# Hours at Work

## HR Analyst Manual

**Payroll readiness, compliance, and the weekly close**

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## Introduction

You run payroll. Every cycle, the same question hits your desk: who hasn't submitted, who hasn't been approved, who logged over 40, and is anything missing before I push the file to the payroll vendor. This manual walks you through the eight reports that answer that question — and the order to run them in so you close clean every time.

This manual assumes your base role is Staff, Approver, or Admin, and that an Admin has granted you the **HR Analyst** Access add-on. Without that Access, the reports below are hidden and you'll see only the workspace's Charge-code Effort and Staff Effort reports.

## What's new since v2.99.4

Two changes shipped between v2.99.4 and v2.100.0 that affect the numbers on your screen. They're both correctness improvements — nothing you need to work around, but worth understanding before you compare reports across the upgrade.

### The straddle-week fix

If your workspace anchors weeks on Sunday but runs Monday-start pay periods, older versions of Hours at Work sometimes silently dropped timesheets whose seven-day span crossed a pay period boundary. A week running Sun Jun 21 through Sat Jun 27, for example, would straddle a Mon-start pay period that began Mon Jun 22. The old logic couldn't decide which period owned those hours and dropped them from Payroll Readiness, HR Export, Unfinished, Pending Approvals, Late Submissions, and Weekly Reconciliation.

Since v2.99.5, all six of those surfaces correctly credit the hours to the containing period. If you compared reports side-by-side across the upgrade, expect one-time reconciliation differences. Steady-state numbers should match cleanly from here on.

### Drill-down modals on Late Submissions, 40h Threshold, and Weekly Reconciliation

Three reports now open a **drill-down modal** when you click Details on a row. In earlier versions the Details button either did nothing (the row payload was missing the timesheet id) or errored with "You are not the assigned approver." Now it opens a read-only per-timesheet view for HR Analysts regardless of who signed the timesheet, with a **View signed PDF** link when the timesheet is APPROVED or LOCKED.

The drill-down empty state is also polished. If you drill into a row whose staff member hasn't logged anything yet, the panel reads "No hours entered yet for this week" instead of showing an empty pane. No confusion about whether the click did anything.

## A note on dates

Every date you see on screen now renders in medium format — Jun 28, 2026 for a single date, Jun 22 – Jun 28 for a week range, Jun 28, 2026 · 9:03 AM for a timestamp. That's true across the Reports tab, the Payroll Readiness header, the Weekly Reconciliation table, and the HR Export preview.

CSV downloads and signed PDF exports keep ISO YYYY-MM-DD. That's deliberate. Payroll parsers, funder reconciliation workbooks, and audit tooling all expect the ISO shape and would break if the export switched to prose. So the on-screen table shows "Jun 28, 2026" and the CSV row for the same day reads "2026-06-28". Both represent the same date; the format matches the audience.

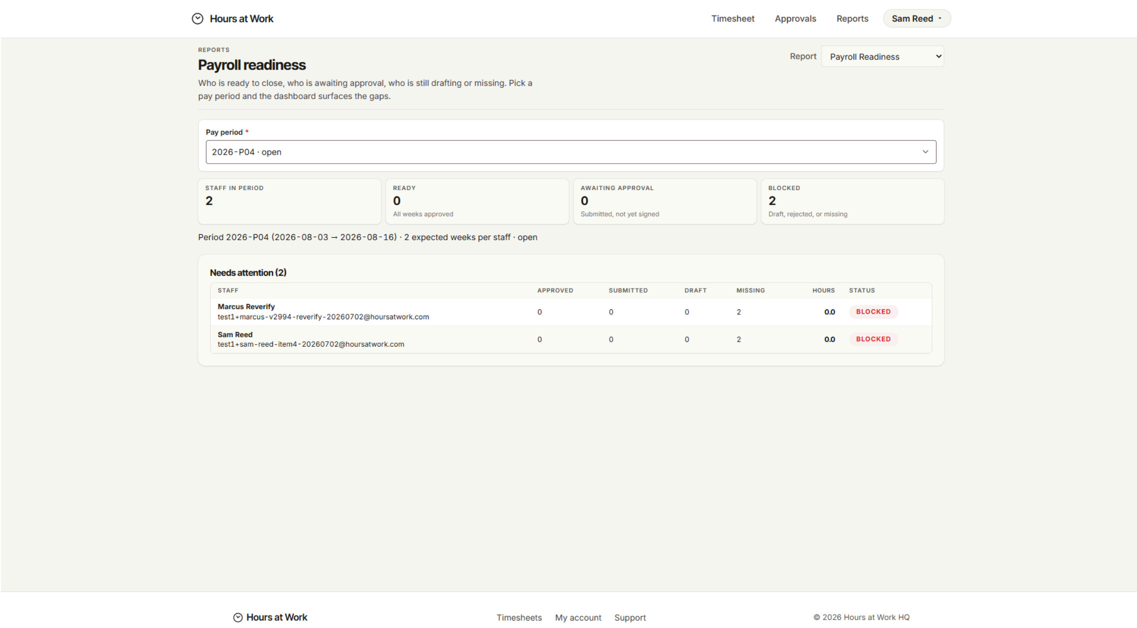
Anywhere in this manual you see a date example, assume the on-screen surface is medium and the file surface is ISO. If a screenshot in your product looks different from a screenshot in this manual, it's the date format that changed, not the report.

