

Simply Personnel Timesheets & Expenses

Setting Up Guide

Simply Personnel: Timesheets & Expenses

This document provides step-by-step guide for users to give an easy understanding on setting up the timesheets and expenses on your self service system.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

Logging into the System

The Self Service Module is accessed via a link which will then take you the login page, where you will be asked to enter your login details.

Login

UserName:	<input type="text" value="admin"/>	Book mark this page
Password:	<input type="password" value="•••••"/>	Forget me on this computer
Change Password:	<input type="checkbox"/>	
<input type="checkbox"/> Remember me on this computer	<input type="button" value="Login"/>	Forgot Password?

Enter the Administrators username and password. You can change your current password to something more memorable. To do this you must enter the current username and password and then tick the 'Change Password' option.

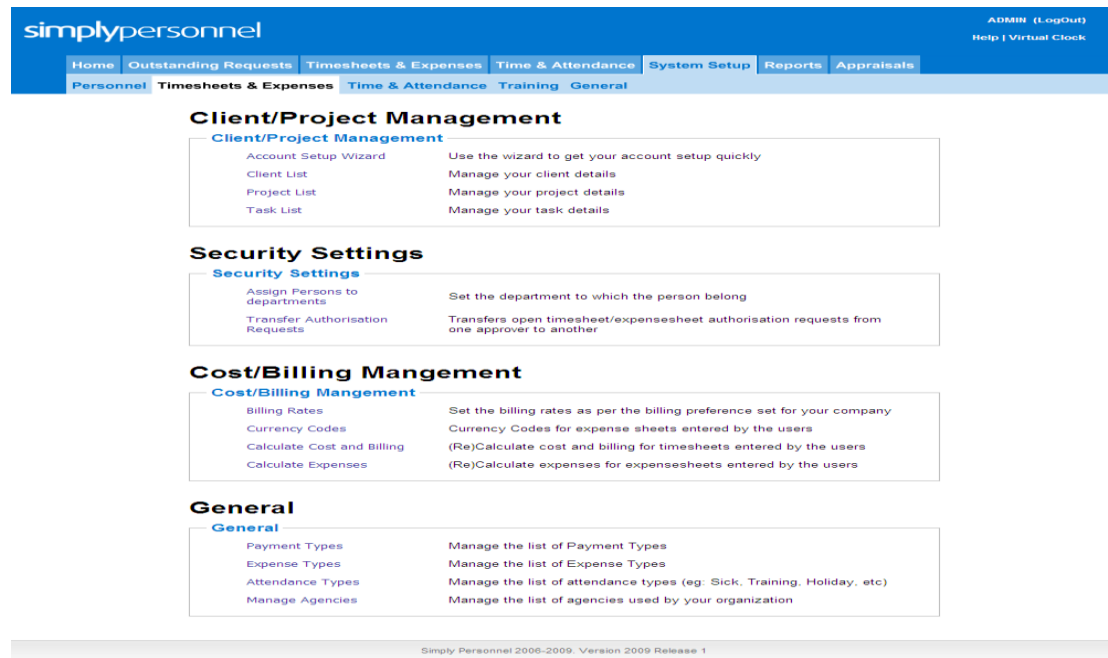
Login

UserName:	<input type="text" value="admin"/>	Book mark this page
Password:	<input type="password" value="•••••"/>	Forget me on this computer
Change Password:	<input checked="" type="checkbox"/>	
Password:	<input type="text"/>	
Confirm Password:	<input type="text"/>	
<input type="checkbox"/> Remember me on this computer	<input type="button" value="Login"/>	Forgot Password?

Once the box is ticked you will see two boxes, one for the new password and the second box to confirm the new password. Then Click 'Login' and this will save your new password and take you to the admin home page.

Once Logged in...

You will be greeted with the main administrator's dashboard, select system setup and the under the separate tab of timesheets & expenses.



The screenshot shows the main administrator dashboard. At the top, there is a navigation bar with the following tabs: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this, there is a sub-navigation bar with tabs: Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area is divided into several sections:

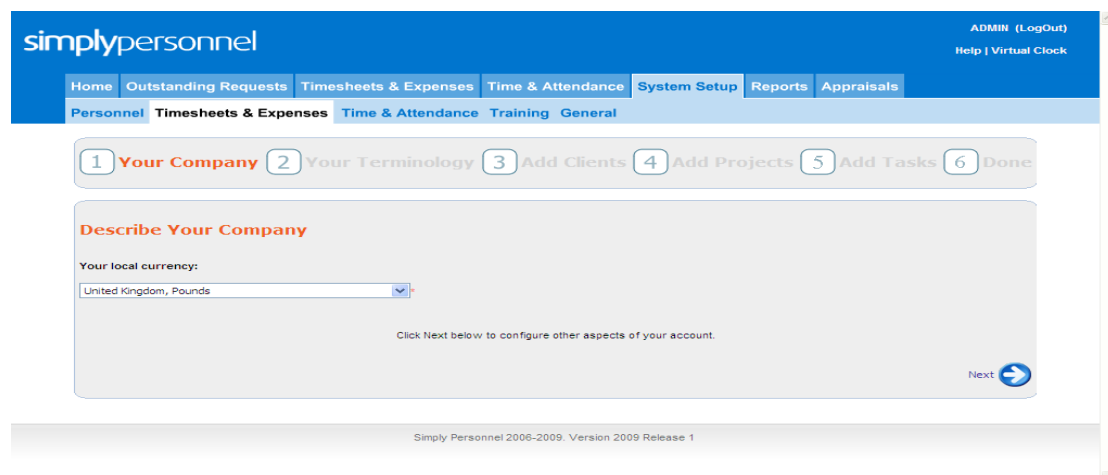
- Client/Project Management**
 - Client/Project Management**
 - Account Setup Wizard: Use the wizard to get your account setup quickly
 - Client List: Manage your client details
 - Project List: Manage your project details
 - Task List: Manage your task details
- Security Settings**
 - Security Settings**
 - Assign Persons to departments: Set the department to which the person belong
 - Transfer Authorisation Requests: Transfers open timesheet/expensesheet authorisation requests from one approver to another
- Cost/Billing Mangement**
 - Cost/Billing Mangement**
 - Billing Rates: Set the billing rates as per the billing preference set for your company
 - Currency Codes: Currency Codes for expense sheets entered by the users
 - Calculate Cost and billing: (Re)Calculate cost and billing for timesheets entered by the users
 - Calculate Expenses: (Re)Calculate expenses for expensesheets entered by the users
- General**
 - General**
 - Payment Types: Manage the list of Payment Types
 - Expense Types: Manage the list of Expense Types
 - Attendance Types: Manage the list of attendance types (eg: Sick, Training, Holiday, etc)
 - Manage Agencies: Manage the list of agencies used by your organization

