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.

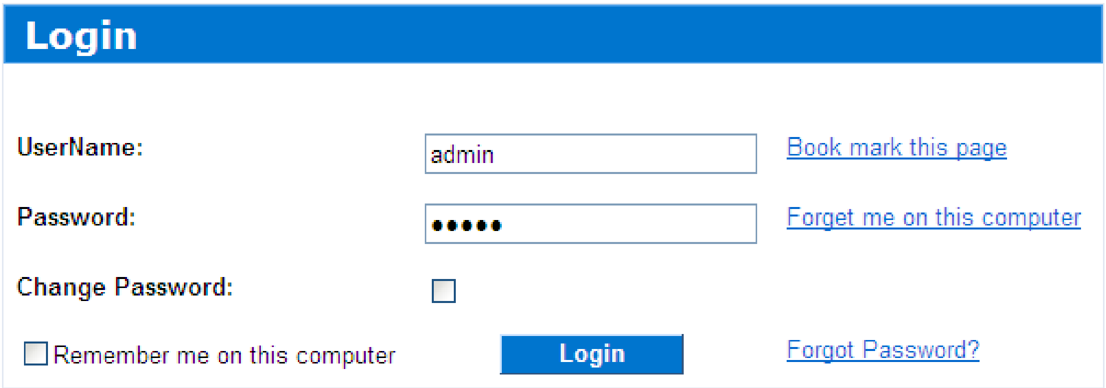
If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

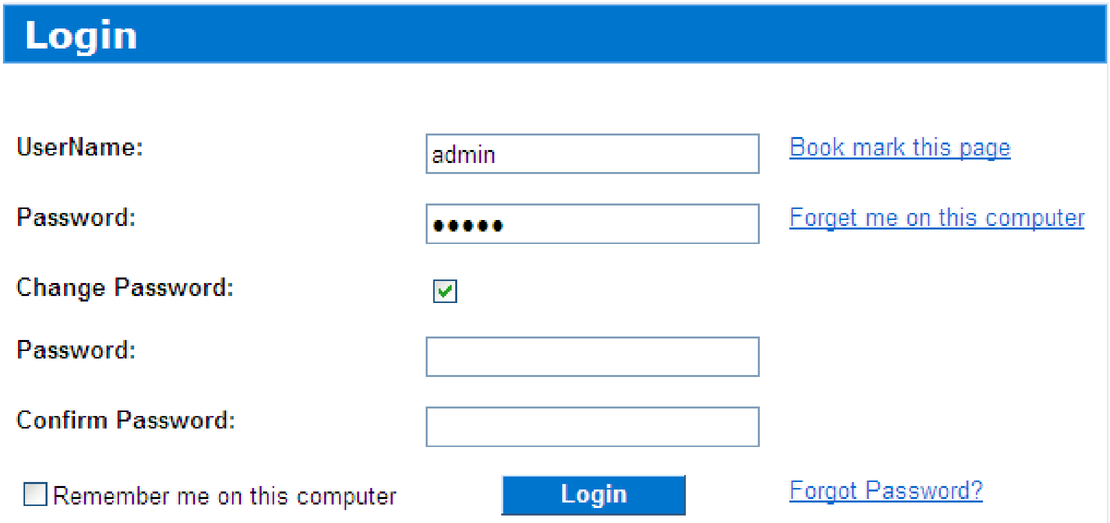
The Simply Personnel Team.

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.



