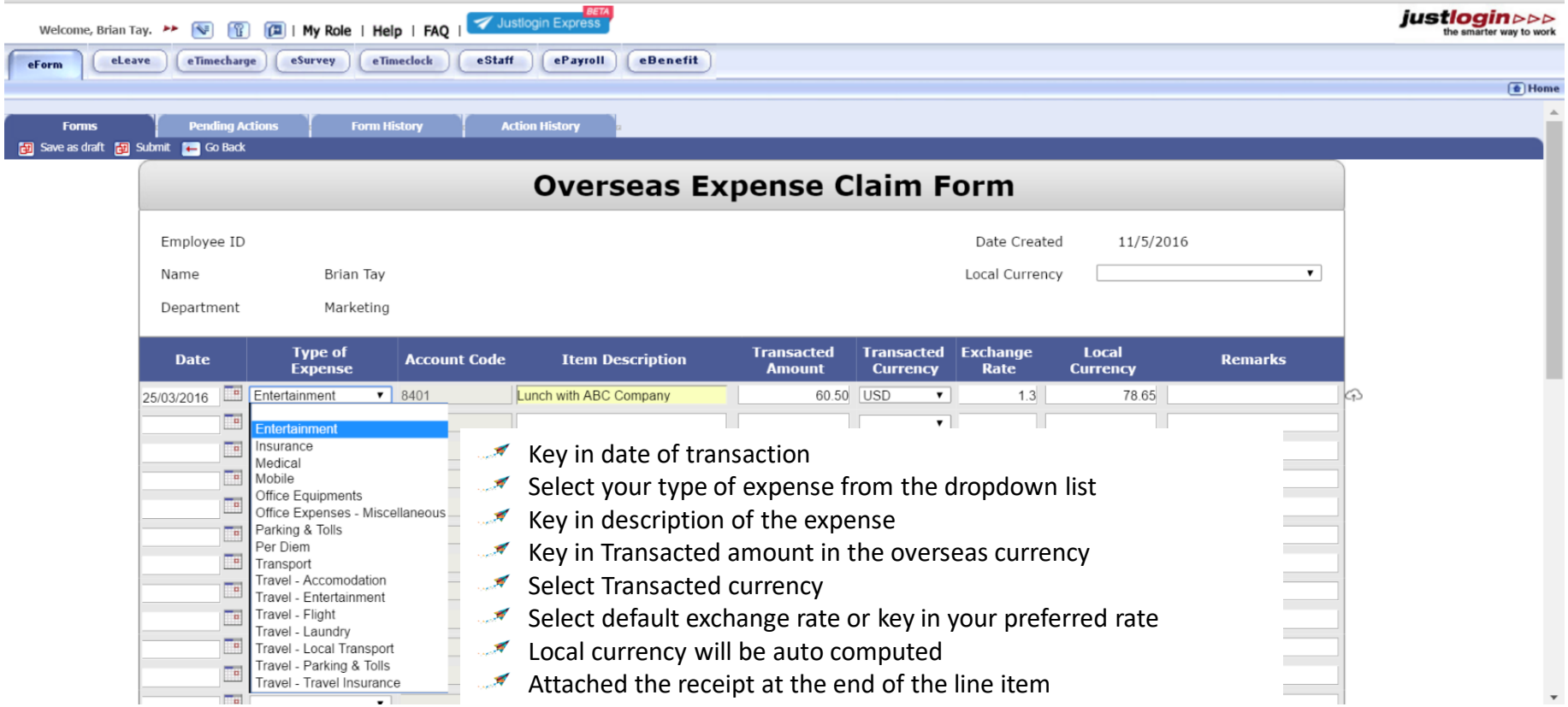
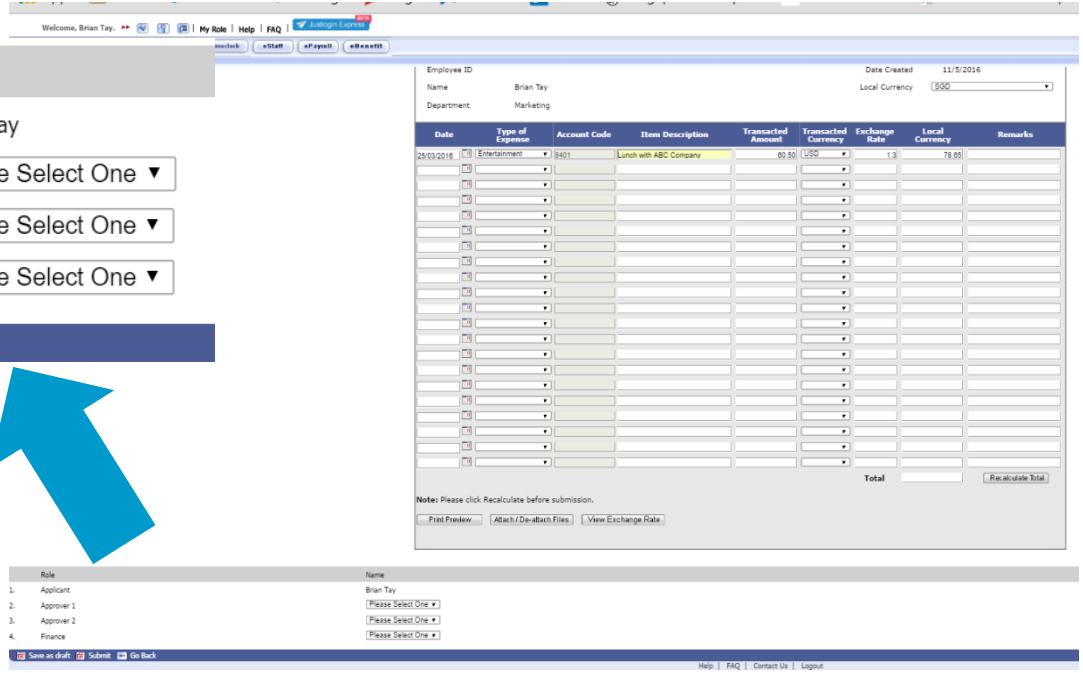
Overseas Expense Claim Form



