2026

Microix Modern Timesheet Module

Requester and Approver Quick Start Guide

NOTE: THIS GUIDE CAN BE CUSTOMIZED BY YOUR ORGANIZATION MICROIX ADMINISTRATOR TO REFLECT YOUR ORGANIZATION'S PROCESS BEFORE DISTRIBUTING TO STAFF.

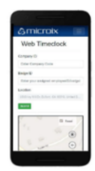
Table of Contents - **Tip:** Hold **Ctrl** and click a link to jump to that section instantly.

Quick Overview

About the Microix Timesheet Module

The Microix Timesheet Module allows employees to enter their time electronically and route their timesheets through a multi-level approval process. After the final approval, Microix updates the employee's payroll distribution based on the hours entered and creates a regular timesheet in the MIP Fund Accounting™ Payroll Module.

⏱ Overview of Microix Time Tracking Options-Microix supports four flexible methods for tracking employee time. Please refer to the option(s) your organization uses:

📋 Blank Template	🗓 Shift Schedule	🌐 🕓 Web Timeclock	Biometric Timeclock
Manual entry of total hours; ideal for salaried or flexible roles. 	Assign preset shifts (e.g., 9–5, 2–10). 	Clock in/out in real time via browser. 	Secure, physical clock-in using one or more of these options: • 👤 Face Recognition • 🖐 Fingerprint Scan • 💳 RFID Card Swipe Or Key Fob (sold separately) 

Prerequisites for Requesters and Approvers Using This Guide

This guide covers all major Timesheet functions, but you will need to know how your organization is configured to follow the correct steps.

1. How your organization collects time Your setup may involve:
- Entering total hours (e.g., keying in "8" hours)
- Using time punch data from a web or biometric timeclock
- A combination of both (salaried vs. hourly employees)

2. Your organization's processing flow Workflows vary and may include:
- Who creates the timesheet
- How it is created (blank, shift schedule, or punch-based)
- How it moves through approvals
- Whether supervisors review punch data first

Because each organization is configured differently, no single guide fits all scenarios. Once you know which method your organization uses, you can follow the sections that apply to your workflow.

Access & Login Information

This section walks you through accessing and changing your default password for **Microix Workflow Modules Modern**.

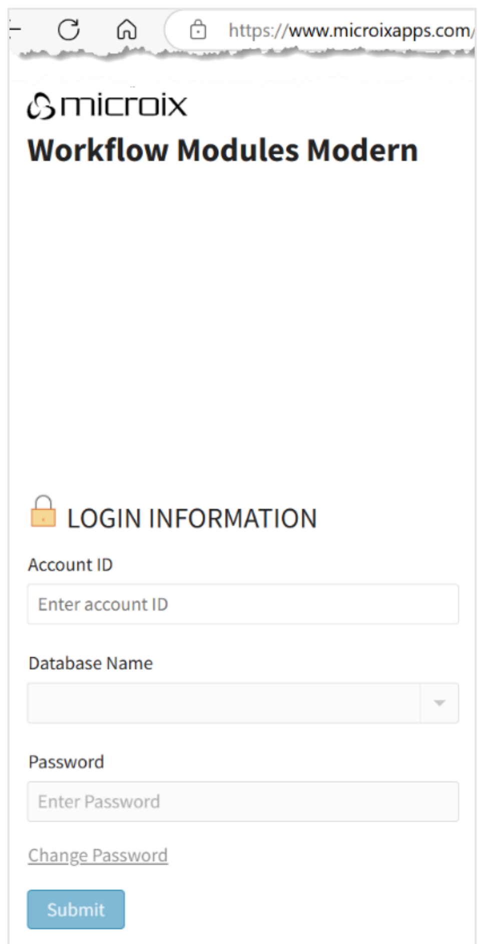
Note: Your Organization Microix Administrator will send your Welcome Email with login instructions and the Workflow Modern URL. If you don't receive it or lack access to certain menus or buttons, please contact your Microix Administrator.

⭐ Tip: Bookmark the page for quick access next time.

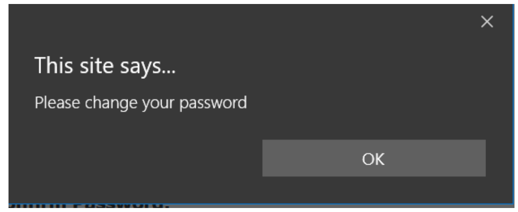
⚠️ Important: Classic Web users must reset their password—old credentials won't work in the Modern version

Steps to Access Microix Workflow Modules Modern

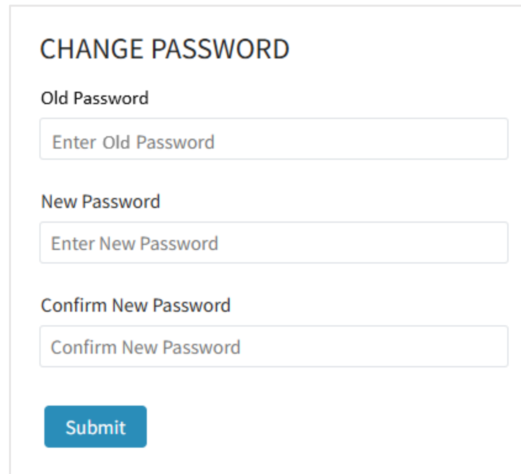
1. **Open a Web Browser**:
    - Navigate to **www.microixapps.com/login**.
2. **Enter Login Credentials**:
    - Input your **Account ID=your email address** (not case-sensitive).
    - Select the appropriate **Database**, if required.
    - Enter your **Password**.
3. **Submit Credentials**:
    - Click the **Submit** button.



Changing Your Password



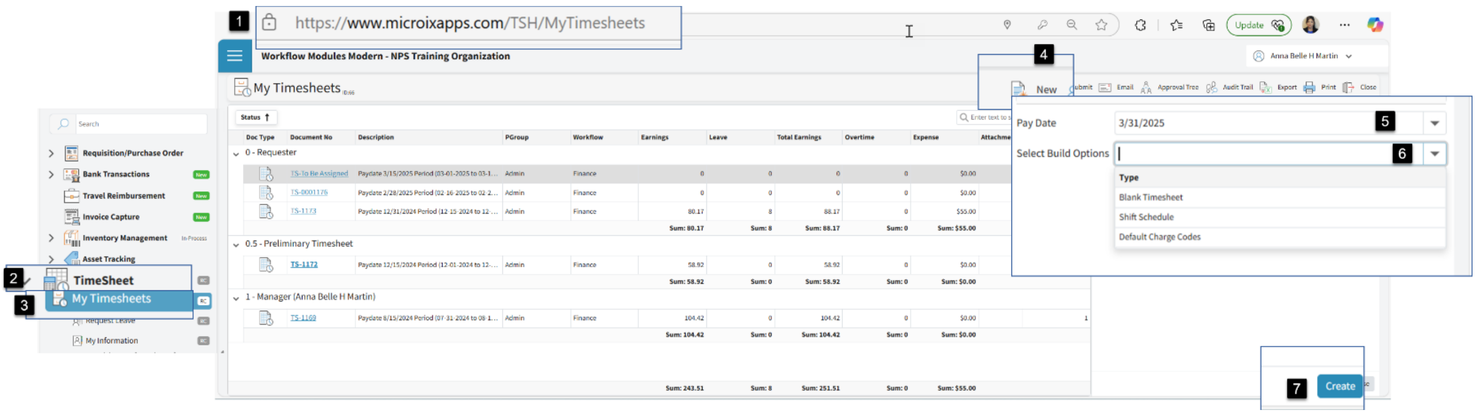
1. **Prompt to Change Password**:
   - Upon login, a pop-up will appear requesting you to change your password. Click **OK** to proceed.
2. **Input Old Password**:
   - Enter your current (default) password.
3. **Create New Password**:
   - Enter your desired new password that meets the requirements.
   - Confirm your new password by re-entering it in the **Confirm New Password** field.
4. **Save Changes**:
   - Click **Submit** to save the new password.



Timesheets

How To Create A New Timesheet Based On:

Overview of Steps to Create a New Timesheet
Whether using a blank timesheet, a shift schedule, or imported clock hours, here's how to get started.