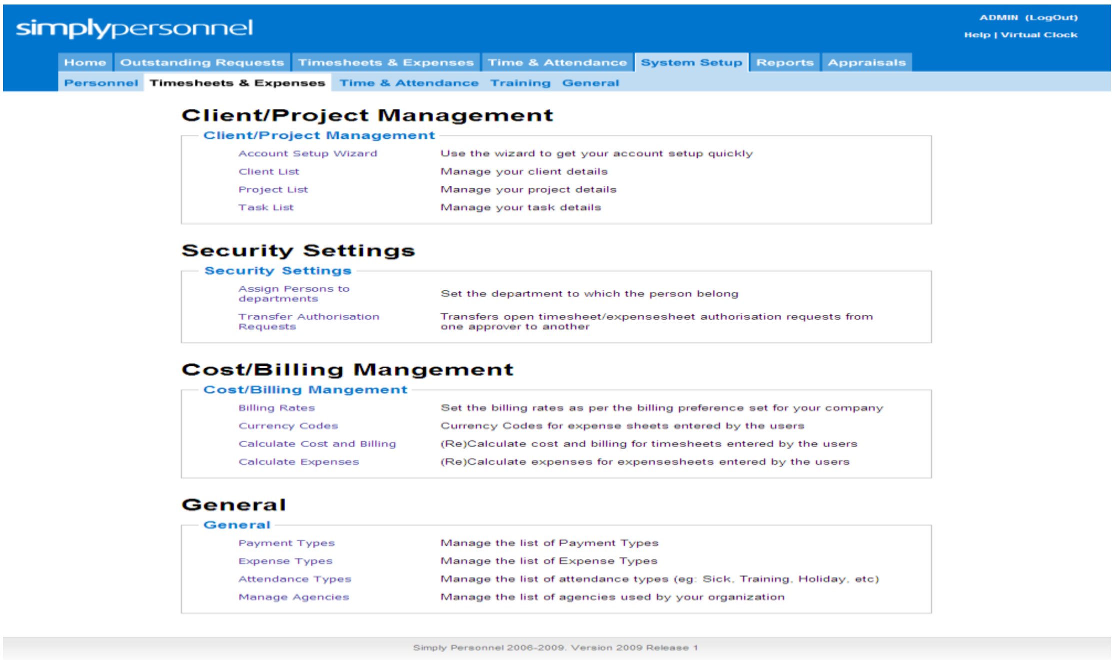
Enter the Administrators username and password. You can change your current password to something more memorable. To do this you must enter the current username and password and then tick the ‘Change Password’ option.



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…

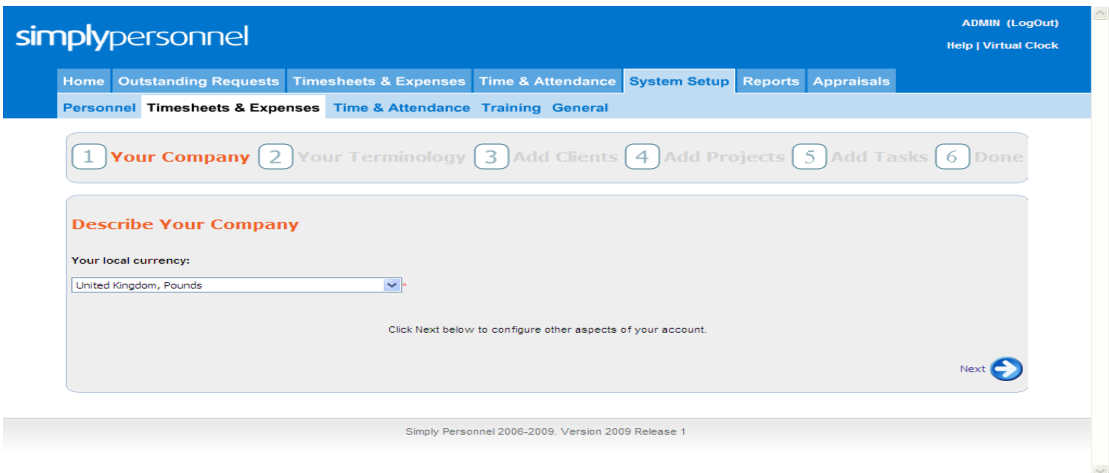
You will be greeted with the main administrator's dashboard, select system setup and the under the separate tab of timesheets & expenses.



Client/Project Management

Account set up wizard:

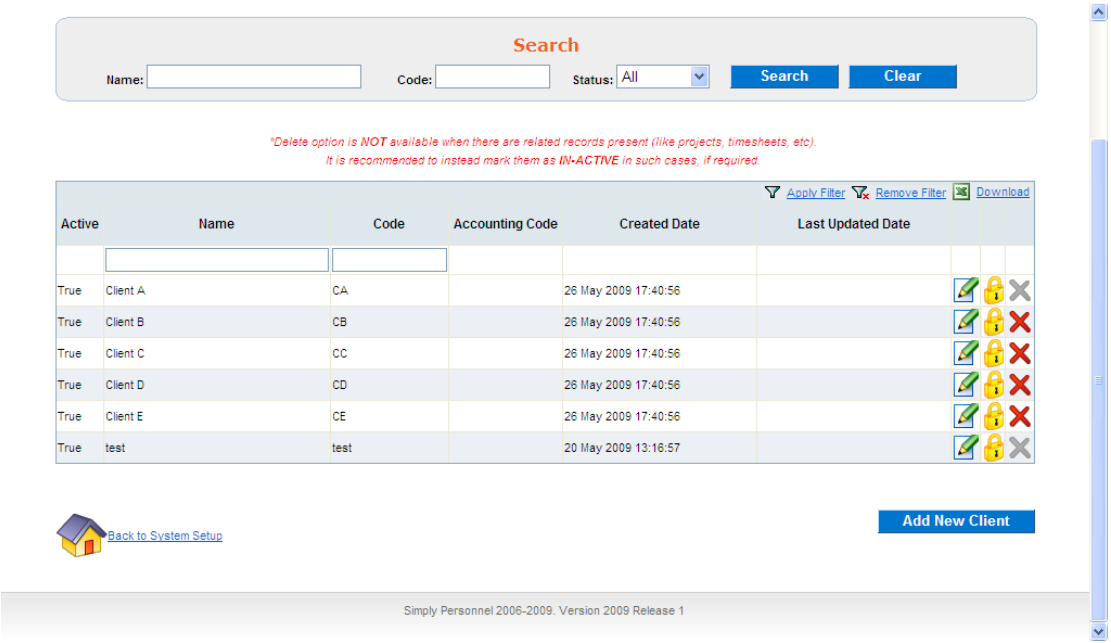
You have the option to run through the account setup wizard. The wizard is a great place to start.



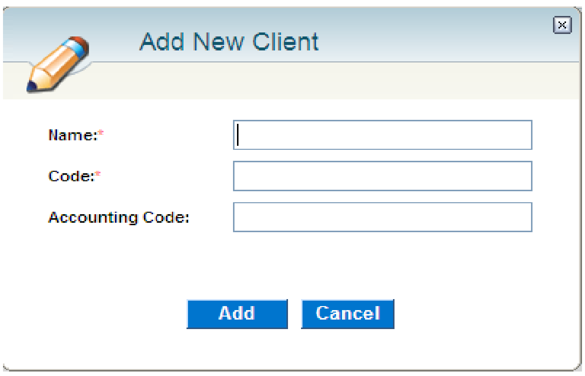
The setup wizard guides you through setting up the essential information for your organization, the terminology you will use and the customers, projects and tasks. Once you have done this you are ready to start entering your first timesheet or configure the system to suit your organizations needs.

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:



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



For each customer/client you can record:

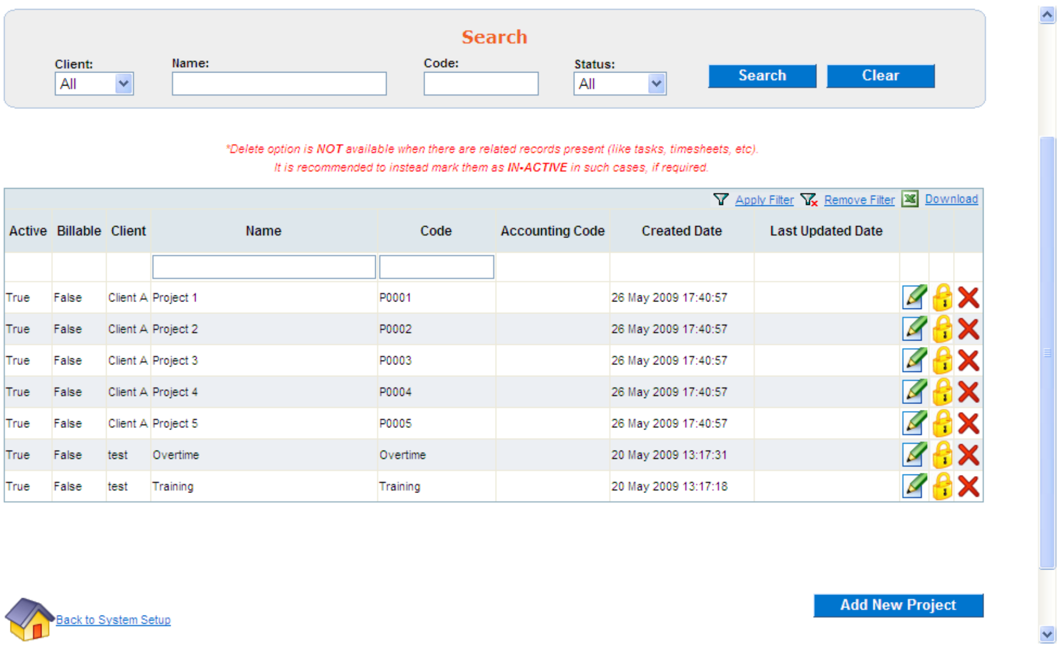
Active – whether this customer is active and therefore should be shown whenever a customer selection is required, such as timesheet entry.