- Key in date of transaction
- Select your type of expense from the dropdown list
- Key in description of the expense
- Key in Transacted amount in the overseas currency
- Select Transacted currency
- Select default exchange rate or key in your preferred rate
- Local currency will be auto computed
- Attached the receipt at the end of the line item

Overseas Expense Claim Form



- Select the approvals for your claim (one-time setup)
- Click re-calculate total before saving as draft or submission
- Click save as draft to return back to the form
- Click submit for approval

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Types of Forms Available

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Local Expense Claim Form

eForm | eLeave | eTimecharge | eSurvey | eTimeclock | eStaff | ePayroll | eBenefit

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Local Expense Claim Form

Employee ID

Date Created 12/5/2016

Name Brian Tay

Department Marketing

Date	Type of Expense	Account Code	Item Description	GST	Total Amount	Before GST	GST Amt	Remarks
02/02/2016	Mobile	8101	Overseas Phone Call with ABC	YES	6.70	6.26	0.44	

- Key in date of transaction
- Select Type of Expense from dropdown list
- Account Code would be auto computed
- Key in Item Description
- Select if tax is applicable
- Total Amount transacted
- SG would have GST auto computed
- Attach your receipt at the end of the line item

Local Expense Claim Form

Role	Name
Applicant	Brian Tay
Verification Officer	Please Select One ▼
Approving Officer	Please Select One ▼
Finance Officer	Please Select One ▼

Save As Draft | Submit | Go Back

- Select the approvals for your claim (one-time setup)
- Click re-calculate total before saving as draft or submission
- Click save as draft to return back to the form
- Click submit for approval

FAQ | Justlogin Express BETA

eStaff | ePayroll | eBenefit

Employee ID | Date Created 12/5/2016

Name Brian Tay | Department Marketing

Date	Type of Expense	Account Code	Item Description	GST	Total Amount	Before GST	GST Amt	Remarks
02/02/2016	Mobile	8101	Overseas Phone Call with ABC	YES	6.70	6.26	0.44	
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
				NO				
			Total					Recalculate Total

Note: Please click Recalculate before submission.