At the bottom of the dashboard, there is a footer that reads: "Simply Personnel 2006-2009, Version 2009 Release 1".

Client/Project Management

Account set up wizard:

You have the option to run through the account setup wizard. The wizard is a great place to start.



The screenshot shows the account setup wizard. At the top, there is a navigation bar with the following tabs: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this, there is a sub-navigation bar with tabs: Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area is divided into several sections:

- 1 Your Company** (selected)
- 2 Your Terminology**
- 3 Add Clients**
- 4 Add Projects**
- 5 Add Tasks**
- 6 Done**

The current step is "Describe Your Company". It contains a form with the following fields:

- Your local currency: United Kingdom, Pounds (dropdown menu)

Below the form, there is a text box that reads: "Click Next below to configure other aspects of your account." and a "Next" button with a right-pointing arrow.

At the bottom of the wizard, there is a footer that reads: "Simply Personnel 2006-2009, Version 2009 Release 1".

The setup wizard guides you through setting up the essential information for your organization, the terminology you will use and the customers, projects and tasks. Once you have done this you are ready to start entering your first timesheet or configure the system to suit your organizations needs.

The account set up wizard takes you through your company parameters, your terminology, the customers you have, the projects you work on, the tasks you do on those projects – you can change all of these later.

Client List:

Search

Name:

Code:

Status: All

**Delete option is NOT available when there are related records present (like projects, timesheets, etc).
It is recommended to instead mark them as IN-ACTIVE in such cases, if required.*

Active	Name	Code	Accounting Code	Created Date	Last Updated Date	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>				
True	Client A	CA		26 May 2009 17:40:56		
True	Client B	CB		26 May 2009 17:40:56		
True	Client C	CC		26 May 2009 17:40:56		
True	Client D	CD		26 May 2009 17:40:56		
True	Client E	CE		26 May 2009 17:40:56		
True	test	test		20 May 2009 13:16:57		

[Back to System Setup](#)

Simply Personnel 2006-2009. Version 2009 Release 1

To create new customers/clients or change details about existing ones select the customer list option.

Add New Client
x

Name:*

Code:*

Accounting Code:

For each customer/client you can record:

Active – whether this customer is active and therefore should be shown whenever a customer selection is required, such as timesheet entry.

Name – the customers name

Code – an abbreviated code you may use for the customer

Accounting code – the account code of this customer on your accounting system.

Project List:

Search


Client: Name: Code: Status:

*Delete option is NOT available when there are related records present (like tasks, timesheets, etc).
It is recommended to instead mark them as **IN-ACTIVE** in such cases, if required.

Active	Billable	Client	Name	Code	Accounting Code	Created Date	Last Updated Date			
True	False	Client A	Project 1	P0001		26 May 2009 17:40:57				
True	False	Client A	Project 2	P0002		26 May 2009 17:40:57				
True	False	Client A	Project 3	P0003		26 May 2009 17:40:57				
True	False	Client A	Project 4	P0004		26 May 2009 17:40:57				
True	False	Client A	Project 5	P0005		26 May 2009 17:40:57				
True	False	test	Overtime	Overtime		20 May 2009 13:17:31				
True	False	test	Training	Training		20 May 2009 13:17:18				

[Back to System Setup](#)

The project list option is where you define all the projects that you can book time against.


Add New Project
✕

Is Billable:

Client:*

Name:*

Code:*

Accounting Code:

Budget Hours:

Project Manager:

Daily Rate:

Add
Cancel

For each project you can record the following information:

Active – whether this project is active and therefore should be shown whenever a project selection is required, such as timesheet entry.

Is Billable- A flag to specify if this project is billable or not

Client – the client this project is linked to

Name – the name of the project

Code – any specific code you would like to associate with this project

Accounting code – any accounting code that identifies this project within your accounting system

Budgeted Hours – the estimated number of hours it will take to complete this project.

Task List:

The task list option is where you define all the tasks that you can book time against.

Name: Status: All

**Delete option is NOT available when there are related records present (like projects, timesheets, etc). It is recommended to instead mark them as IN-ACTIVE in such cases, if required.*

>> [Show Details](#)

Active	Billable	Non Client/Task Specific	Name	Billing Rate	Accounting Code	Last Updated Date			
True	False	False	Task 1	0.00					
True	False	False	Task 2	0.00					
True	False	False	Task 3	0.00					
True	False	False	Task 4	0.00					
True	False	False	Task 5	0.00					
True	True	False	Test	100.00					
True	True	False	training	100.00					

[Back to System Setup](#)

Simply Personnel 2006-2009. Version 2009 Release 1

For each task you can record the following information:

Add New Task

Is Billable:

Non Client/Task Specific:
(eg: special tasks like ADMIN, MISC, etc)

Name:

Billing Rate:
 Override To Always Use This Rate

Accounting Code:

Impact On Flexi-Time:

Active – whether this task is active and therefore should be shown whenever a task selection is required, such as timesheet entry.