:

Steps to Create a New Timesheet:

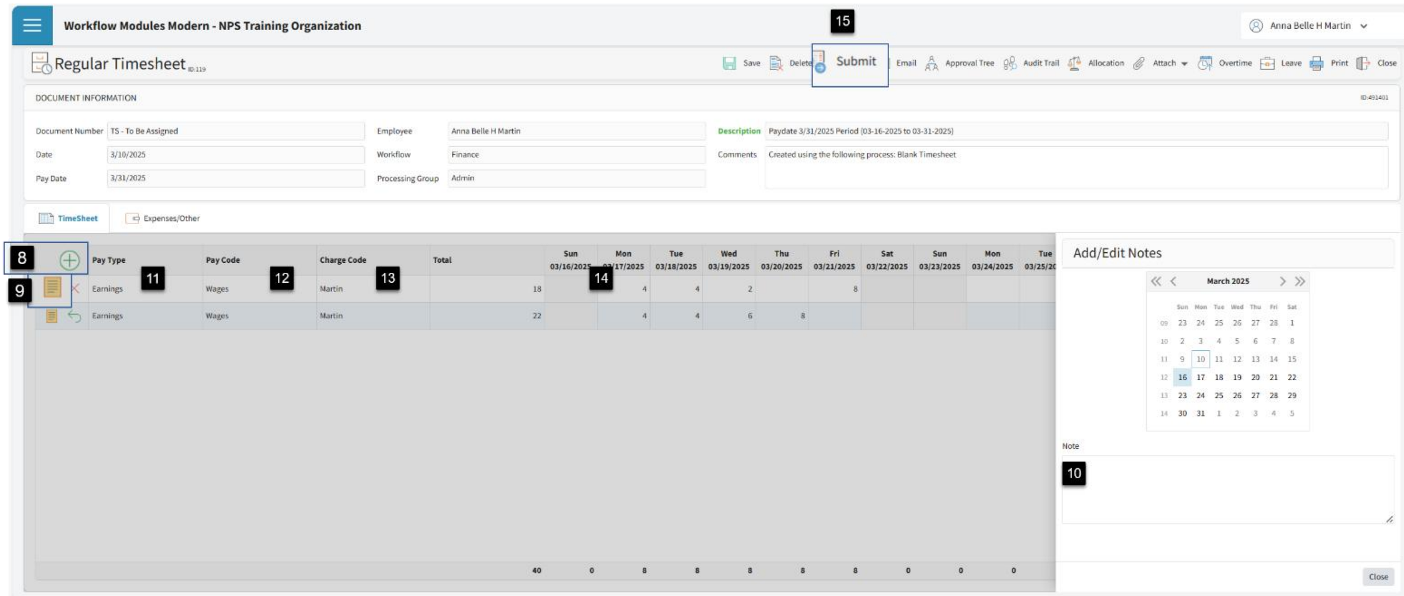
1. **Log in** to the Workflow Modules Modern platform.
2. Access **Timesheet** drop-down menu:
3. From the left-side menu, Select **My Timesheet**.
   Initiate a New Timesheet:
4. Click the **"New"** button located at the top of the My Timesheet page.
   Configure Timesheet Details:
   The **New Timesheet Creation Panel** will appear on the right side of the screen.
5. Select the appropriate **Pay Date** for the timesheet.
6. Choose a **Build Option**:
   Select one of the available options based on your individual process.

   Blank Timesheet – Create a timesheet from scratch.
   Shift Schedule – Use a predefined shift schedule.
   Clock Hours – Pull hours from the clock-in/clock-out records.
7. Click the **"Create"** button at the bottom of the panel.

The system will generate a **new blank timesheet document** for further input.

Blank Electronic Timesheet

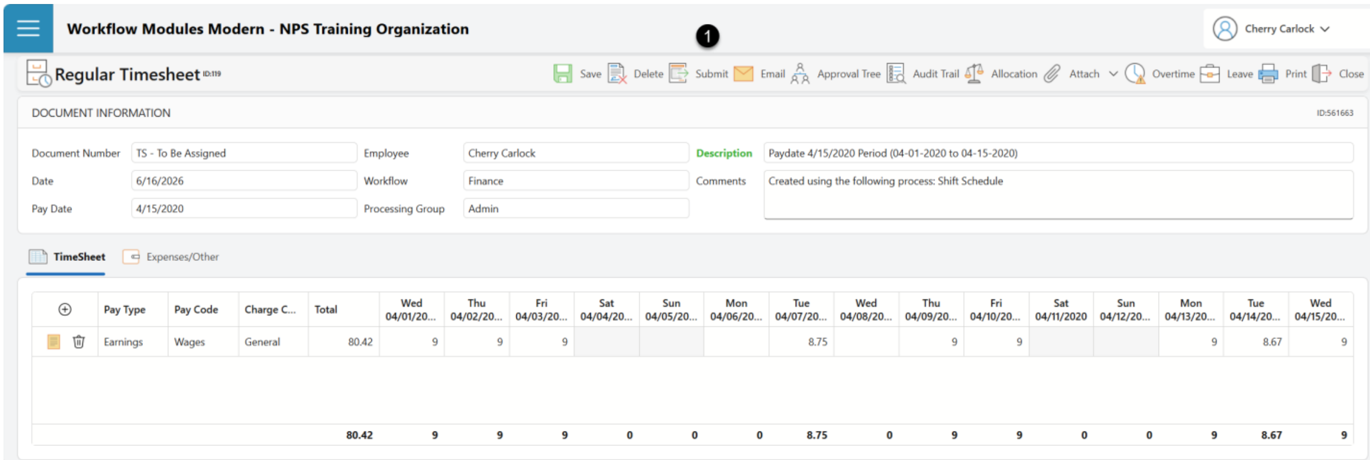
*Screen Shot for Steps to **Adding a new time entry** (steps 8-15)*



Adding a New Time Entry

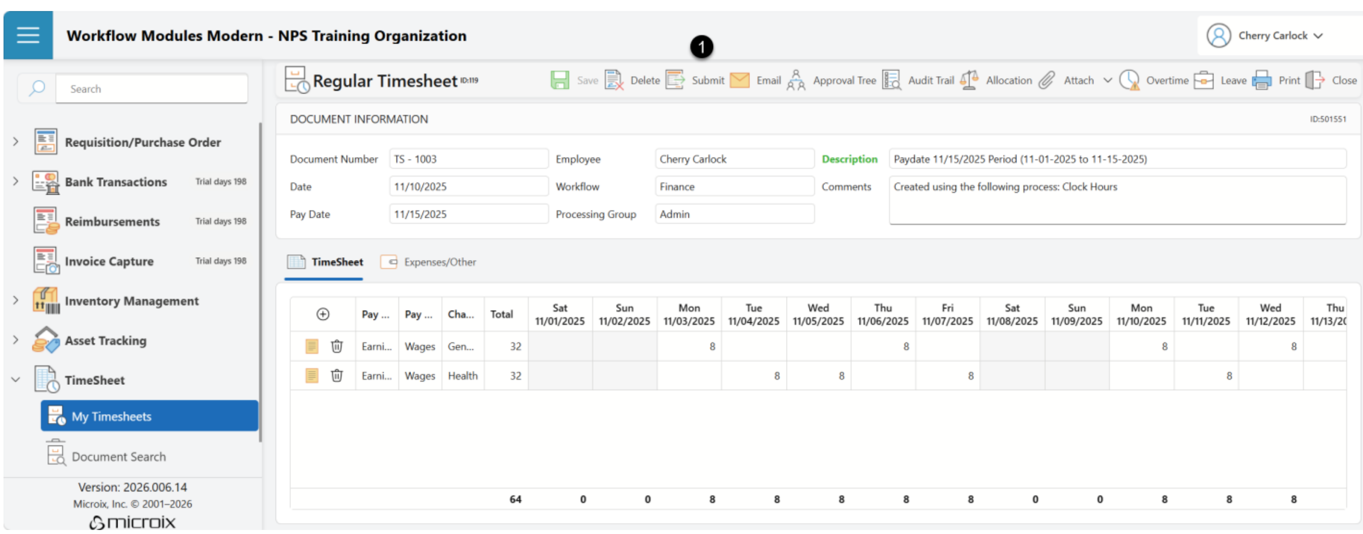
8. Click the **"+" (Add Row) button** to insert a new time entry.
9. **Add Notes (If required)**
10. In the "Add/Edit Notes" panel (visible in the lower right), click a date on the calendar. Enter any relevant details in the **Note** field.
11. **Select a Pay Type, Pay Code, or Charge Code** (if instructed).
12. **Select a Pay Code** (if instructed).
13. **Select a Charge Code** (if instructed).
14. **Enter the hours worked** for each day in the respective column. The system will automatically **calculate totals** based on your input.
15. Select **submit** for approval button when ready to do so.

Timesheet Using A Shift Schedule



- Go to page 5.
- Follow Steps 1–5 as shown on the page.
- For Step 6, select "**Shift Schedule**."
- Complete Step 7.
- Review all entries for accuracy.
- Submit the timesheet for approval as shown above.