Print Preview | Attach / De-attach Files

	Role	Name
1.	Applicant	Brian Tay
2.	Approver 1	None
3.	Approver 2	None
4.	Finance	Jocelyn Ma

Save as draft | Submit | Go Back

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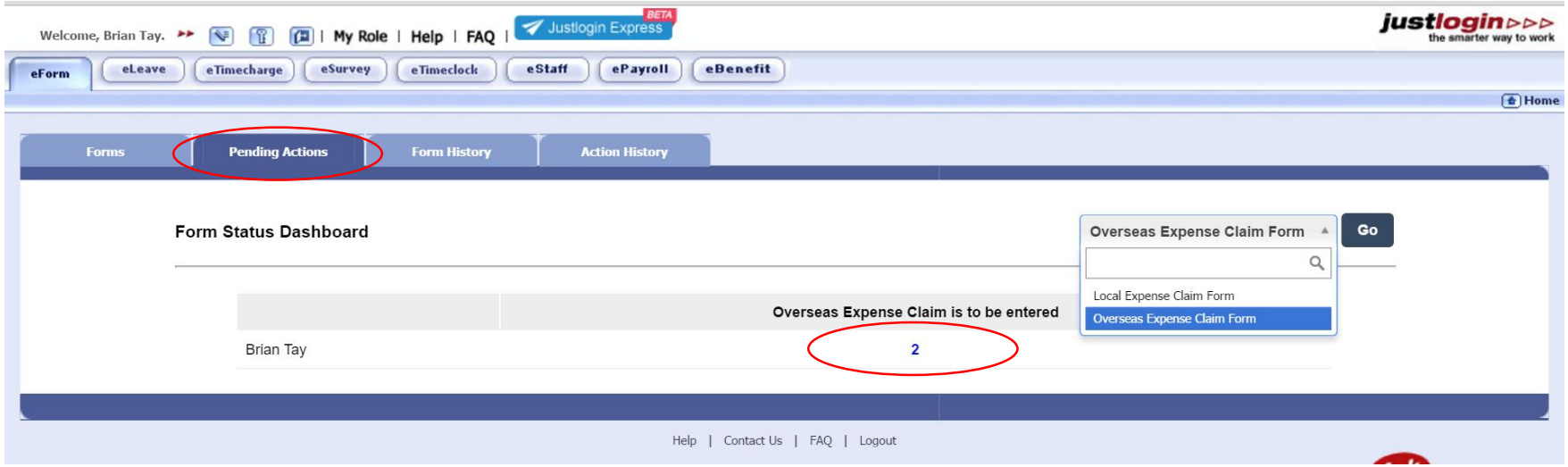
Pending Actions



- Select the type of expense form you had saved as draft from the top right hand corner
- Click on the number to select the form you had saved previously