## Getting started

Your Admin grants you HR Analyst Access on your User profile. That Access unlocks Payroll Readiness, Unfinished, Pending Approvals, Late Submissions, 40h Threshold, Weekly Reconciliation, Compliance Gaps, and HR Export.

Once your Access is live:

1. Sign in at `your-org.hoursatwork.com` .
2. Click **Reports** in the top navigation.
3. Open the **Report** dropdown. You'll see two groups — **Reports** and **Utilities**.
4. Pick **Payroll Readiness** first. Bookmark the URL.




**Why this matters.** Every other report answers a question that Payroll Readiness raised. Start there.

### First sign-in for bulk-imported analysts

If your Admin bulk-imported you rather than sending a single invite, you received an email with a temporary password. Sign in with that password and you'll land on the reset page ( `/staff/timesheets/account/reset-password/` ) to set a permanent one. Temporary passwords expire seven days after issue — if yours has, ask your Admin to re-issue.

You don't need any special action beyond setting the password. Your HR Analyst Access carries across from the import, so once you're through the reset page, Reports → Payroll Readiness works as normal.

## Daily workflow

You won't open all eight reports every day. Between pay periods the rhythm is light — a quick check that nothing is sliding. The heavy lift happens on close day. Here's the daily pattern.

### Open Payroll Readiness and pick the current pay period

Reports → Payroll Readiness. The **Pay period** dropdown lists every period with `open` or `closed` tags. Pick the most recent `open` one.

You'll see four summary tiles: **Staff in period**, **Ready**, **Awaiting approval**, **Blocked**. Below that, a **Needs attention** table lists every staff member who isn't ready yet, with per-week counts in APPROVED / SUBMITTED / DRAFT / MISSING columns plus a STATUS badge.

The STATUS badge:

- **AWAITING** — submitted, but the approver hasn't signed. Nudge the approver.
- **BLOCKED** — nothing usable on file. Nudge the staff member.