Name – the customers name

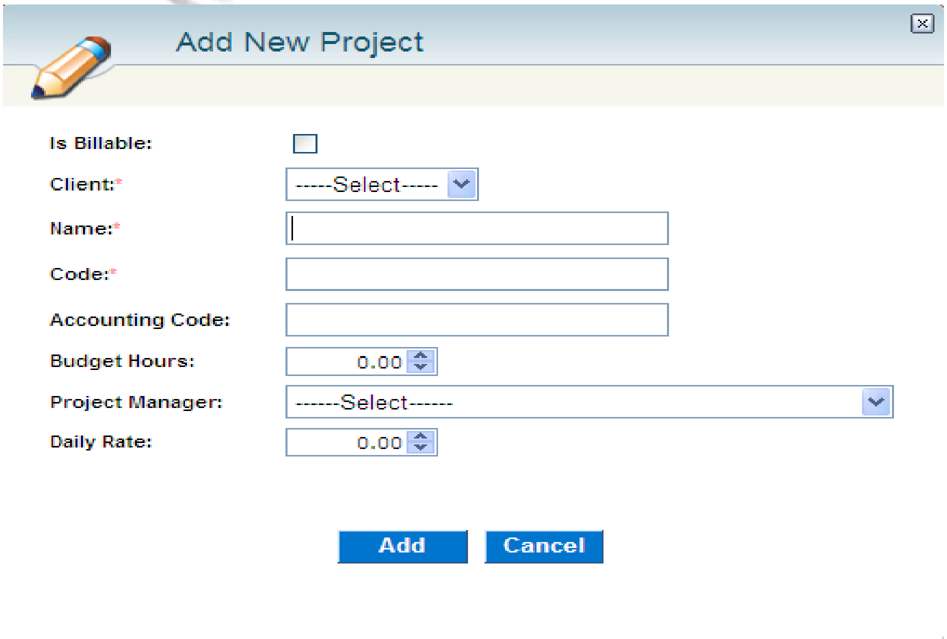
Code – an abbreviated code you may use for the customer

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

Project List:



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



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

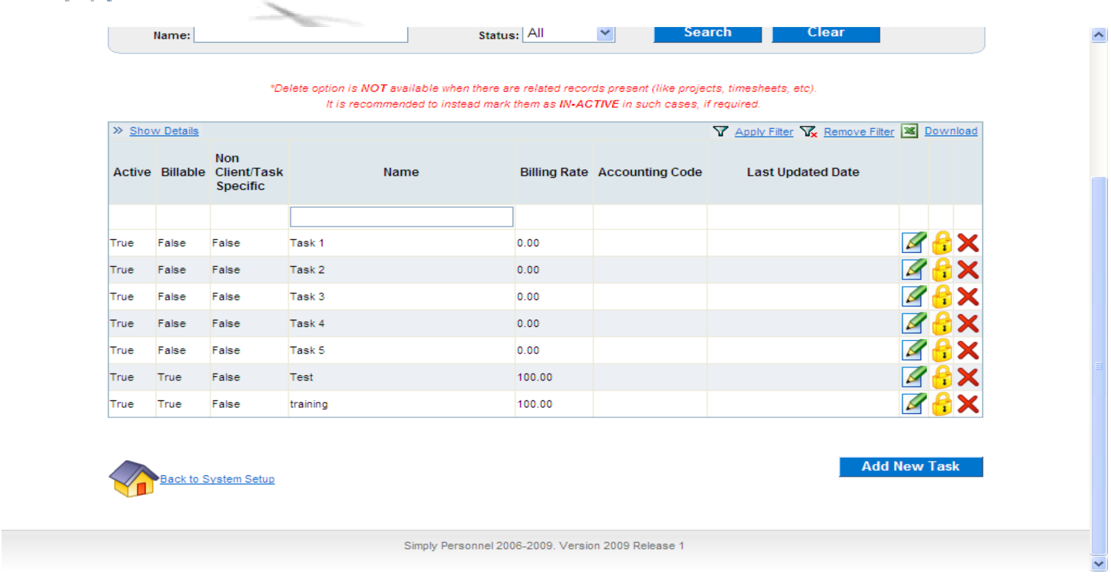
Code – any specific code you would like to associate with this project