Timesheet From Clock Hours (Clock In/Clock Out Records)



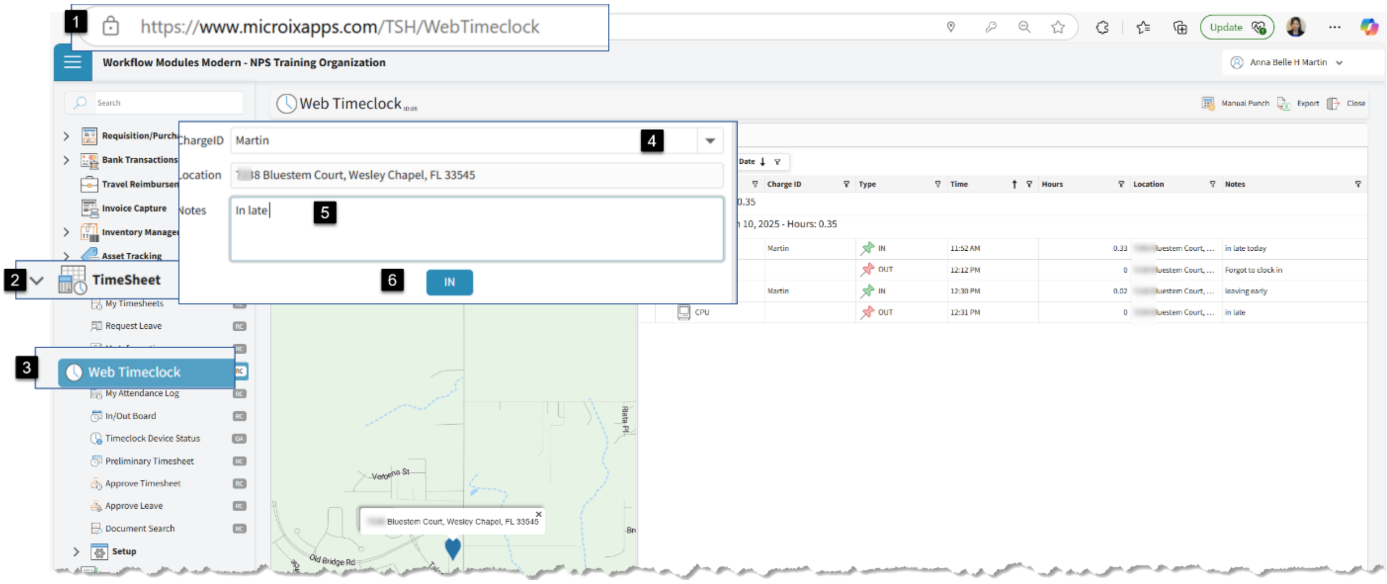
- Go to page 5.
- Follow Steps 1–5 as shown on the page.
- For Step 6, select **"Clock hours"**
- Complete Step 7.
- Review all entries for accuracy.
- Submit the timesheet for approval as shown above.

Web Timeclock

How To Clock In & Out

NOTE: *If the web Timeclock is disabled, contact your Microix administrator to grant you access to this function.*

- *Use phone GPS or WIFI location to track location when clocking IN/OUT*
- *Attendance log history with location data*



How to Clock In Using the Web Time Clock

1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to the **Timesheet** dropdown menu.
3. Click on **Web Timeclock**.
4. **Charge ID**
   - Ensure your **Charge ID** and **Location** fields are correct.
5. **Notes (Optional)**
   - Add any necessary notes if needed.
6. Click the **blue "IN" button**
   - Your **attendance log** will update with the **clock-in time and location**.

How to Clock Out Using the Web Time Clock

Follow **steps 1-5** above, then:
6. Click the **"OUT" button**

- Locate and click the **"OUT" button** in the same area.
- Your **time log** will be updated accordingly.

Biometric Timeclock

How To Clock In And Out

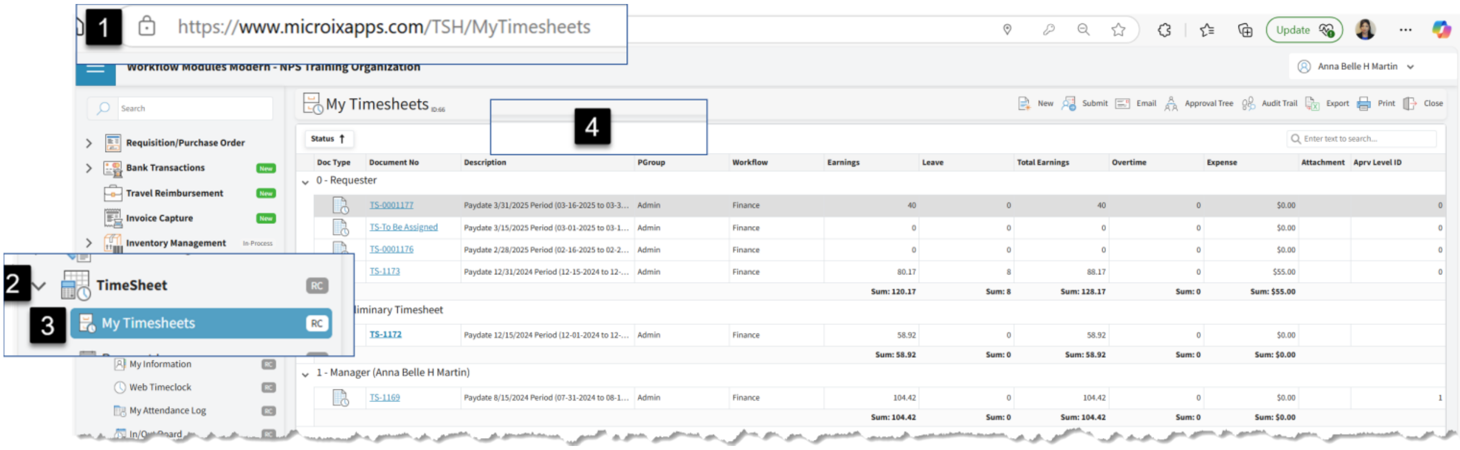
Prerequisite: Once an employee is loaded into Microix, the administrator creates a basic profile (name and ID), which is then sent to the biometric clock. The employee will locate their profile on the clock and follow the prompts to add their face or fingerprint. Profiles should always be created in Microix and synced to the clock.

Clocking In / Clocking Out

Employees will verify their identity using the biometric method(s) enrolled and enabled by the organization.

1. **Approach the device** and stand in front of it. The camera will auto-tilt to adjust to your position.
2. **Verify your identity** using your assigned method:
   - **Facial Recognition:** Look directly into the camera.
   - **Fingerprint:** Place your finger flat on the sensor.
   - **RFID / Key Fob:** Tap or swipe your card/fob over the reader.
3. The device will **capture your biometric** and match it to your employee record.
4. Once verified, the system will **instantly record your punch** (Clock In or Clock Out).

How To Locate A Submitted Timesheet

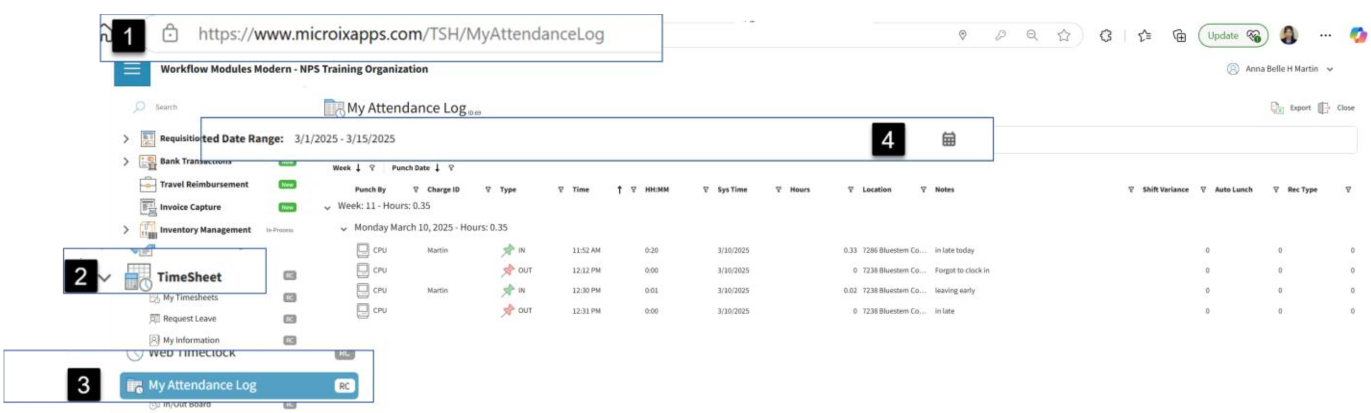


How to locate your timesheet that was submitted for approval.