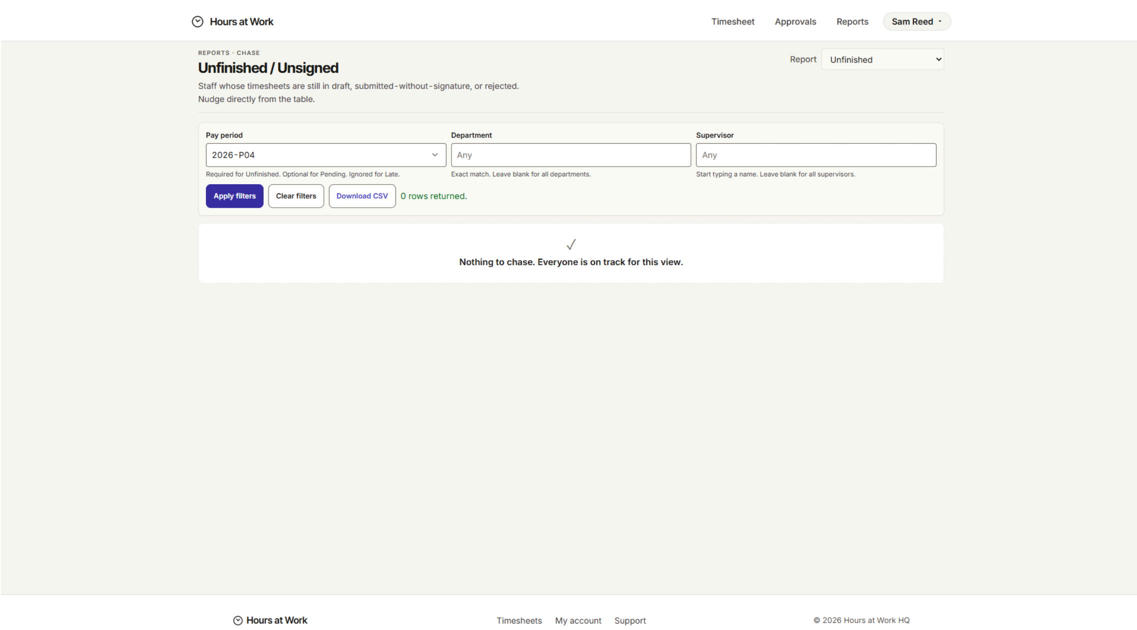
### Triage by status

Walk the table top to bottom:

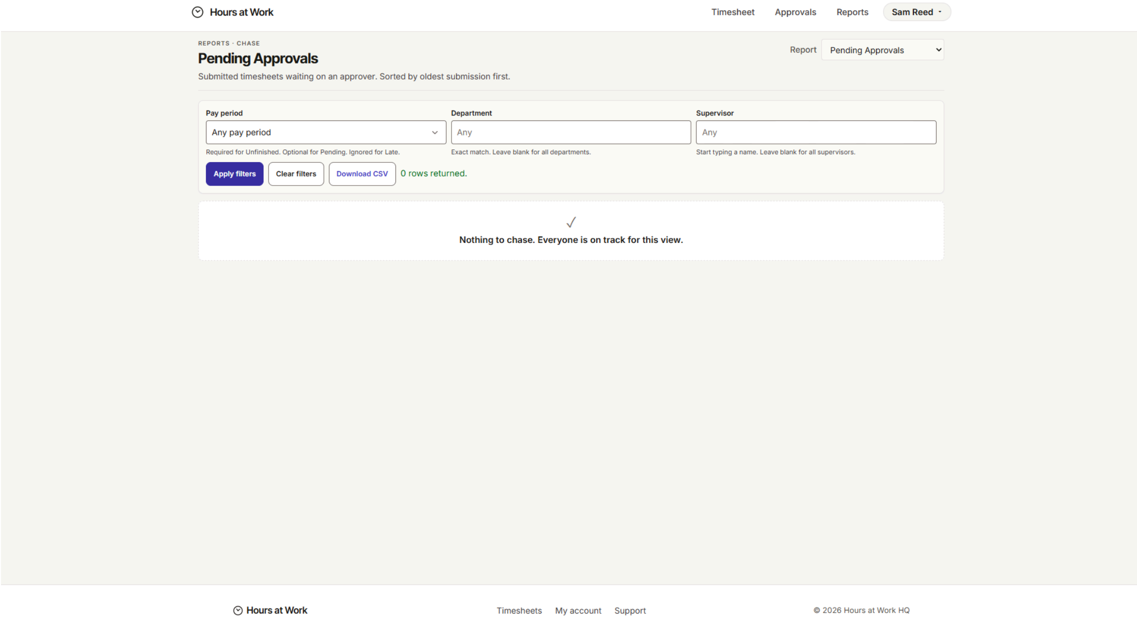
- **BLOCKED** with hours in DRAFT — message the staff member with the period end date.
- **BLOCKED** with MISSING > 0 and zero hours — higher risk; chase first.
- **AWAITING** — find their Approver and ask them to clear the queue.

### Spot-check Unfinished and Pending Approvals

Reports → **Unfinished**. Same staff as BLOCKED but in a copy-paste-friendly format.




Reports → **Pending Approvals**. Submitted timesheets sitting in an approver's queue, with the approver's name on each row.




## Recognizing fallback-queue rows

If a Pending Approvals row shows **fallback queue** in the approver column rather than a person's name, the staff member had no active Approver assignment at submission time. Since v2.89.0, the timesheet routes to the workspace's **fallback queue** instead of blocking the staff member. An Admin (or an HR Analyst or Fiscal Analyst, depending on how the workspace configured Orphan timesheet routing) signs the timesheet.