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

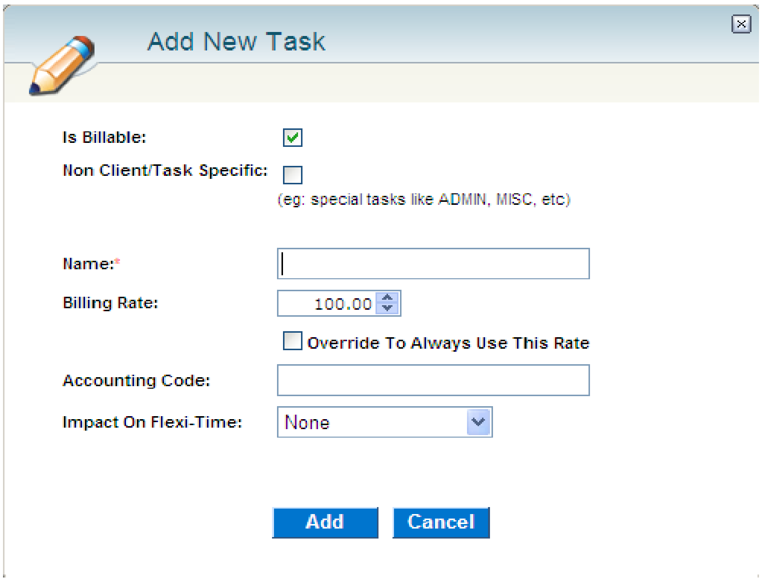
Budgeted Hours – the estimated number of hours it will take to complete this project.

Task List:

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



For each task you can record the following information:



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.

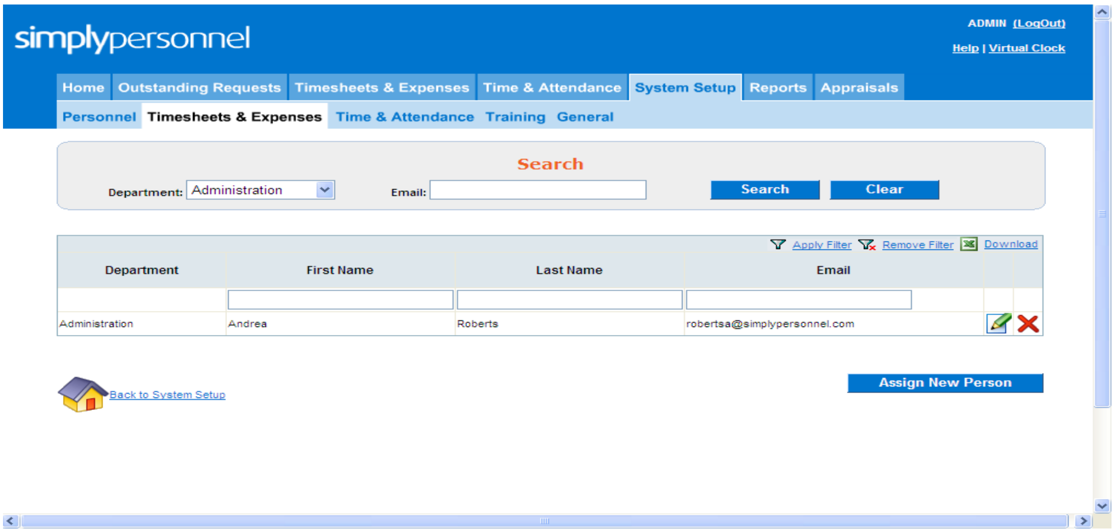
Billing Rate – the rate at which this task will be billed at. This is the default rate to use for this task – it may be overridden by the options you select within the billing. See the billing section for more information