Is Billable- A flag to specify if this task is billable or not

Non Client/Task Specific – If this option is ticked then this task will only appear if the user selected Unallocated Client-Unallocated Project when entering time. You can specify if the Un-Allocated Client-Unallocated Project option should be shown within the timesheet entry screen by changing the option on the project list controls within company preferences.

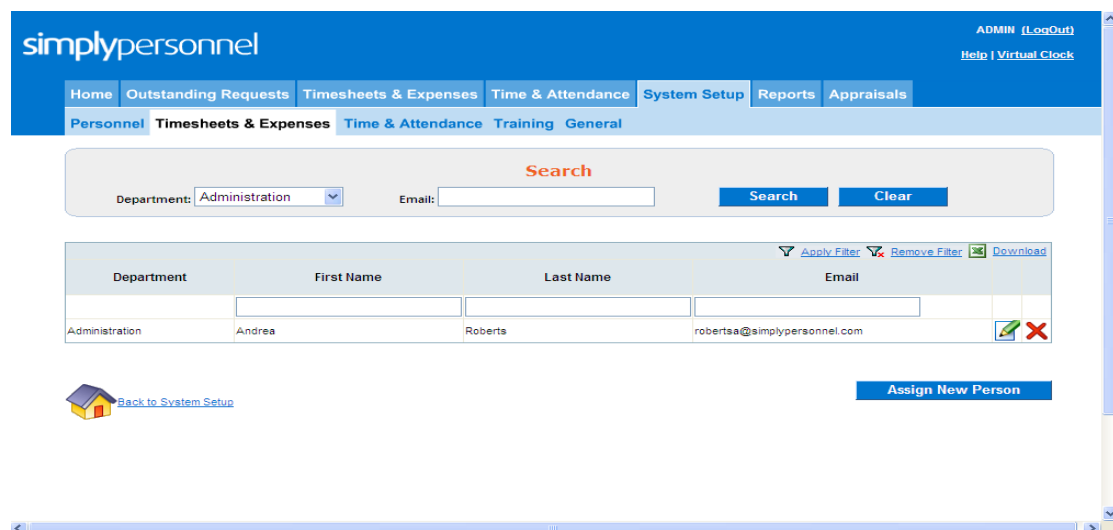
Name – the name of the task.

Billing Rate – the rate at which this task will be billed at. This is the default rate to use for this task – it may be overridden by the options you select within the billing. See the billing section for more information

Accounting code – a code which may relate this task to a posting within your accounts system


Security Settings:

Use the assign persons to department option to group your people into departments. To assign people into new departments click on the Assign New Person button, select the department you wish to assign people into and then select the people you want to assign.



The screenshot shows the 'simplypersonnel' web application interface. At the top, there is a navigation menu with options: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this, there is a sub-menu with options: Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area features a search bar with a 'Department' dropdown menu set to 'Administration' and an 'Email' input field. A 'Search' button and a 'Clear' button are also present. Below the search bar is a table with columns for Department, First Name, Last Name, and Email. The table contains one entry: Department: Administration, First Name: Andrea, Last Name: Roberts, Email: robertaa@simplypersonnel.com. There are 'Apply Filter', 'Remove Filter', and 'Download' buttons above the table. At the bottom of the table, there is a 'Back to System Setup' link and an 'Assign New Person' button.

Only those people you have not already assigned to other departments will be shown.


Assign persons to department
X

Department:

Select persons to Add:
Hold down CTRL key to select multiple persons

- Alison Ellison (ellisona@simplypersonnel.com)
- Andrea Roberts (robertsa@simplypersonnel.com)
- Andrew Spalding (spaldinga@simplypersonnel.com)
- Charles Abbey (abbeyc@simplypersonnel.com)
- Christine Agard (agardc@simplypersonnel.com)
- David Garner (garnerd@simplypersonnel.com)
- Frances Johnson (johnsonf@simplypersonnel.com)
- Gabriella Taylor (taylorg@simplypersonnel.com)
- James John (johnj@simplypersonnel.com)
- Jane Smith (smithh@simplypersonnel.com)

The persons shown above are the ones who are not yet assigned to any department. If the person you are looking for is not in the above list, then please remove the person from the respective department first, and then try to add to this new department. Alternatively you may edit the department of that person.

Assign
Cancel

To change the department a person is in, click on the edit (pencil) option next to the person and change the department.

Transfer Authorisation Request.

Transfers open timesheet/expenses sheet authorisation requests from one approver to another

simplypersonnel
ADMIN (LogOut)
Help | Virtual Clock

Home
Outstanding Requests
Timesheets & Expenses
Time & Attendance
System Setup
Reports
Appraisals

Personnel
Timesheets & Expenses
Time & Attendance
Training
General


This functionality will do the following:

- Update the appropriate user records to set the new approver as the timesheet/expensesheet approver
- Update the appropriate open timesheets/expensesheets to set the new approver.

Current Approver:

Transfer To Approver:

Confirm

 [Back to System Setup](#)

Simply Personnel 2006-2009. Version 2009 Release 1

Cost/Billing Management:

Billing Rates:

Choose this option if each employee is billed out on a flat rate, regardless of the client they are working for and regardless of the project or task. For example, John bills £30.00 per hour and Andy bills £100.00 per hour.