Fallback-queue rows are still your problem in the sense that they signal a broken Approver assignment upstream. The timesheet itself gets signed either way, so the staff member's pay isn't affected. But the missing assignment shows up in Compliance Gaps as a **No approver** row, and funder audits expect a proper mapping on record. Follow up with your Admin.

# Periodic tasks (close day)

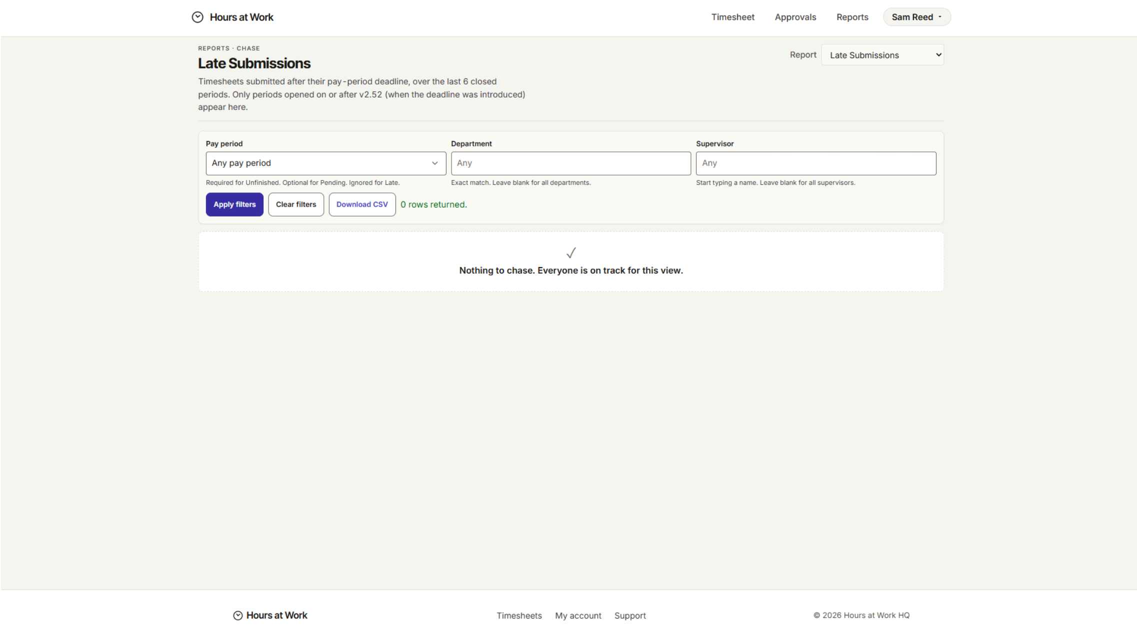
## Payroll Readiness, one more time

The goal now is an empty **Needs attention** table. Ready tile equals Staff in period. Until they match, you're not ready to export.

If you can't get there — someone on leave, a contractor finished mid-period, someone refuses to submit — work with your Admin. Some of those cases need a Period locking decision; others just need a manual nudge.

## Late Submissions

Reports → **Late Submissions**. Ignores the Pay period filter; looks at the last six closed periods. This report is your evidence for late-submission patterns.




Click **Details** on any row to open the drill-down modal. You'll see the staff-week's full breakdown — by-day totals, by-charge-code totals, submitted-at and approved-at timestamps, and a **View signed PDF** link when the timesheet is APPROVED or LOCKED.