1. Log in to the Workflow Modules Modern platform.
2. Access **Timesheet** drop-down menu:
3. From the left-side menu, Select **My Timesheet**.
4. **Locate your timesheet** or can search using the top blank field to View, Print, Export etc.:

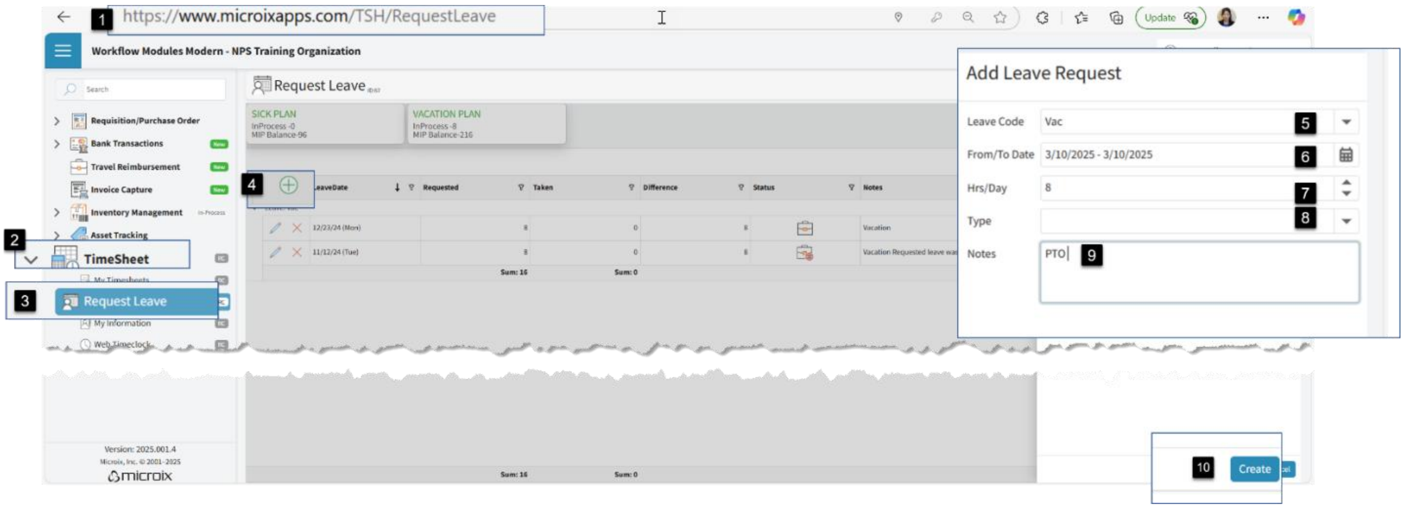
My Attendance Log

To retrieve time clock entries for a given period.



1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet.**
3. Click on **My Attendance Log.**
4. **Select the Date Range** to view your attendance records.

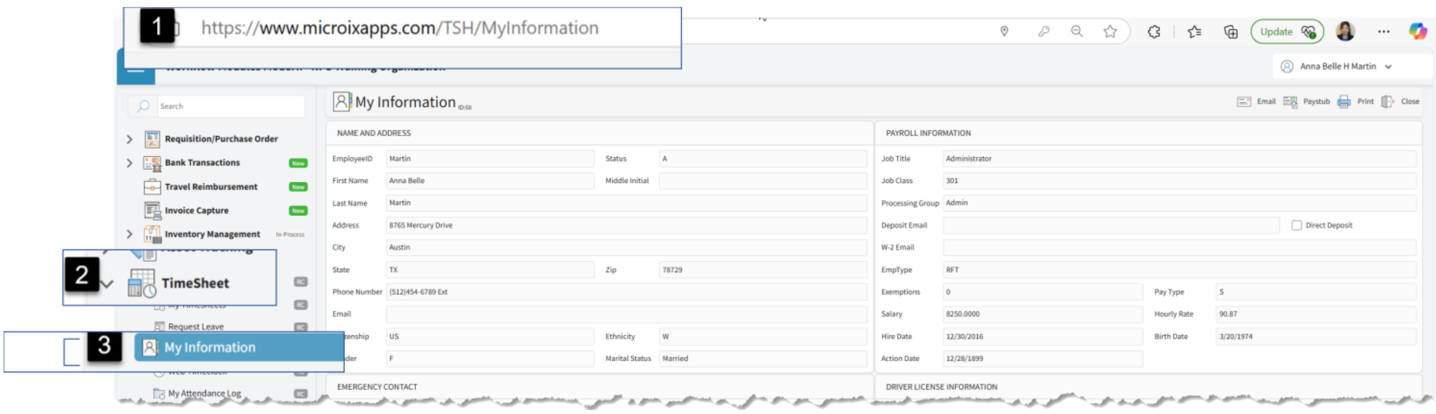
How To Request Leave



1. **Log in** to the Workflow Modules Modern platform.
2. **Open Request Leave Page:**
   - From the left-hand menu, expand the **Timesheet** dropdown.
   - Click on **Request Leave**.
3. **Start a New Leave Request:**
   - Click the **"New"** button at the top of the page.
4. **Enter Leave Details:**
   - A panel will appear on the right side of the screen.
   - Select the appropriate **Pay Date** for the timesheet.
5. **Select Leave Code:**
   - Available leave codes will be automatically pulled from your default Timesheet in a MIP FA.
6. **Set Leave Duration:**
   - Choose the **From Date** (start) and **To Date** (end) of your leave.
7. **Specify Leave Time:**
   - Enter the total number of **hours only** (e.g., 4 hours for partial day, 8 hours for a full day)
8. **Choose Leave Type:**
   - The list of leave types will also be retrieved from your MIP default Timesheet.
9. **Add Notes (Optional):**
   - Include any comments or extra details to support your request.
10. **Submit Request:**

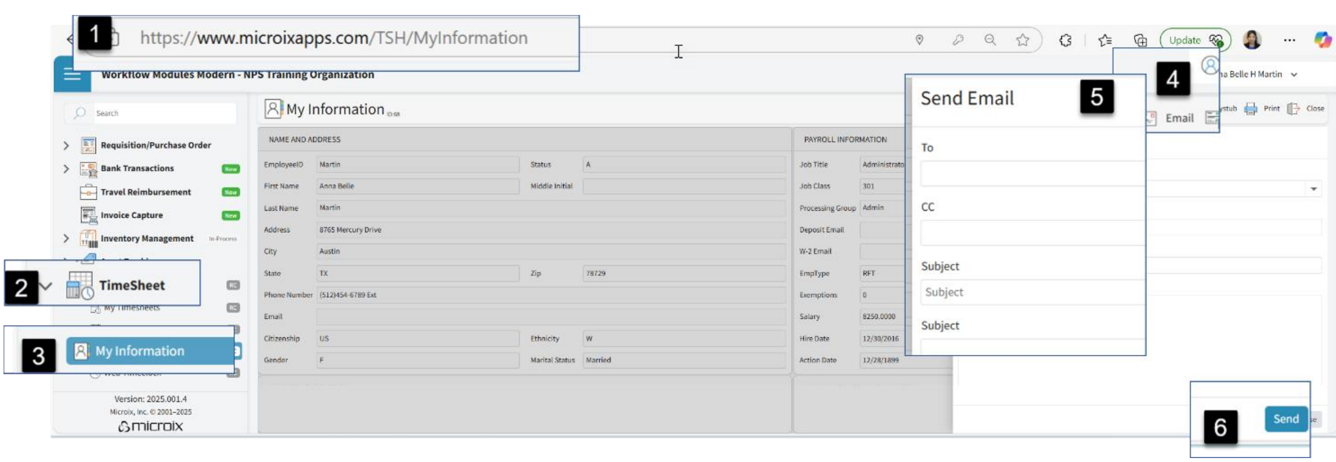
My Information

My information **provides** easy access for employees to view their demographic information and payroll information stored in MIP along with their Paycheck information.



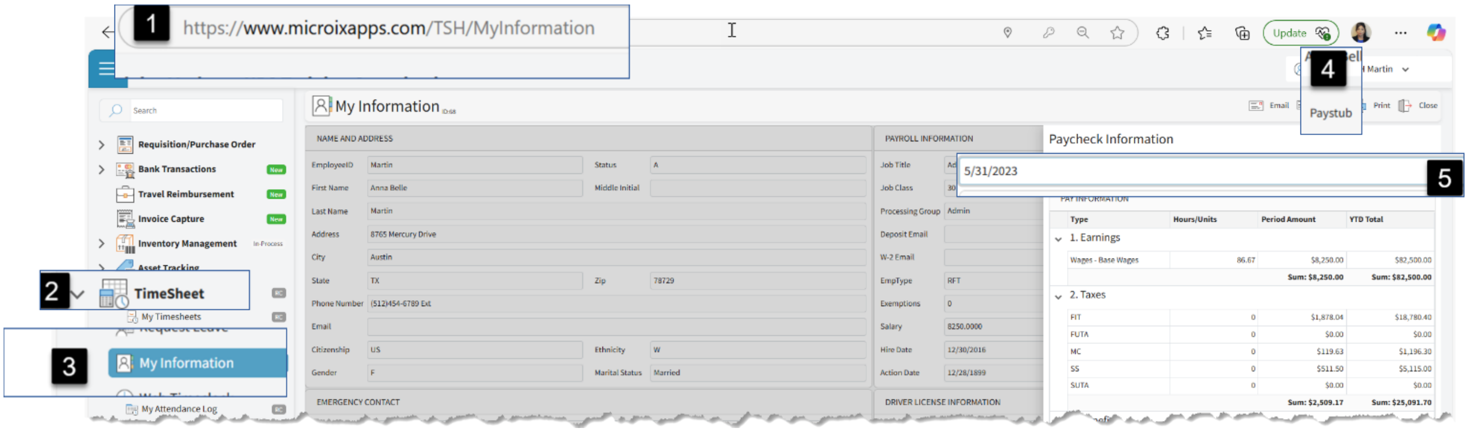
1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet**.
3. Click on **My Information** to view your details.