Department	First Name	Last Name	Email	Hourly Billing Rate	Daily Billing Rate		
	Alison	Elison	ellisona@simplypersonnel.com				
	Andrew	Spalding	spaldinga@simplypersonnel.com				
	Charles	Abbey	abbeyc@simplypersonnel.com				
	Christine	Agard	agardc@simplypersonnel.com				
	David	Garner	garnerd@simplypersonnel.com	100.00			
	Frances	Johnson	johnsonf@simplypersonnel.com				
	Gabriella	Taylor	taylorg@simplypersonnel.com				
	James	John	johnj@simplypersonnel.com				
	Jane	Smith	smithh@simplypersonnel.com	100.00			
	Janine	Bairstow	bairstowj@simplypersonnel.com				
	Jennifer	Yerson	yersonj@simplypersonnel.com				
	Karen	Klima	klimak@simplypersonnel.com				

You can edit the information by clicking on the green pencil.

Edit Billing Rate
✕

Email: garnerd@simplypersonnel.com

Hourly Billing Rate:

Daily Billing Rate:

Update
Cancel

Currency Codes:

Currency codes for expense sheets entered by the users.

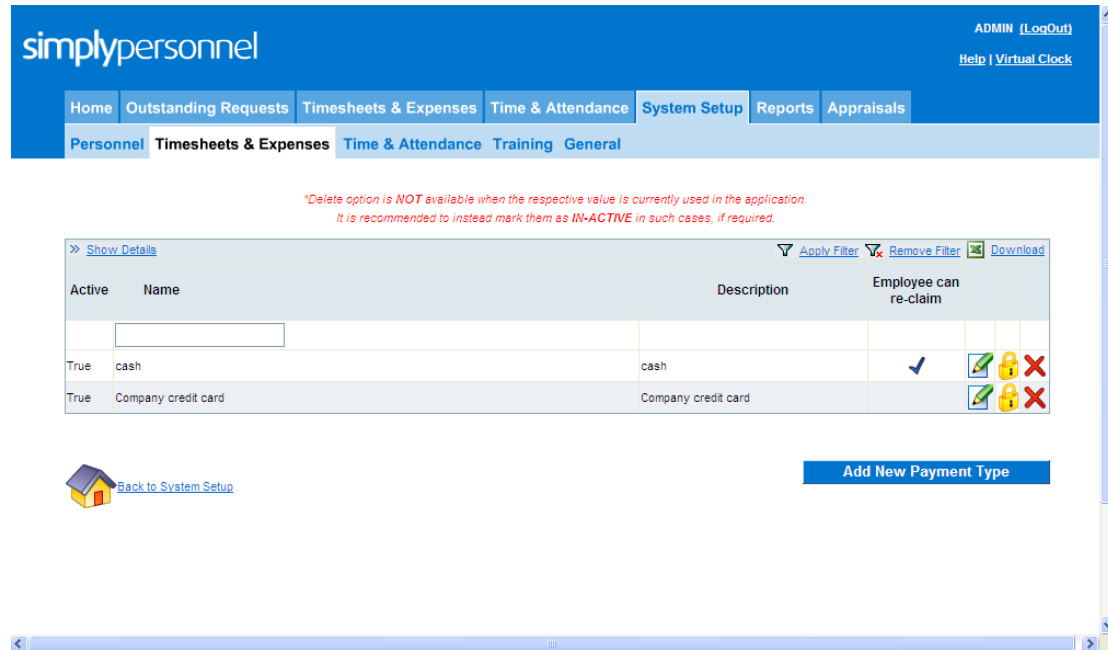
Calculate Cost & Billing:

Use the calculate cost and billing option to re-calculate the costs and billings for previously entered timesheets.

General:

Payment Types:

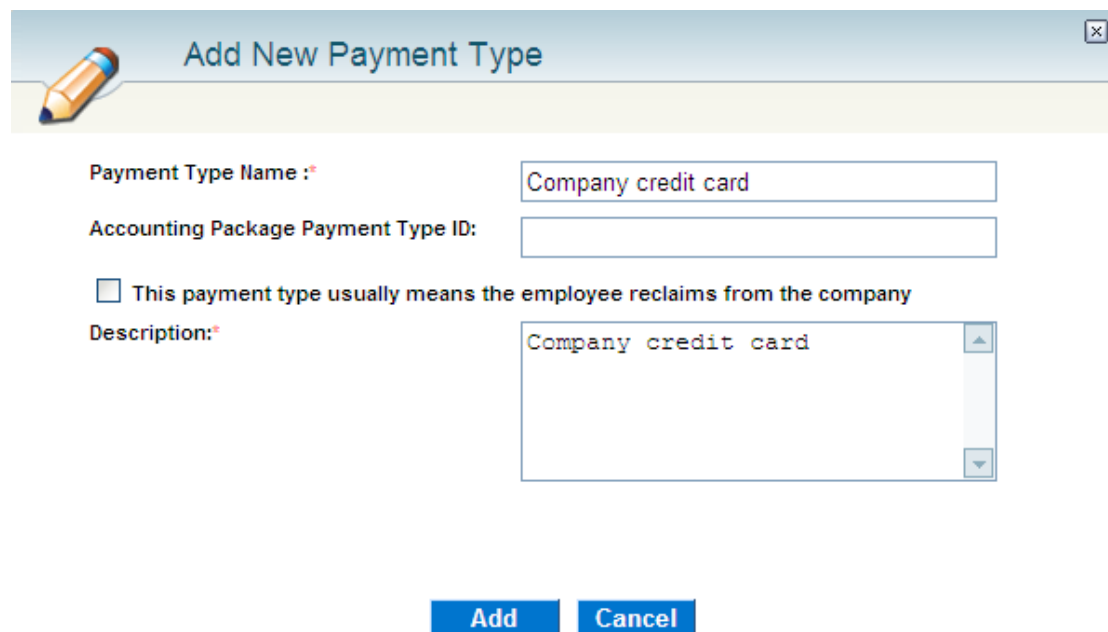
Enter your list of payments that can be selected when entering an expense sheet.