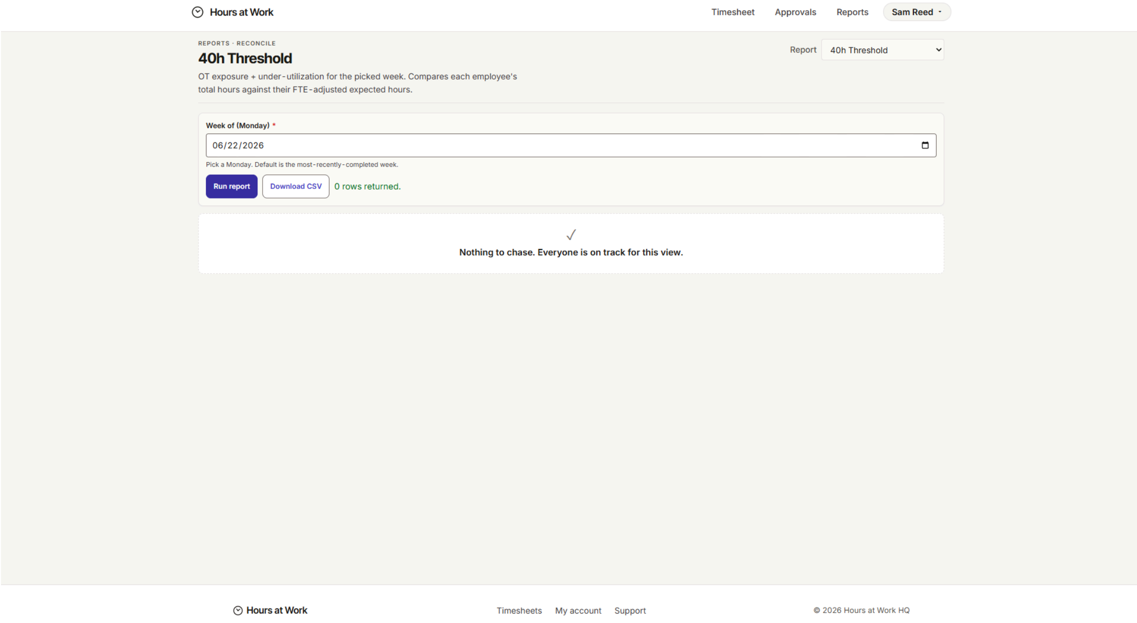
A pattern across periods is a coaching conversation — or a sign your Submission deadline is too aggressive.

## 40h Threshold

Reports → **40h Threshold**. Pick a **Week of (Monday)** — runs on a single seven-day window. For biweekly closes, run it twice.

Buckets:

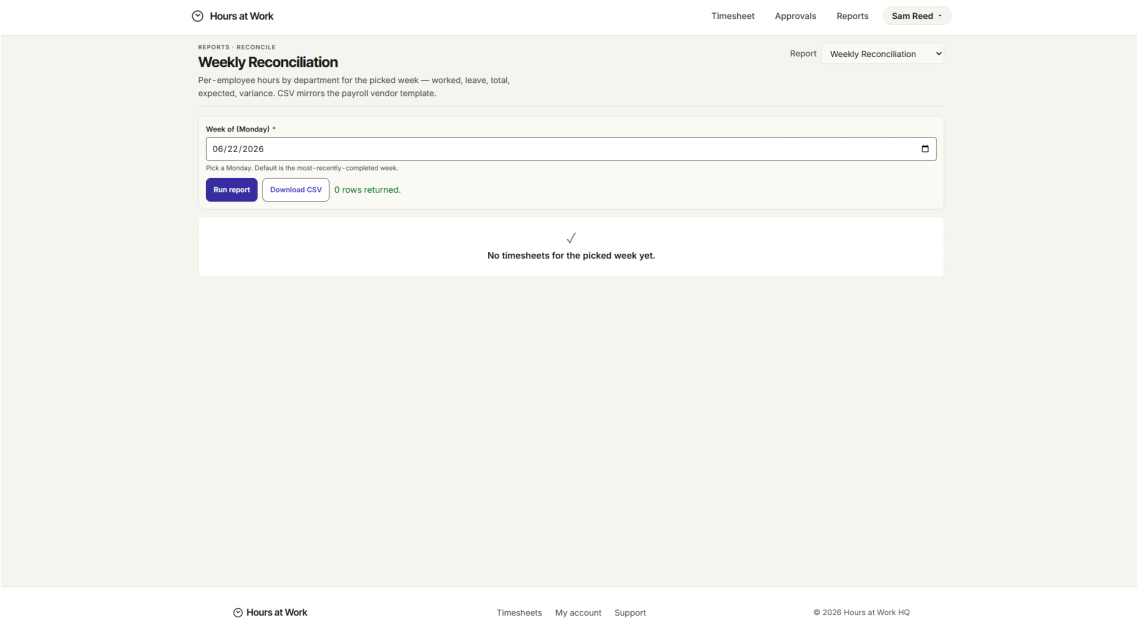
- **OT** — actual exceeded FTE-adjusted expected.
- **ON TRACK** — within tolerance of FTE × 40.
- **UNDER** — actual fell short.