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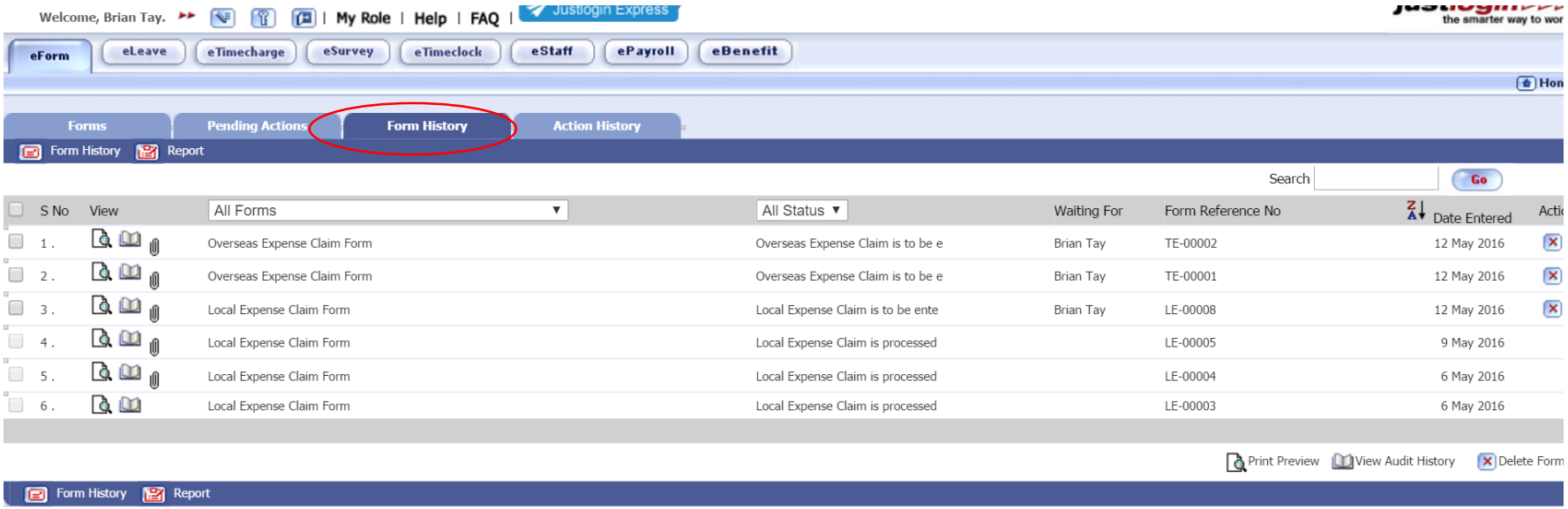
Form History



- View the PDF format of the expenses forms
- View the attachments from the expense forms
- View the status of the expense form

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Print Format of Expense Form

file:///C:/Users/Jocelyn/Downloads/AB911B4CECF34EAF8C76AFAA7DEF80DB.pdf

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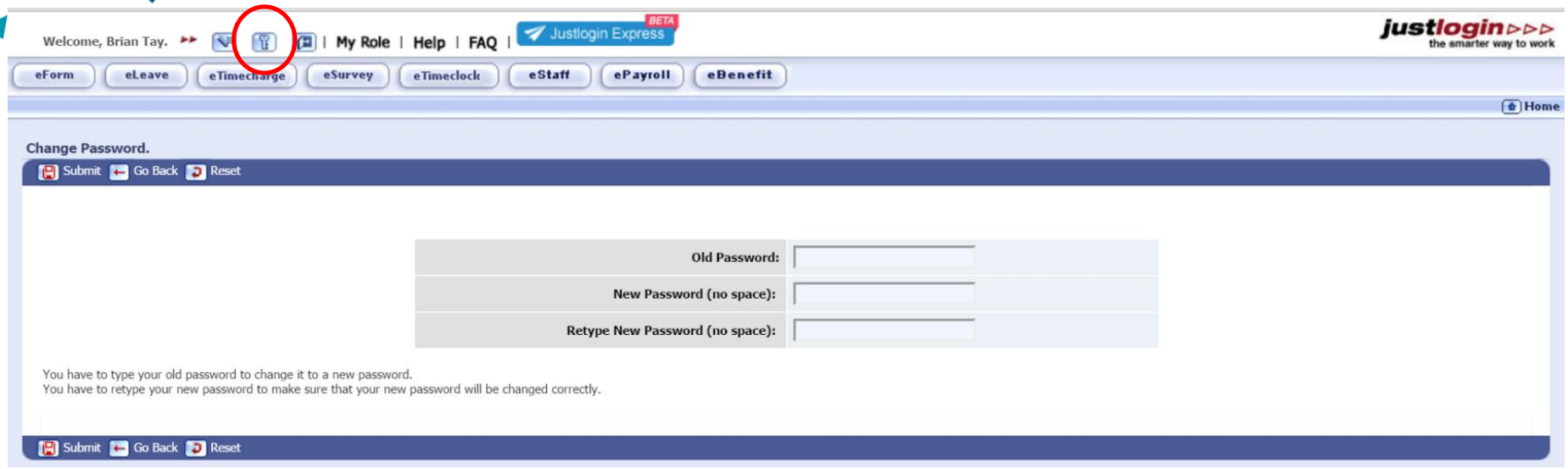
Overseas Expense Claim Form
(Ref No :TE-00002)