**Delete option is NOT available when the respective value is currently used in the application. It is recommended to instead mark them as IN-ACTIVE in such cases, if required.*

Active	Name	Description	Employee can re-claim
True	cash	cash	✓
True	Company credit card	Company credit card	

Click on add new payment type and decide weather it will be claimed back by the employee or not.



Add New Payment Type

Payment Type Name :*

Accounting Package Payment Type ID:

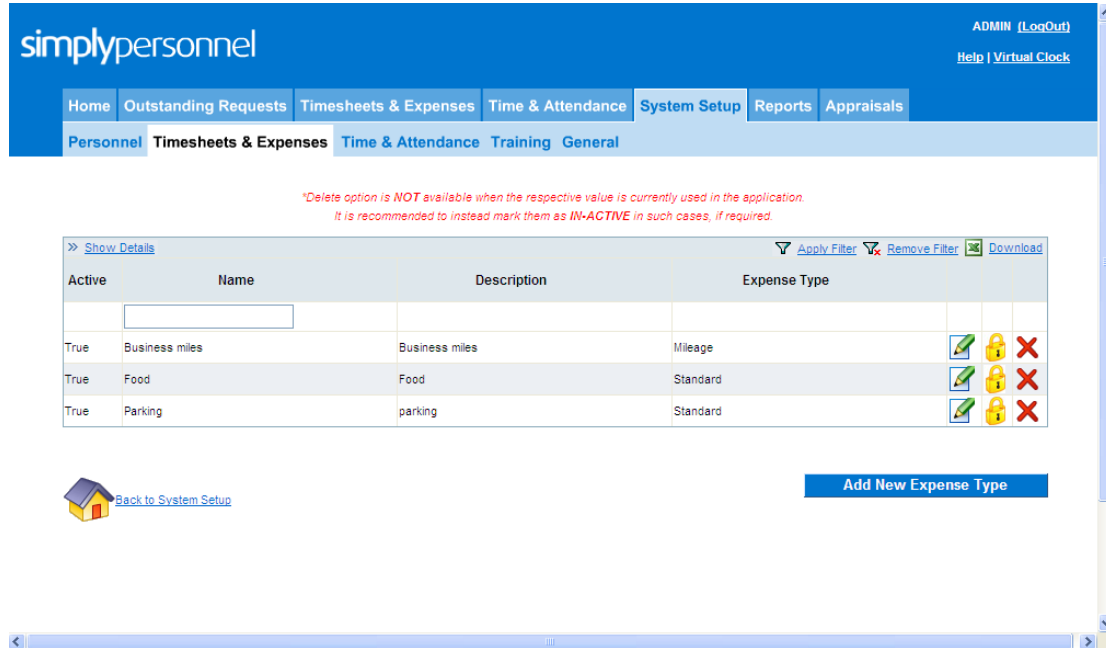
This payment type usually means the employee reclaims from the company

Description:*

Add **Cancel**

Expenses Type:

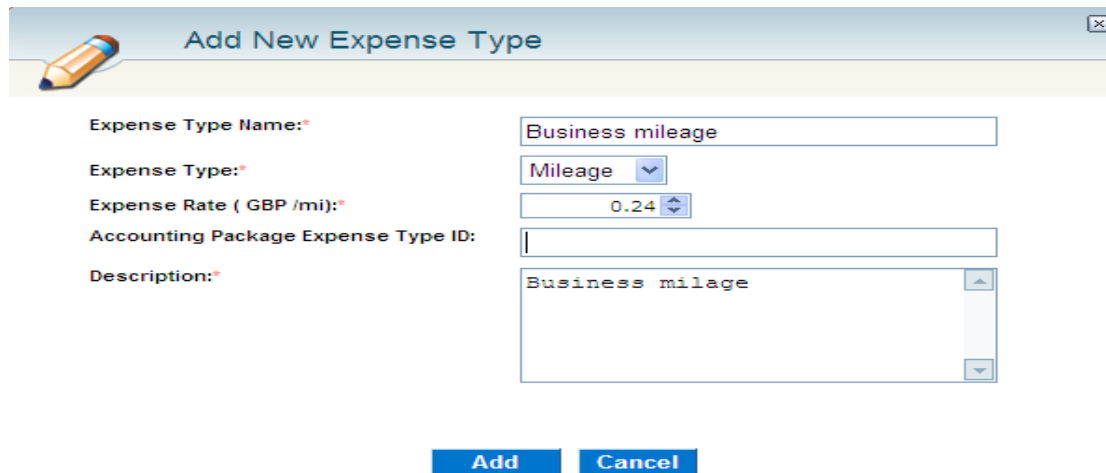
Enter a list of all of your expense types.



The screenshot shows the 'simplypersonnel' web application interface. The top navigation bar includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses', 'Time & Attendance', 'System Setup', 'Reports', and 'Appraisals'. The 'System Setup' menu is expanded to show 'Personnel', 'Timesheets & Expenses', 'Time & Attendance', 'Training', and 'General'. A red warning message states: "Delete option is NOT available when the respective value is currently used in the application. It is recommended to instead mark them as IN-ACTIVE in such cases, if required." Below this is a table with columns for 'Active', 'Name', 'Description', and 'Expense Type'. The table contains three rows: 'Business miles' (Mileage), 'Food' (Standard), and 'Parking' (Standard). Each row has edit, lock, and delete icons. A 'Back to System Setup' button and an 'Add New Expense Type' button are also visible.