How To Submit A Request To Update My Information That Is Stored In MIP



1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet**.
3. Click on **My Information**.
4. Click on **Email**.
5. **Complete the form** with the necessary updates.
6. Click **Send** to submit your request.

How to View, Email, or Print Paycheck Information

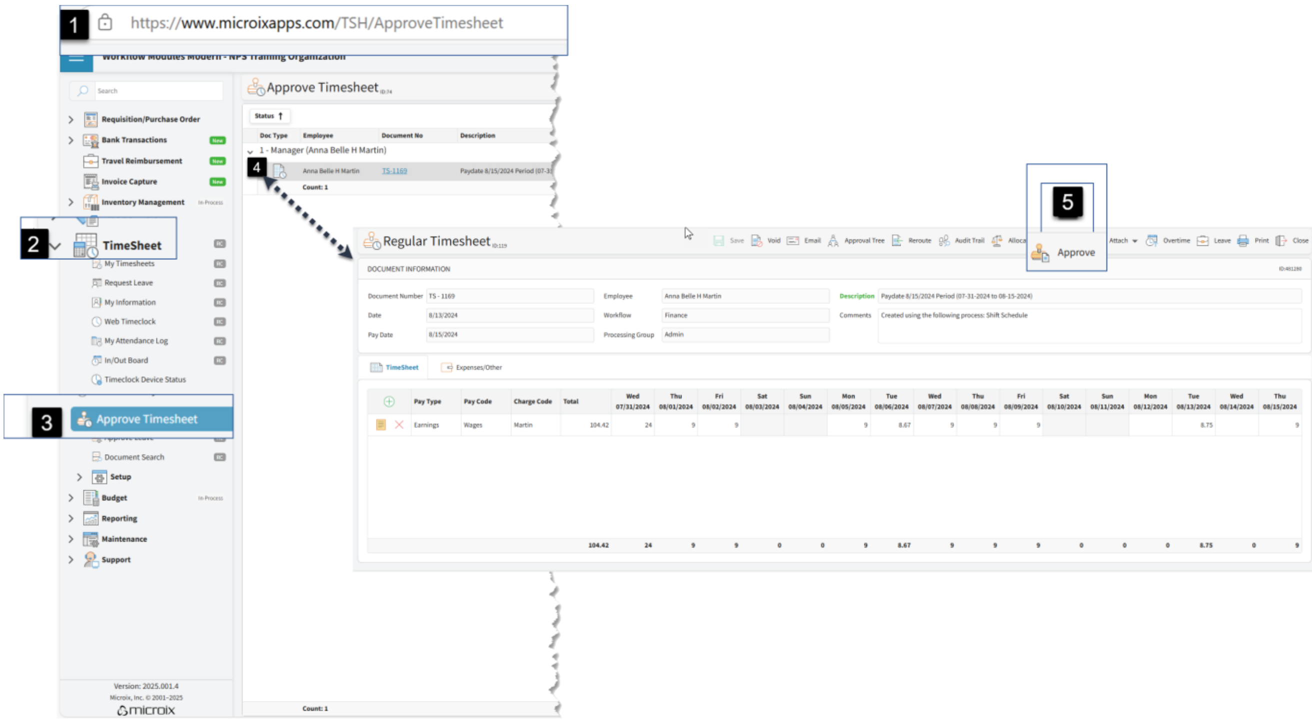


1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet**.
3. Click on **My Information.**
4. Select **Paystub**.
5. Choose the **paycheck date**, then print or email the information as needed.

Approvals

Approve Timesheet

The approver will use this form to approve timesheets that were submitted to them for approval. The system will send an email notification to each approver via their regular email client. Review the timesheet by verifying the number of hours worked per day and most importantly the charge codes of how the hours are distributed.

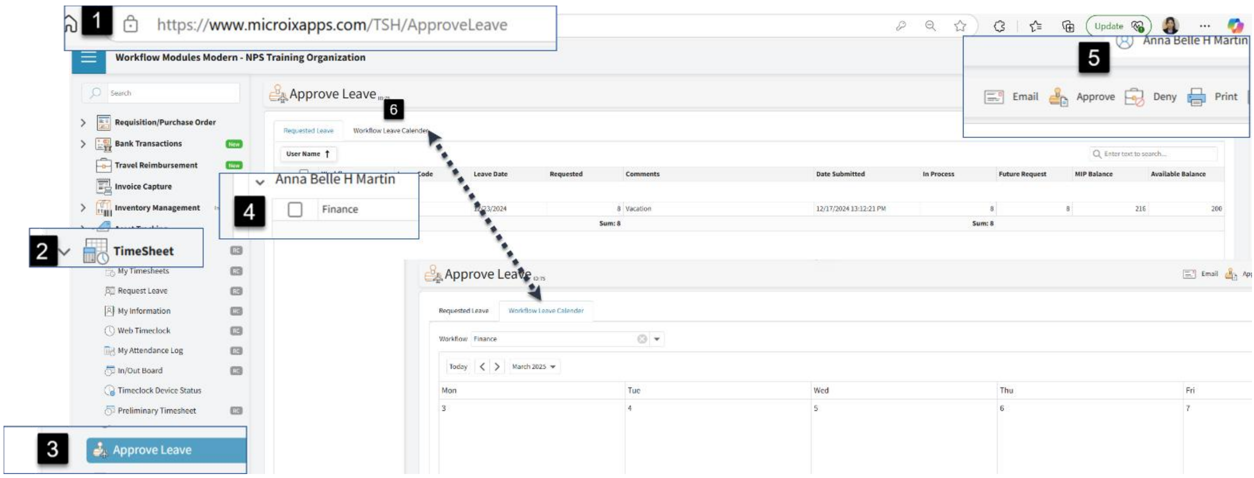


How to Approve a Timesheet

1. **Log in to** the Workflow Modules Modern platform.
2. Navigate to **Timesheet.**
3. Click on **Approve Timesheet.**
4. **Select the Timesheet to open** and:
    - Review the details.
    - Edit if necessary.
    - Email to ask a question.
    - Reroute the timesheet if needed.
    - Perform any other required actions.
5. **Submit the timesheet** to the next level approver.

Approve Leave Request

Approvers will review leave requests and can view the workflow leave calendar.

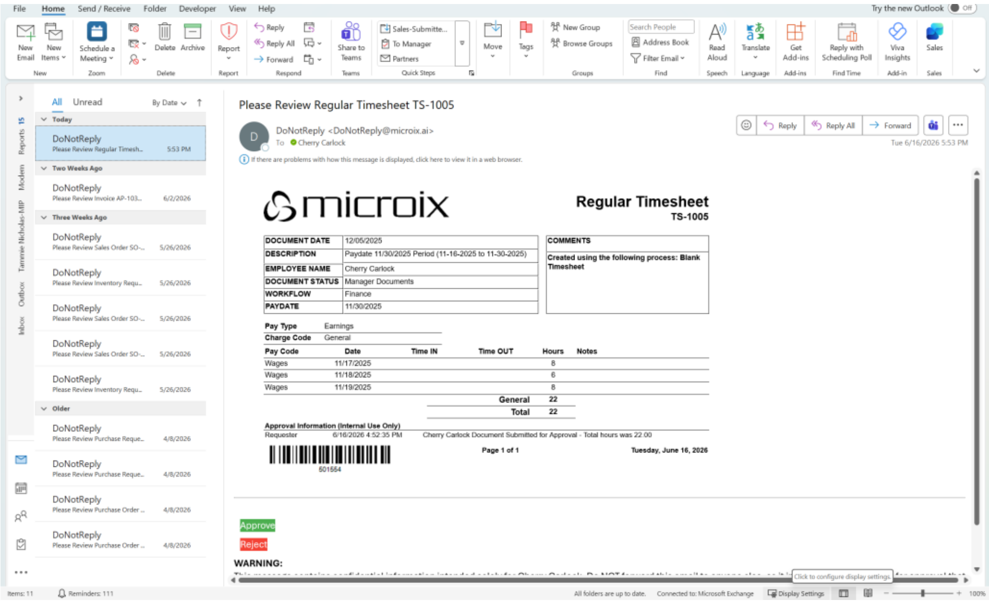


How to Approve Leave and View the Workflow Leave Calendar

1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet.**
3. Click on **Approve Timesheet.**
4. Select the **Leave Request** to open and:
5. Email to ask a question.
   - Approve the request.
   - Deny the request.
   - Print the leave request if needed.
   - View the workflow leave calendar prior to approving
   - Submit the timesheet to the next-level approver.
6. **View the Workflow Leave Calendar** before approving leave to check for scheduling conflicts.