Employee ID			
Name	Brian Tay		
Department	Marketing	**Date Created**	12/5/2016
	Local Currency		

Date	Type of Expense	Account Code	Item Description	Transacted Amount	Transacted Currency	Exchange Rate	Local Currency	Remarks
11/3/2016	Office Equipments	8602	Wireless Mouse	26.90	USD	1.30	34.97	

- Save the respective expense form
- Print the respective expense form

Change Password



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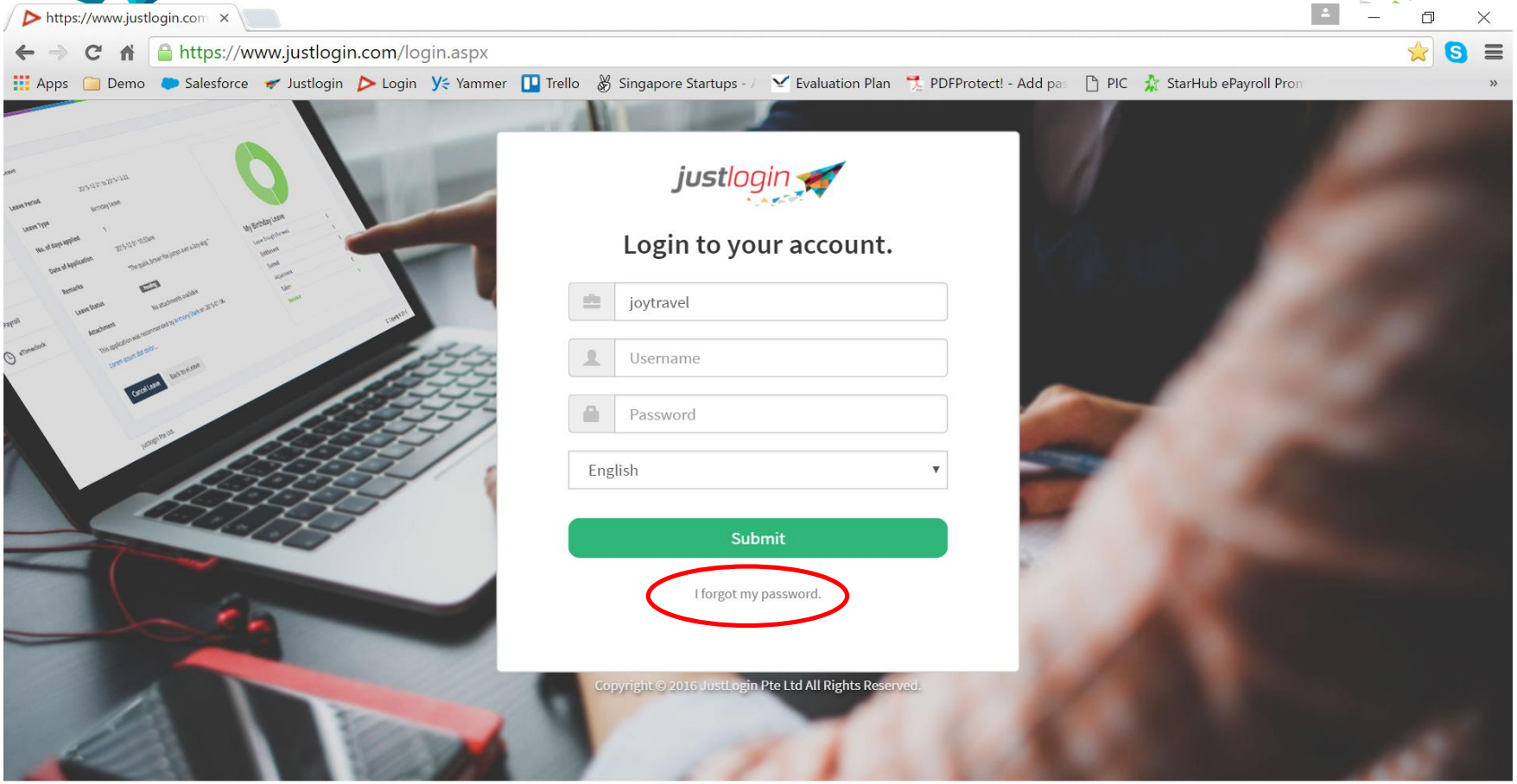
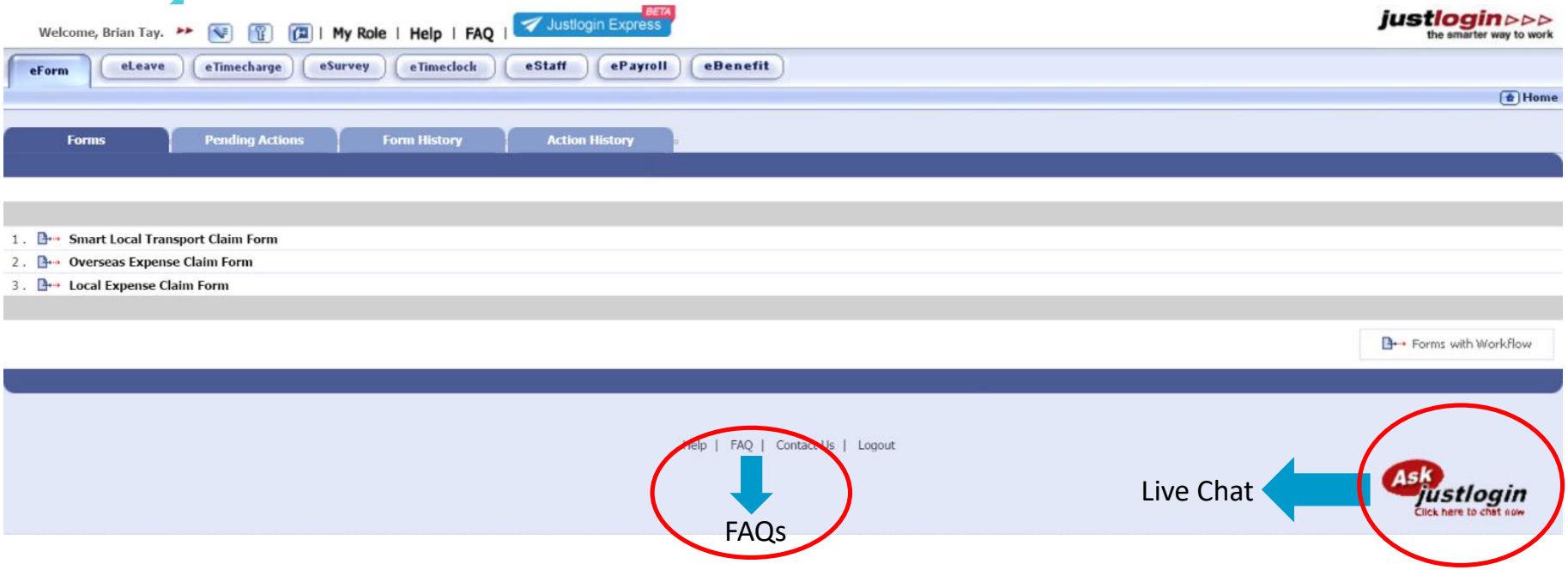
Forget Password



Support



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