Active	Name	Description	Expense Type			
True	Business miles	Business miles	Mileage			
True	Food	Food	Standard			
True	Parking	parking	Standard			

When entering an expense select whether it is a standard claim or mileage claim. If it is a mileage claim you can put how much per mile the expense will calculate.



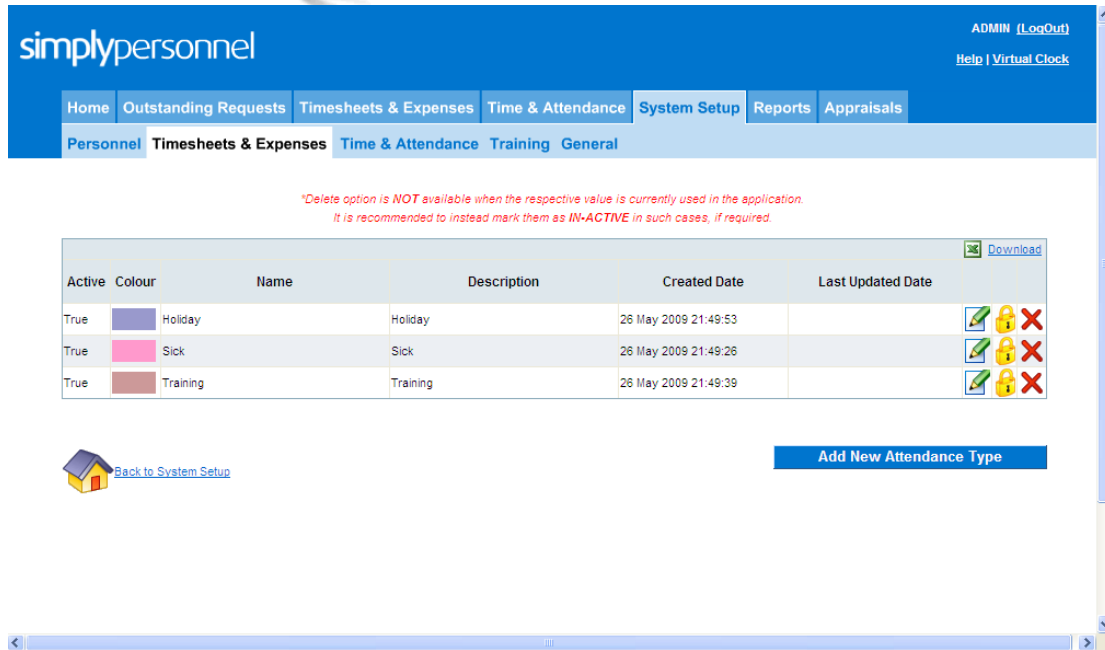
The screenshot shows the 'Add New Expense Type' form. It includes the following fields:

- Expense Type Name:** Business mileage
- Expense Type:** Mileage (dropdown menu)
- Expense Rate (GBP /mi):** 0.24 (spinners)
- Accounting Package Expense Type ID:** (empty text box)
- Description:** Business milage (text area)













At the bottom of the form are 'Add' and 'Cancel' buttons.

Attendance Types:

Use the attendance types option to create attendance tasks that can be entered onto the timesheet, these can typically be tasks like SICK, HOLIDAY, etc.

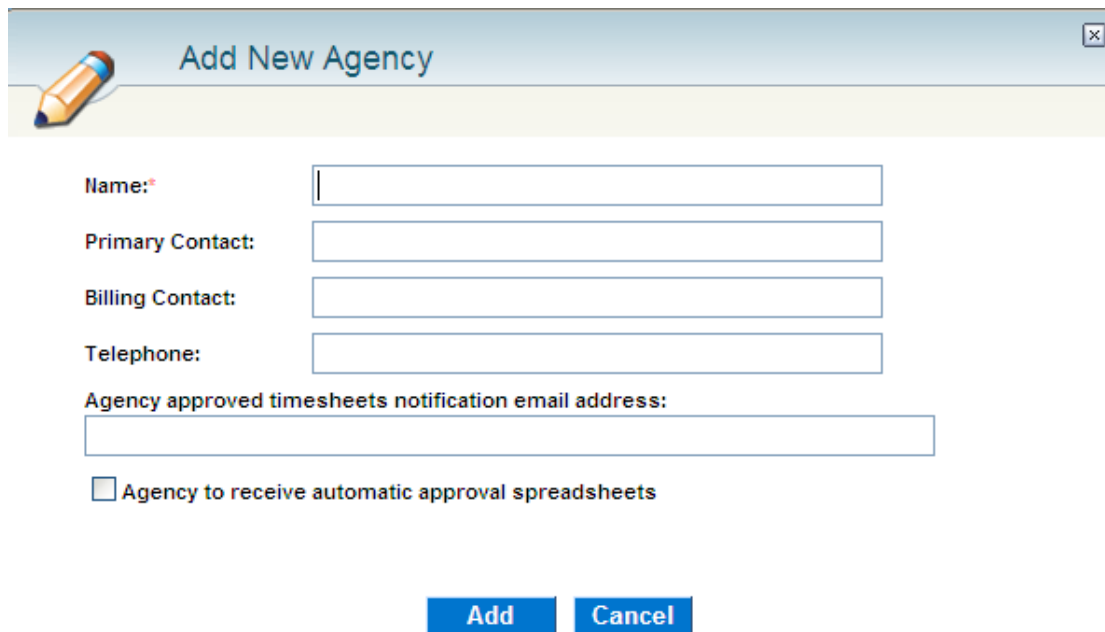


The screenshot shows the 'simplypersonnel' web application interface. At the top, there is a navigation menu with tabs for Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this, there is a sub-menu with tabs for Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area displays a table of attendance types with columns for Active, Colour, Name, Description, Created Date, and Last Updated Date. A red warning message is present above the table: **Delete option is NOT available when the respective value is currently used in the application. It is recommended to instead mark them as IN-ACTIVE in such cases, if required.* The table contains three rows: Holiday (purple), Sick (pink), and Training (brown). Each row has a 'Download' icon and three action icons (edit, lock, delete). Below the table, there is a 'Back to System Setup' link with a house icon and a blue 'Add New Attendance Type' button.