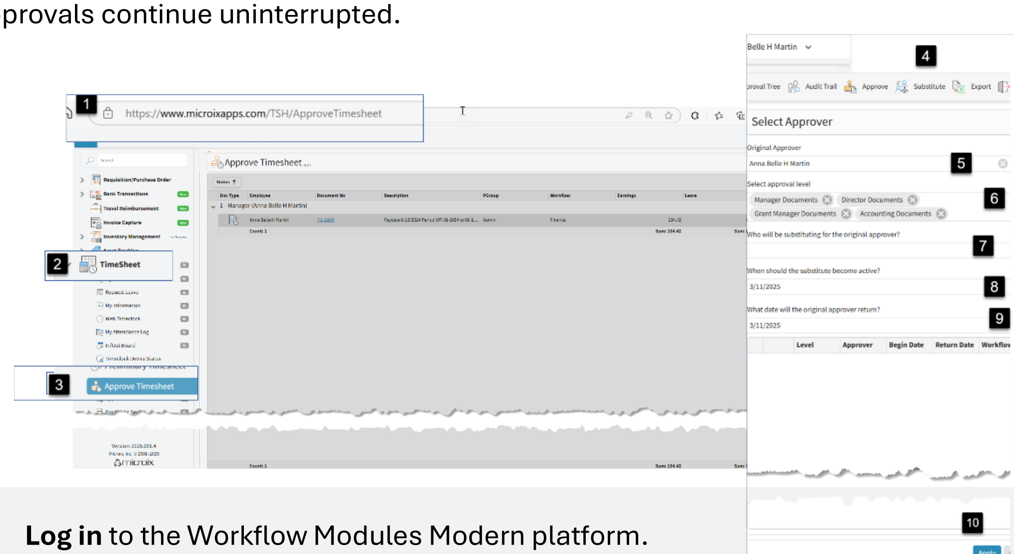
Approve Timesheet | Leave Request Via HTML Approval

Certain level approvers can approve or reject a timesheet and leave request directly within an email without logging into the software.



Substitute Approver

Designate temporary alternate approvers ahead of any planned leave or extended absence to ensure that document approvals continue uninterrupted.

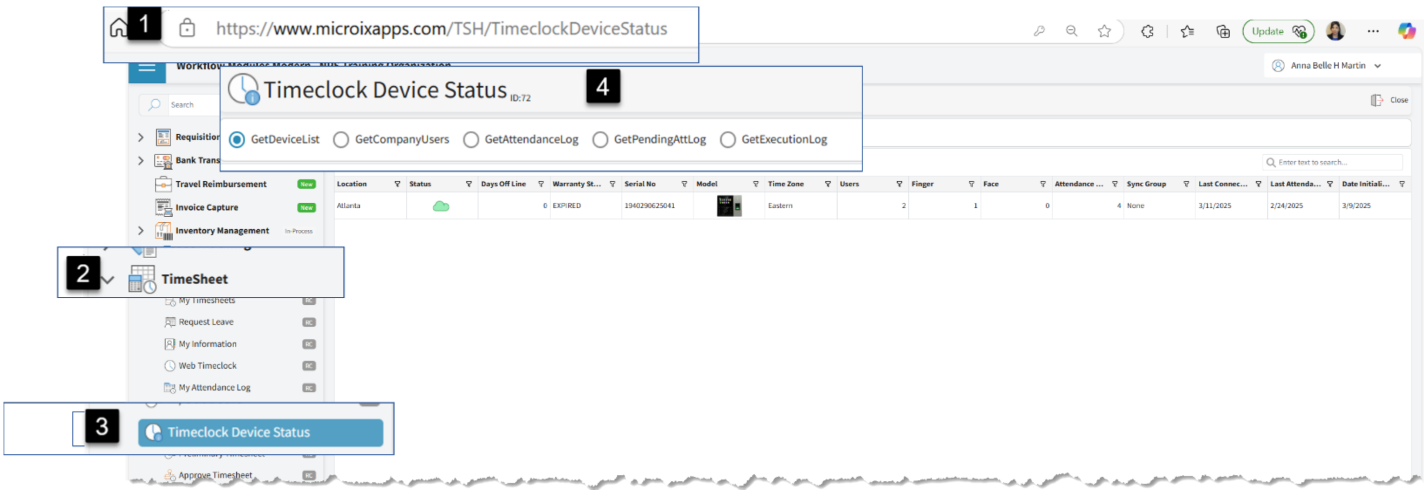


1. **Log in** to the Workflow Modules Modern platform.
2. Navigate to **Timesheet.**
3. Click on **Approve Timesheet.**
4. Select **Substitute.**
5. Choose the **Original Approver.**
6. Select the **Approval Level.**
7. **Identify** who will be substituting for the original approver.
8. **Set the activation date** for the substitute.
9. Enter the **return date** for the original approver.
10. **Click Apply** to confirm the substitution.

Supervisor Tools

Timeclock Device Status

Monitor the online status of each clock and view employee attendance logs in real-time for better workforce management.

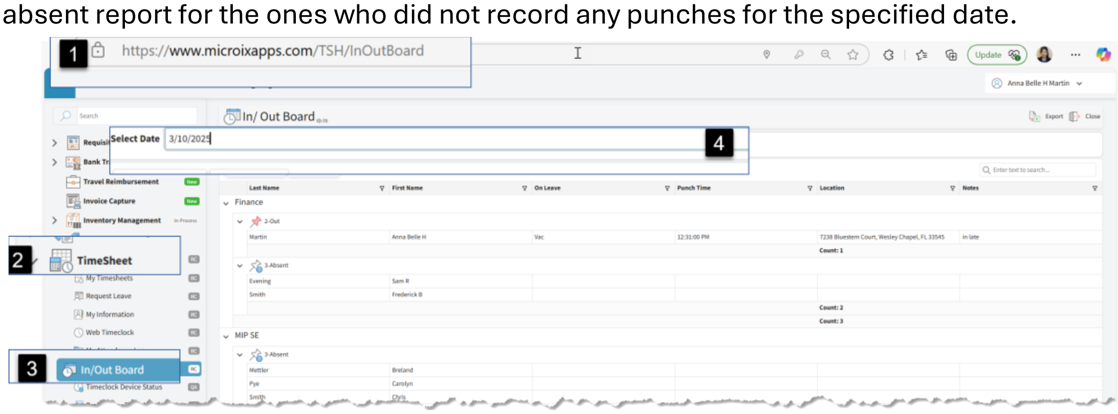


How to View Timeclock Device Status

1. **Log in** to the **Workflow Modules Modern** platform.
2. Click on the **Timesheet** dropdown list.
3. Select **Timeclock Device Status**.

How To Access The In/Out Board

The In/Out board allows you to see the current clock in/out status for each employee within the organization. It also shows an absent report for the ones who did not record any punches for the specified date.

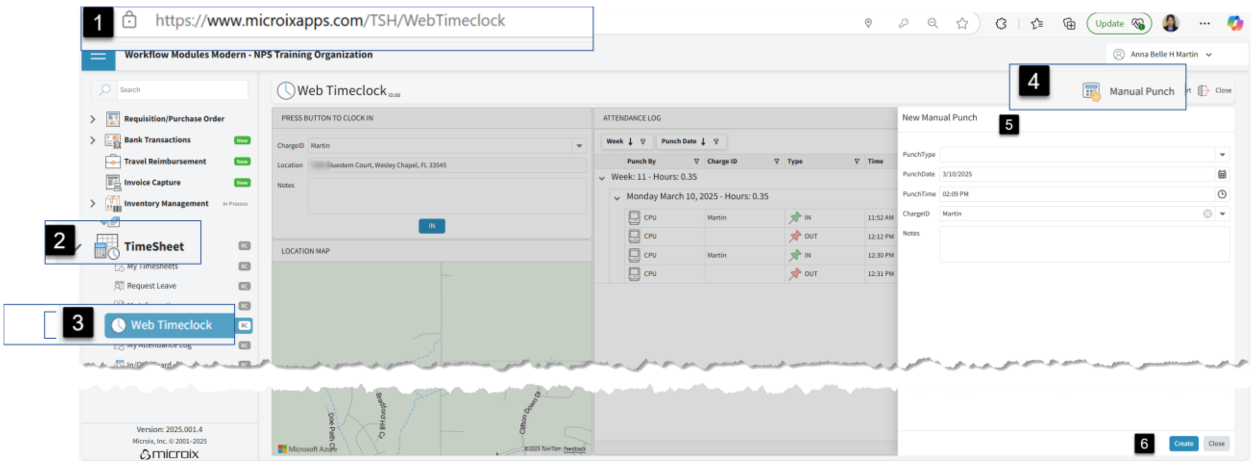


1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to **Timesheet**.
3. Click on **in/Out Board**.
4. Select the **date** to view attendance records.