Row-level **Details** opens the drill-down modal with the per-day breakdown — the fastest way to tell whether an UNDER row is a missing HOL entry or a genuinely light week.

### Weekly Reconciliation

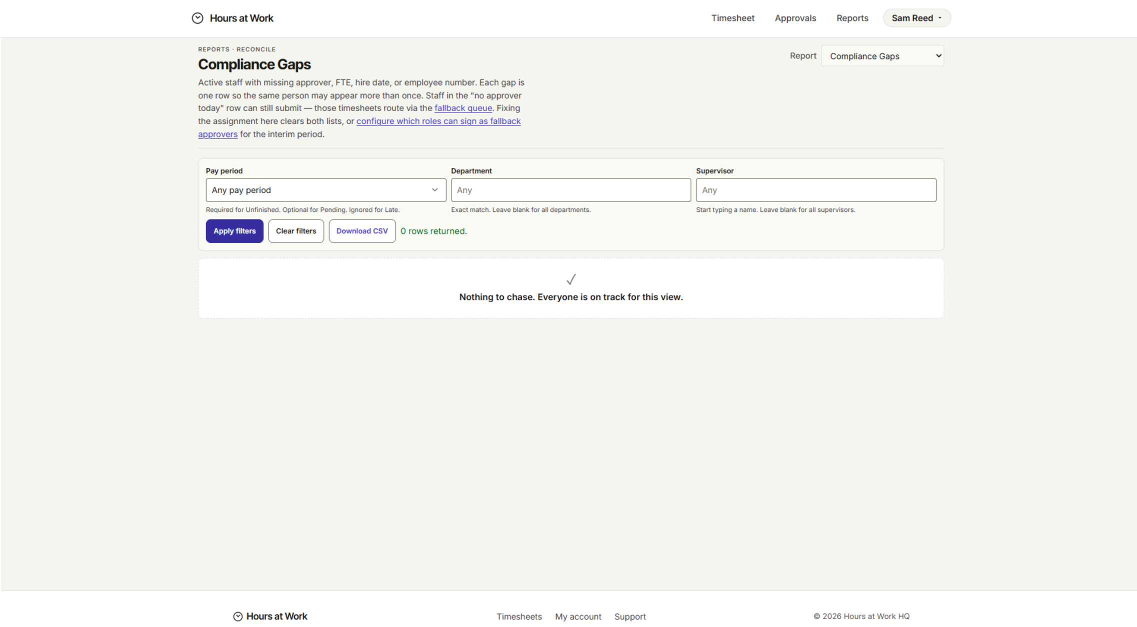
Reports → **Weekly Reconciliation**. Per-employee table by department with worked hours, leave hours, total, expected, variance. The CSV mirrors your payroll vendor template.




Row-level **Details** opens the drill-down modal. If the staff member hasn't logged anything yet, the panel says "No hours entered yet for this week" — you'll know immediately that the click worked and the person is simply empty.

## Compliance Gaps

Reports → **Compliance Gaps** → **Apply filters**. The **GAP** column tags each row with **No approver**, **No hire date**, or **No employee #**.




> *The **SUPERVISOR** column header shows the staff member's currently-assigned Approver. Read "supervisor" here as "approver" until the label catches up.*

A **No approver** row is not blocking. Since v2.89.0, staff without an assigned approver can still submit — their timesheets route to the workspace's **fallback queue** where an Admin or eligible analyst signs them. The gap is still real: funder audits expect a proper Approver assignment, and closing the assignment clears both this row and the fallback-queue entry.