Active	Colour	Name	Description	Created Date	Last Updated Date	
True		Holiday	Holiday	26 May 2009 21:49:53		  
True		Sick	Sick	26 May 2009 21:49:26		  
True		Training	Training	26 May 2009 21:49:39		  

Manage Agencies:

Manage a list of agencies used by your organisation.



The screenshot shows the 'Add New Agency' form. It has a title bar with a pencil icon and a close button. The form contains several input fields: 'Name:*', 'Primary Contact:', 'Billing Contact:', 'Telephone:', and 'Agency approved timesheets notification email address:'. There is also a checkbox labeled 'Agency to receive automatic approval spreadsheets'. At the bottom, there are two blue buttons: 'Add' and 'Cancel'.

There are some extra setting for the Timesheets and expenses in the general tab> company preferences of the system setup.

simplypersonnel ADMIN (LogOut) Help | Virtual Clock

Home Outstanding Requests Timesheets & Expenses Time & Attendance System Setup Reports Appraisals

Personnel Timesheets & Expenses Time & Attendance Training **General**

Configuration

Configuration

- Company Preferences Company preferences.
- Configuration & Settings Configuration & Settings.

Select company preferences and then click on the arrows to open up the tab.

General Setting:

General Settings

Support Email Address

Local currency:

Use Timesheets247 for billing

Use Timesheets247 for expenses

Select the default local currency to be used in timesheets(for billing) and expenses.

Timesheets Information:

Timesheet Information

Time Increment:

Lock Date:

Mileage Unit:

Automatically send overdue timesheet reminders days after they are due

Select the Timesheet Model for your company:

Timesheet Model:

Week Starts On:

(If you currently have timesheets entered and are changing the week start date we suggest you take advice from us before doing this, please email support@timesheets247.com)

Expenses Information

Person to notify when expense sheet approved for payment:

CC Person to notify when expense sheet approved for payment:

Select project to bill when entering expenses?:

Select task when entering expenses?:

Allow entry of opening, closing and vechile registration?:

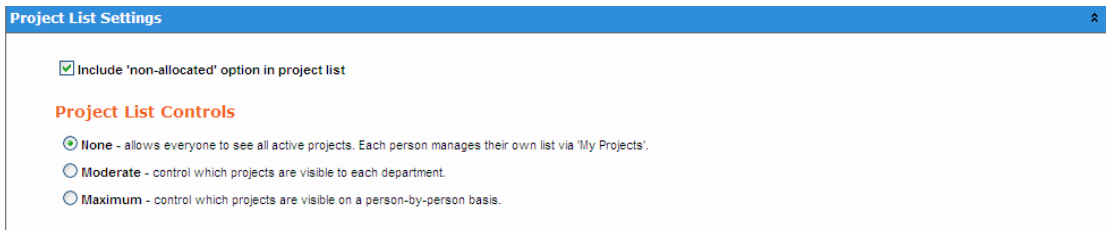
Label for notes box:

Allow currency rate to be adjusted?:

Use the timesheet and expenses information section to describe how your timesheets and expenses information will be recorded.

- Time increment set the fraction of time staff can enter time in, i.e. 15 minute segments, 30 minute segments or maybe 5 minute segments. Anything entered that does not meet the increment will be rounded up, to allow anytime to be entered leave the time increment as Not Set.
- Lock date stops timesheets from being edited before this date.
- Mileage unit – When using the optional expenses module the mileage unit specifies how you will record mileage, either miles or km for your organization
- Person to notify when expense sheets are approved is the email address of an existing user within Timesheets247 who will receive notification of an approved expense sheet
- Automatically send overdue reminders will cause Timesheets247 to remind all people whose timesheets are overdue. You can set the template of the email to suit your organization using the email templates option.
- Timesheet model is used to describe if your timesheets are weekly or monthly based. A weekly timesheet will allow a maximum of seven days to be entered whereas a monthly timesheet will allow up to 31 days to be entered.
- You can specify which day of the week your week starts on, for most organizations this will be Monday, but for some it may be Sunday. This will change the timesheet entry screen to show this as the first day of the week.

Project List Setting:



The screenshot shows a dialog box titled "Project List Settings". It contains a checked checkbox for "Include 'non-allocated' option in project list". Below this is a section titled "Project List Controls" with three radio button options: "None" (selected), "Moderate", and "Maximum".

The project list settings control how projects will be shown to users when they are entering timesheets, the follow options are available:

Include non-allocation option in project list – checking this option will allow the user to select “Unspecified Client, Unspecified Project” when entering time. Checking this option is usually combined with creating tasks that have the Non Customer/Task Specific option ticked. When “unspecified client/project” is selected by the user then the only tasks that have the Non Customer/Task Specific option ticked will be shown. Usually you will create these task for ADMIN, MISC, OTHER, NOT SETUP (this allows time to be logged against a customer/project which has not yet been set up by the administrator.

The project list controls section allows you to control how users can select projects to record time against.