Manual Punch (Only If Directed To Do So)

Employees who missed clocking in/out may utilize this form to create manual time clock entries. After creating manual entries, the system will automatically send an email notification to their immediate supervisor.

NOTE: Supervisors are not required to approve or deny manual time clock entries. It will be recorded automatically in the employee's record.



How to Create a Manual Punch

1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to **Timesheet**.
3. Click on **Web Timeclock**.
4. Select **Manual Punch**.
5. **Fill out the form** with the required details.
6. Click **Create** to save the manual punch entry

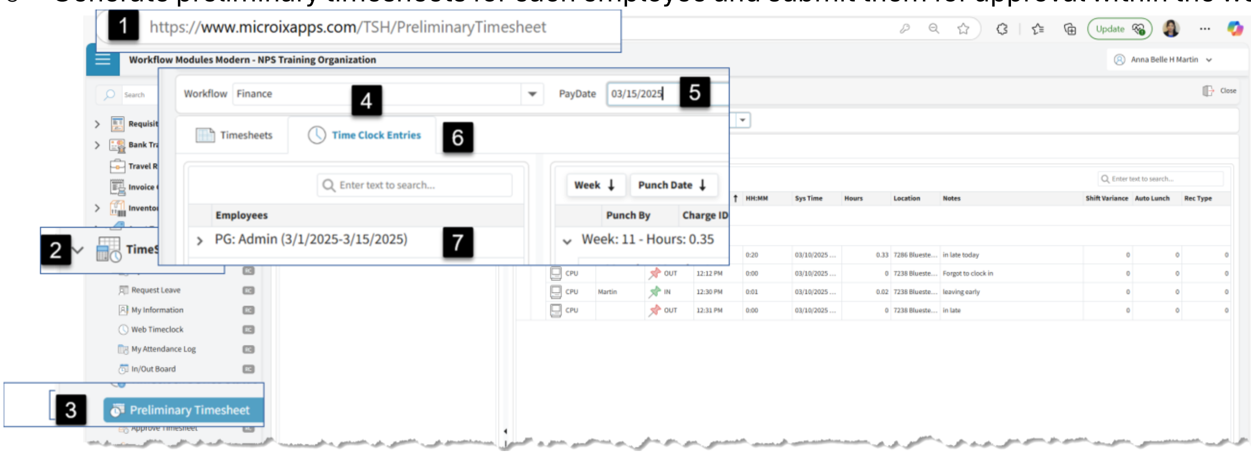
Preliminary Timesheet

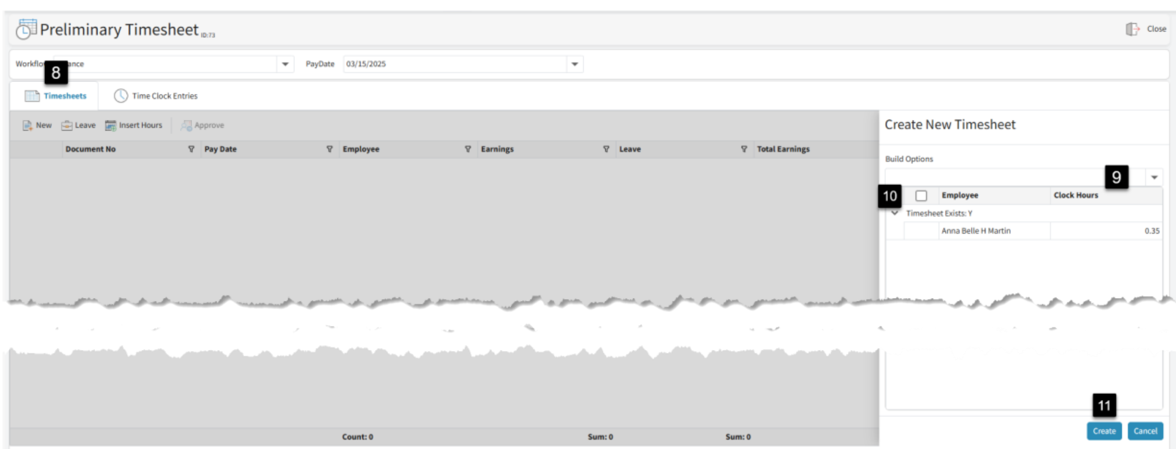
This section displays a list of all time clock entries (Web and Biometric) by and/or on behalf of the employees in each workflow.

How To Review Timeclock Entries

Supervisors/Timekeepers will use this section to perform the following tasks:

- Create missed punches for employees.
- Modify existing punch clock entries.
- Generate preliminary timesheets for each employee and submit them for approval within the workflow.





How To View And Modify Time Clock Entries, Create The Timesheet On Behalf Of The Employee

1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to **Timesheet**.
3. Click on **Preliminary Timesheet**.
4. Select **Workflow**.
5. Choose the **Pay Date**.
6. Click on **Time Clock Entries**.
7. Select the **Employee Name**.
8. Click on **Timesheets**.
9. Select an option from the **Build Option** dropdown list.
10. Choose the **Employee**.
11. Click **Create Timesheet** on behalf of the employee.

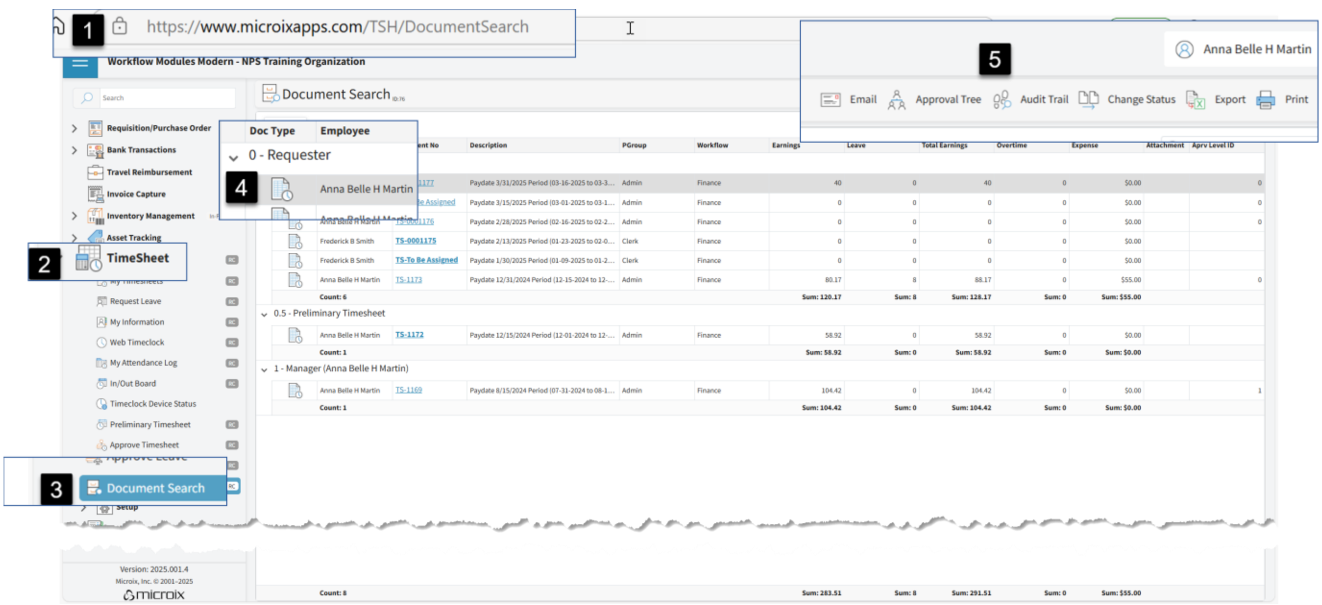
How To Modify Or Delete Entries

- Click the **delete (X) button** to remove an incorrect row.
- To **modify an entry**, simply **click inside the cell** and edit the value.

Search & Reporting

Document Search

This function is used by approvers to view the status of documents which they have approved or are scheduled to approve.