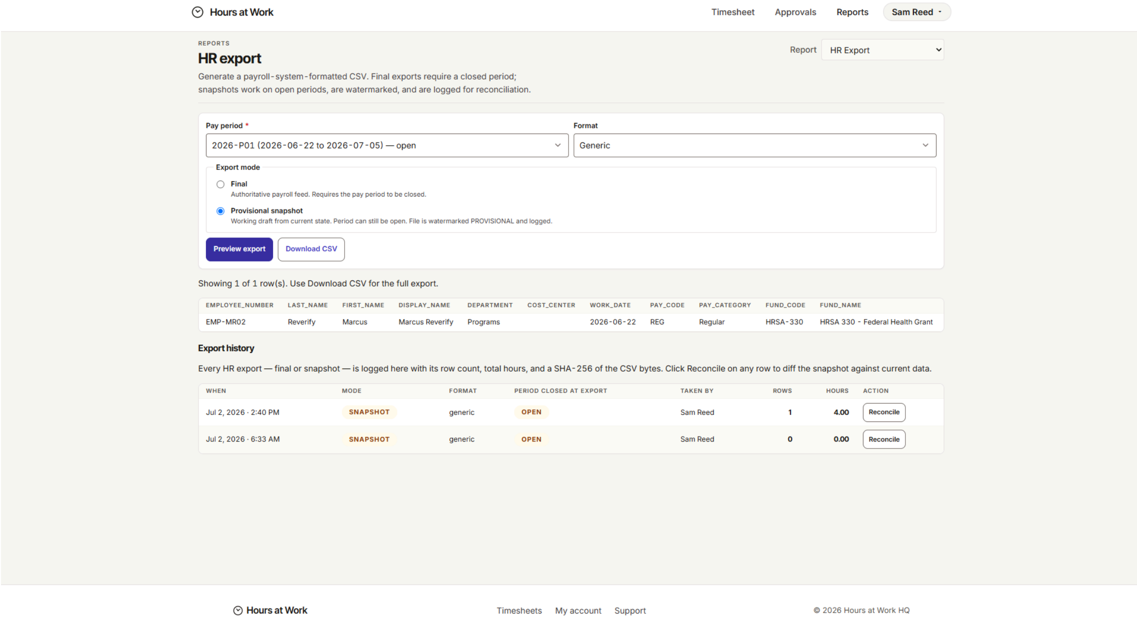
A missing **Employee #** is quieter and worse. The HR Export silently drops staff without an Employee #, so their hours never reach payroll. A missing **hire date** breaks tenure-based reporting. Neither surfaces to the staff member directly, so this report is often the only place you catch either.

## HR Export

Reports → **HR Export**. Three things to pick:

- **Pay period** — the closed pay period.
- **Format** — Generic, ADP, Paychex, or QuickBooks.
- **Final** or **Provisional snapshot** — Final requires the period to be closed; Provisional is watermarked and logged.

Click **Preview export**, then **Download CSV**. The file uses Pay categories (REG, OT, HOL, VAC, SCK) in `PAY_CODE` / `PAY_CATEGORY` columns. Charge code info rides in `FUND_CODE` / `FUND_NAME`.




The on-screen preview and **Export history** region show dates in medium format (Jun 28, 2026). The CSV file itself stays in ISO YYYY-MM-DD because every payroll system parser depends on that shape.

Every export is recorded in the **Export history** region at the bottom — who ran it, when, whether it was Final or Provisional. That's your audit trail if payroll ever asks why two CSVs of the same period exist.

## After payroll runs — close and lock the period

Tell your Admin to:

1. Mark the pay period **CLOSED** in Settings → Pay periods.
2. Apply a **Period lock** with the **Lock through date** set to the period end date.

If any timesheets in the period were auto-locked without an approver signature (Admin locked the period before the approver could sign), they show up in fiscal reports tagged with `unverifiable_reason=auto_locked_no_approval` and do not produce a Signed PDF. Talk to your Fiscal Analyst — a reopen-and-retro-sign is the usual fix.

## Weekly spot-checks between pay periods

Run Weekly Reconciliation for the most recently closed week. Catch small variances early — small and frequent is noise; large is usually a misallocated charge code or a forgotten leave entry.

## Working with drill-down modals

Three reports — Late Submissions, 40h Threshold, and Weekly Reconciliation — open a drill-down modal when you click Details on a row. The modal is read-only and shows the same information regardless of which report you opened it from:

- **Header** — the staff member's name, the pay period, the work week, and the timesheet status (DRAFT, SUBMITTED, APPROVED, REJECTED, or LOCKED).
- **By-day totals** — a seven-column strip of worked and leave hours per day.
- **By-charge-code totals** — the hours split by charge code for that week, with charge code kind and funder name where applicable.
- **Submitted-at and approved-at timestamps** — in medium format with time of day.
- **View signed PDF** — a link that opens the Signed PDF for the timesheet, if one exists.