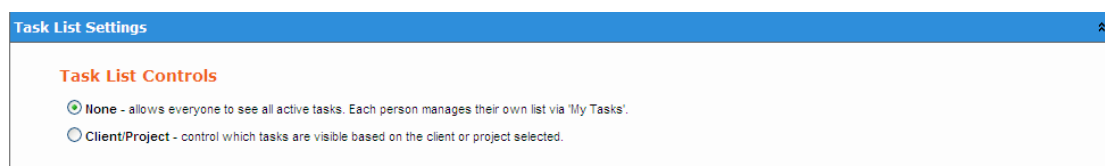
There are three options available:

None – which allows all projects to be seen by all users, users will have the option to determine which projects they want to see by using the My_Projects option.

Moderate – allows you to control which projects are visible to which departments. Selecting this option will show a new option Allowed Projects by Department on the control panel.

Maximum – allows projects to be controlled on a person by person basis. Selecting this option will show a new option 'Allowed Projects' by Person on the control panel.

Task List Setting:



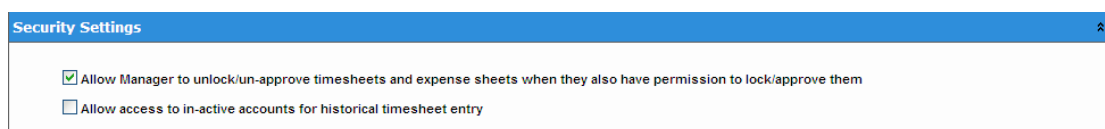
The screenshot shows a 'Task List Settings' window with a blue header. Below the header, the title 'Task List Controls' is displayed in orange. There are two radio button options: 'None' (selected) and 'Client/Project'. The 'None' option is described as allowing everyone to see all active tasks, with each person managing their own list via 'My Tasks'. The 'Client/Project' option is described as controlling which tasks are visible based on the client or project selected.

The task list controls section allows you to control how user can select task to record time against.

None – allows any user to select any task against any customer/project. Users can further restrict which tasks they want shown by using the My Tasks option.

Customer/Project – allows you to specify which tasks should be shown for particular projects. If this option is selected a new option called Allowed Tasks for Customer/Project will be shown on the control panel.

Security Setting:



The screenshot shows a 'Security Settings' window with a blue header. Below the header, there are two checkbox options. The first checkbox, 'Allow Manager to unlock/un-approve timesheets and expense sheets when they also have permission to lock/approve them', is checked. The second checkbox, 'Allow access to in-active accounts for historical timesheet entry', is unchecked.

Default User Setting:

Defaults for Users

These default values are used when adding new users, and can be customized for each user.

Time Format:

Date Format:

Cost Rate: GBP/hr

Label time as incomplete when less than hours per have been entered

Mon Tue Wed Thu Fri Sat Sun

The person must enter the start and end time for each time entry

Allow use of adjustment/break time field (for meal breaks, etc.)

Person must use stop watch to enter time

Do not allow the stopwatch to be restarted

The person must enter notes/comments with each time entry

Prevent person from submitting incomplete timesheets

The defaults for users allow you to specify what will be default values when you create a new user. Each user details can be fine tuned later through the user maintenance option by the administrator or manager or by the My Preferences option by the user themselves (although some of the details they can adjust are restricted).

Time format – The time format that will be used to enter any times

Date format – This users date format

Cost rate – The default cost for each person

Label time as incomplete – Allows you to control the minimum number of hours a day or week that must be entered before a timesheet can be submitted

The person must enter start and end times for each time entry – Ticking this will force the user to enter timesheets in daily mode, this then prompts the user for a start and end time for task.

Allow use of adjustment break time field – This will allow the user to enter time taken for a break

Person must use stop watch to enter time – This will stop the user from entering time and force them to record the start and stop time by clicking on a stop watch symbol This is ideal for super accurate time recording

Do not allow stop watches to be restarted – If stop watches are being used then ticking this option stops the time being re-entered

The person must enter comments with each time entry – Ticking this option will force the user to enter comments for each time entry they make

Prevent people from submitting incomplete time entry – Ticking this option will stop the user from submitting a timesheet that does not have the minimum numbers of hours per day or per week entered across all activities and non projects tasks such as holiday or sick.

Billing Rates:

Billing Rates

"Our billing rates depend on..."

No Billing

... which **Person** does the work.

... the **Project**.

... the **Task**.

... the **Task** and we make exceptions for certain projects.

... the **Task** and we make exceptions for certain people.

... the **Person** and we make exceptions for certain clients.

... the **Person** and we make exceptions for certain projects.

Default Rates

Based on your selection, what is a typical billing rate?

This is your "default" rate. You may set the actual rates for each item in the details pages for client, projects, tasks and people.

Billing within Timesheets is very flexible and very easy to setup – if you do not need to use the billing functionality within Timesheets247 then just select the No Billing option, otherwise select the billing option which corresponds to your organizations needs.

Terminology:

Terminology

How do you describe your work? Complete the sentence below using the pull-down menus.

Examples: An IT company may work on **tasks** of **projects** for their **customers**.
An advertising company may work on phases of a **job** for their **clients**.

Description	Singular term	Plural term
We do a	<input type="text" value="task"/>	<input type="text" value="tasks"/>
on a	<input type="text" value="project"/>	<input type="text" value="projects"/>
for a	<input type="text" value="client"/>	<input type="text" value="clients"/>
We group people into a	<input type="text" value="department"/>	<input type="text" value="departments"/>

The exact wording you use to describe customers, projects and tasks can be specified within Timesheets.

Essentially this means you can call customers, clients, companies, organizations or whatever fits your business. Projects can be called jobs, tasks can be called phases. Changing the terminology effects all the menu options and areas where that terminology is used, for example Customer List will change to Client List.

You can enter your own terminology or select from the predefined lists, you will need to specify the singular and plural definition for each word.



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