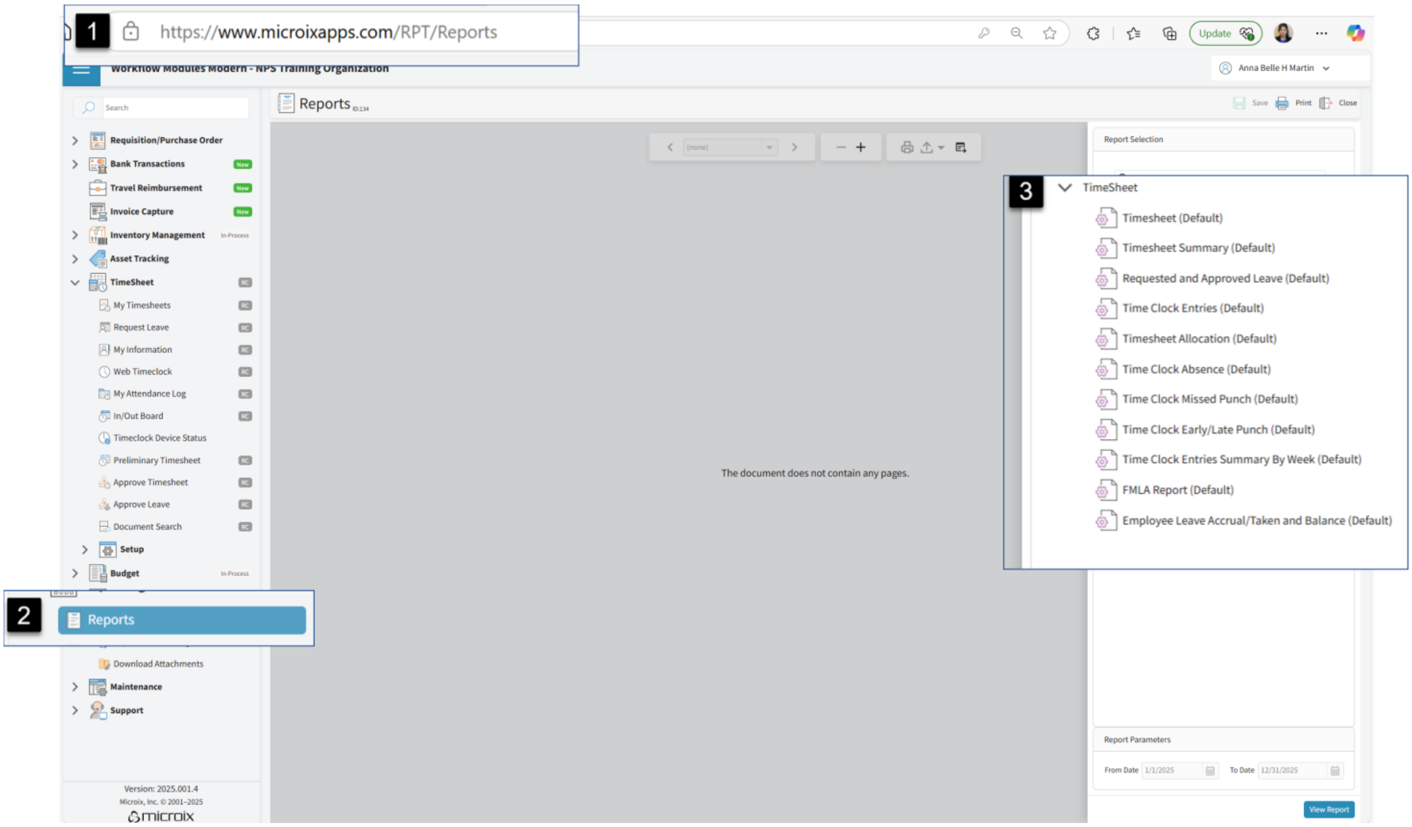


How to Access Document Search and available options

1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to **Timesheet**.
3. Click on **Document Search**.
4. Select the **desired document**.
5. Available options:
    - **Email** to ask a question.
    - **View the approval tree**.
    - **View the audit trail**.
    - **Change the document status**.
    - **Export** the document.
    - **Print** the document.

Reports

A list of reports will be available in the look-up list and you can print, save, and export the report.



How to Access Reports

1. **Log in** to the **Workflow Modules Modern** platform.
2. Navigate to the **Reports** section.
3. View the **available reports** and select the one you need.

Shared Menu And Button Options Based On Your Role

Navigation Menu Overview along with default functions based on Role . This will be based on how your organization sets default functions to Role

Frequently used buttons for Requesters and Approvers

Navigation Menu	Description	Requester Role	Approver Role
My Timesheets	This section displays a list of all timesheets for the logged in user along with other tasks	☑	
Request Leave	Enables employees to request present or future leave.	☑	
My Information	Employees can access their basic demographic and payroll data that is stored in MIP FA Payroll Module and print it if needed	☑	
Web Timeclock	Allow employees to clock in and out and create a missed (manual) punch	☑	
My Attendance Log	Query your time clock data by a date range.	☑	
In/Out Board	Displays employee's clock in/out entries for a specific date along with the in/out entries for ALL other employees	☑	
Timeclock Device Status	Reserved for Payroll Admin • Monitor the online status of each clock • View employee attendance log		☑
Preliminary Timesheet	Review employee's punches and create the timesheet on behalf of the employee		☑
Approve Timesheet	Approve timesheets or make any modifications before approving.		☑
Approve Leave	Allows an approver to approve or deny requested leave.		☑
Document Search	Approvers use this function to view the status of documents which they have approved or are scheduled to approve.		☑
› **Setup**	Reserved for Org Microix Admin		
› **Reporting**	Displays available reports that can be printed or exported		☑
› **Maintenance**	Reserved for Org Microix Admin		
› **Support**	Support Options	☑	☑

Button	Description	Requester Role	Approver Role
Allocation	Distribution Code Allocation	☑	☑
Approve	Click this button to approve		☑
	Displays the automated document routing approval	☑	☑
Attach Approval Tree	**Attach** any electronic document to your document	☑	☑
Audit Trail	The **Audit Trail** tracks changes within the document	☑	☑
Close	**Close** and return to the home screen	☑	☑
Delete	Delete the document	☑	☑
Email	Send an **Email** correspondence	☑	☑
Export	Download an Excel copy	☑	☑
Leave	Add Requested Leave	☑	
New	Create a new document	☑	
Overtime	Calculate Overtime	☑	☑
Print	**Print** a copy of your document.	☑	☑
Reroute	Click to re-route the document to a selected user from a list.		☑
Save	Save the document	☑	☑
Submit	**Submit** your document for approval	☑	

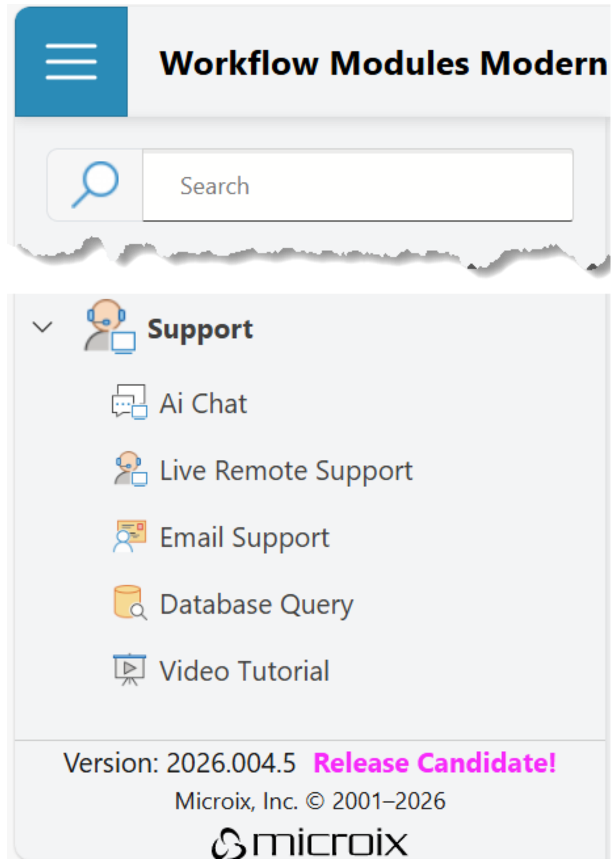
Additional Resources

Support Options You Can Access Directly from the Microix Software

The **Support** section in the Modern Workflow Modules provides quick access to all available help resources. Each option is designed to give users direct assistance depending on the type of support they need.

🧠 **AI Chat**

An integrated AI assistant that helps answer questions, guide users through features, and provides instant support without needing to contact the support team. *If the AI provides incomplete or incorrect information, please use the email Support option for clarification.*



💻 **Live Remote Support**

Mon–Fri, 9 AM–7 PM EST • Excluding Holidays

Allows users to connect directly with a Microix support technician for real-time remote assistance. Ideal for troubleshooting or walkthroughs that require screen sharing.

✉️ **Email Support**

Opens a direct channel to submit a support ticket via email. Users can describe their issue and receive follow-up from the Microix Support team.

📊 **Database Query**

Useful for administrators who need to analyze or troubleshoot data issues.

🎥 **Video Tutorial** (More videos are being added over time)

Gives access to training videos and step-by-step walkthroughs to help users learn features, processes, and best practices at their own pace.

Important: These training videos demonstrate general Microix features and functionality. They do not replace your organization's specific policies, procedures, configurations, or requirements.

Support Options You Access *Externally* (Not from within the Software)

Use this link: [Support]

Instant Access to:

Knowledge-Based Articles

[Workflow Modules Modern - Knowledge base]

Microix Videos

[Workflow Modules Modern - YouTube]

[Resources]

Please consult with your Organization Microix Administrator. A quote should be requested if you are new to Microix, need refresher training, or would benefit from a system review. Email sales@Microx.net to start your request.