Two things about the Signed PDF link. First, it works for both APPROVED and LOCKED timesheets — the LOCKED status just means the pay period was locked after approval, and the signature is still on file. Second, it does *not* appear for timesheets that were auto-locked without an approval signature. Those timesheets are unverifiable by definition; there's no PDF to link. If you expected a PDF and don't see the link, the timesheet was likely auto-locked before the approver could sign — check with your Admin about a reopen so the approver can retroactively sign.

The drill-down empty state ("No hours entered yet for this week") appears when you drill into a row whose staff member is in the report but hasn't logged anything for the week. This can happen on Weekly Reconciliation when a row is included on department-membership grounds but the person didn't work that week.

**Why this matters.** Before v2.97.0, HR Analysts had no way to see the per-day breakdown behind a report row without asking the approver or the staff member. That made every "UNDER by four hours" investigation a phone call. Now the answer is one click deep — you can decide whether the row is a missing HOL entry or a real light week without leaving the report.

## Reports and outputs

| Report | What it shows | When to use |
|---|---|---|
| Payroll Readiness | Per-staff rollup for one pay period | Every day during a close |
| Unfinished | Staff with draft / submitted-without-signature / rejected | Daily chase list |
| Pending Approvals | Submitted timesheets in an approver's queue; fallback-queue rows named as such | Daily |
| Late Submissions | Submitted after the workspace Submission deadline; row-level drill-down | Close day; evidence |
| 40h Threshold | OT / ON TRACK / UNDER for one Monday-start week; row-level drill-down | Close day |
| Weekly Reconciliation | Per-employee worked + leave + total + variance; row-level drill-down | Close day + spot checks |
| Compliance Gaps | Active staff with No approver / hire date / employee # | Close day |
| HR Export | CSV of approved hours by Pay category | Close day, last step |

Every report has a **Download CSV** link. Dates on screen render in medium format; dates in CSVs stay in ISO YYYY-MM-DD.

## Troubleshooting

### Payroll Readiness shows everyone BLOCKED

The pay period probably wasn't seeded for the right weeks. Ask your Admin to open Settings → Pay periods and confirm the period exists and covers the right date range.

The other common cause is a genuinely empty future period — pick the most recent `closed` period instead and confirm it shows clean.

### 40h Threshold shows UNDER for someone you expect at full time

- Their **FTE** may be set wrong on the User profile.
- They may have logged time but forgotten a HOL or VAC entry. Click Details on the row and check the per-day breakdown in the drill-down modal.

### Late Submissions list is huge

The Submission deadline (Settings → Workspace) may be too aggressive. Talk to your Admin. The fix only applies to future periods.

### HR Export CSV is missing someone

Three checks:

- Their **Employee #** or default **Pay category** may be missing on the User profile.
- Their timesheet may not have APPROVED status. Run Pending Approvals to find it.
- If your workspace anchors weeks on Sunday but runs Monday-start pay periods, and you were on a version before v2.99.4, the export may have silently dropped timesheets whose week straddled the pay period start. On v2.100.0 or later this is fixed — re-run the export.

### Compliance Gaps flags a missing approver signature

Open Approvals → Approved, filter to the pay period. If it isn't there, ask the approver to sign it — or, if the staff member had no active Approver assignment on the week in question, check the fallback queue where an Admin or eligible analyst can sign. If the timesheet is signed but Compliance Gaps still flags it, check Settings → Approver assignments for the effective date.

### Reports look different after the upgrade

If your workspace anchors weeks on Sunday but runs Monday-start pay periods, older versions could silently drop timesheets whose seven-day span crossed a pay period boundary. Since v2.99.5, Payroll Readiness, HR Export, Unfinished, Pending Approvals, Late Submissions, and Weekly Reconciliation all correctly credit those hours to the containing period. Compare a period you closed before the upgrade against the same period today and you may see hours land in a different period. This is a one-time correction; steady-state numbers match cleanly from here.

### Recovering from a blocked bulk-import rollback

If your Admin tries to roll back a bulk import and hits a blocker because some imported staff already have APPROVED timesheets, they'll see a **reject-approved for rollback recovery** option inline in the blocker modal. That retracts the approver's signature on the specific timesheets so the rollback can proceed.

Reject-approved is distinct from **Reject** on the Approvals queue, which sends a submitted timesheet back to the staff member for edits. Reject-approved is destructive to the approval record — coordinate with the affected approvers before you use it, and expect to re-sign the timesheets after the rollback lands.

End of HR Analyst Manual.