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

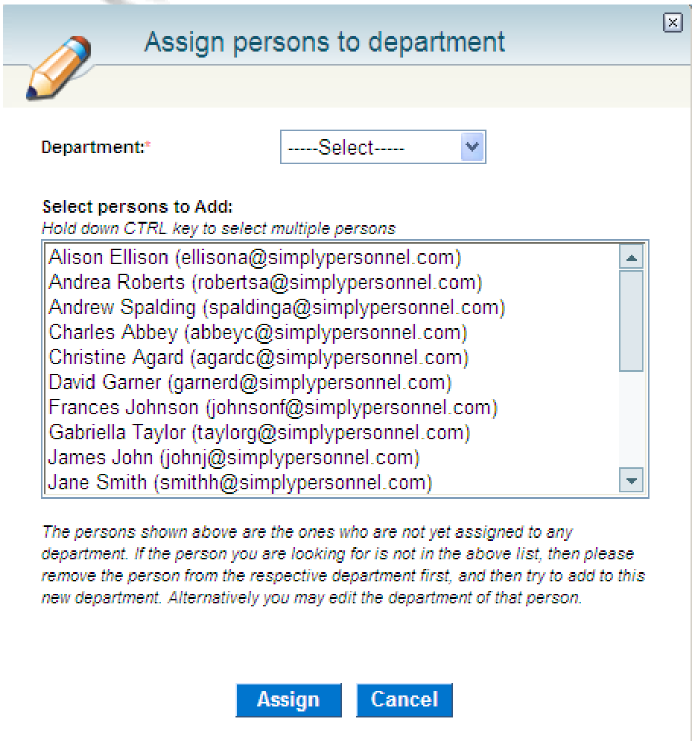
<u>Security Settings:</u>

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.



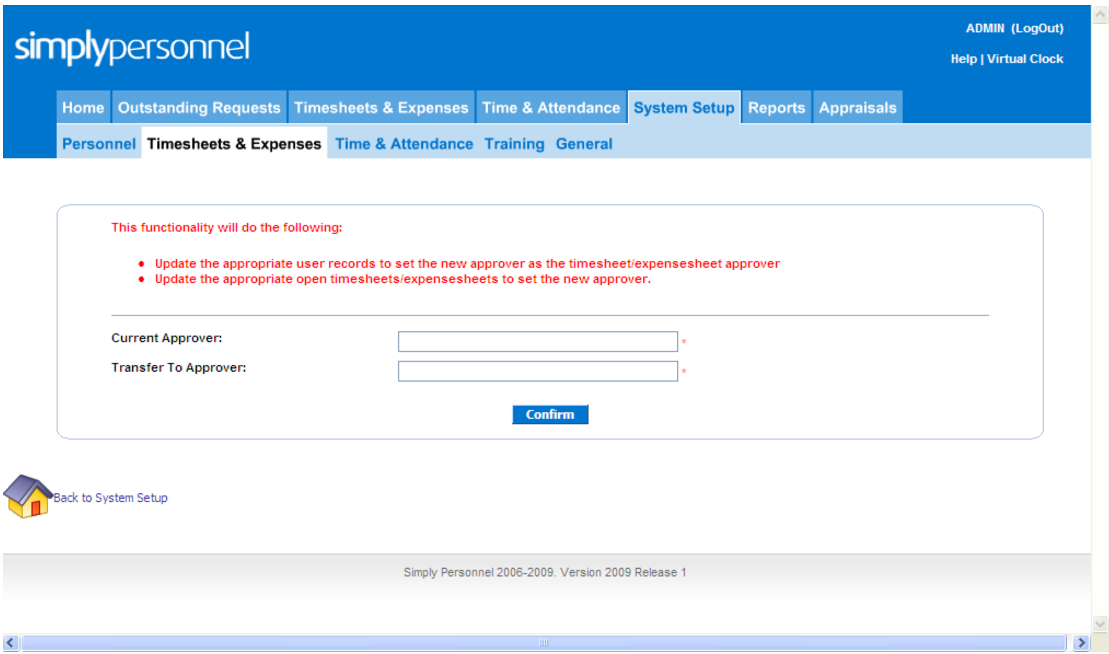
Only those people you have not already assigned to other departments will be shown.



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.

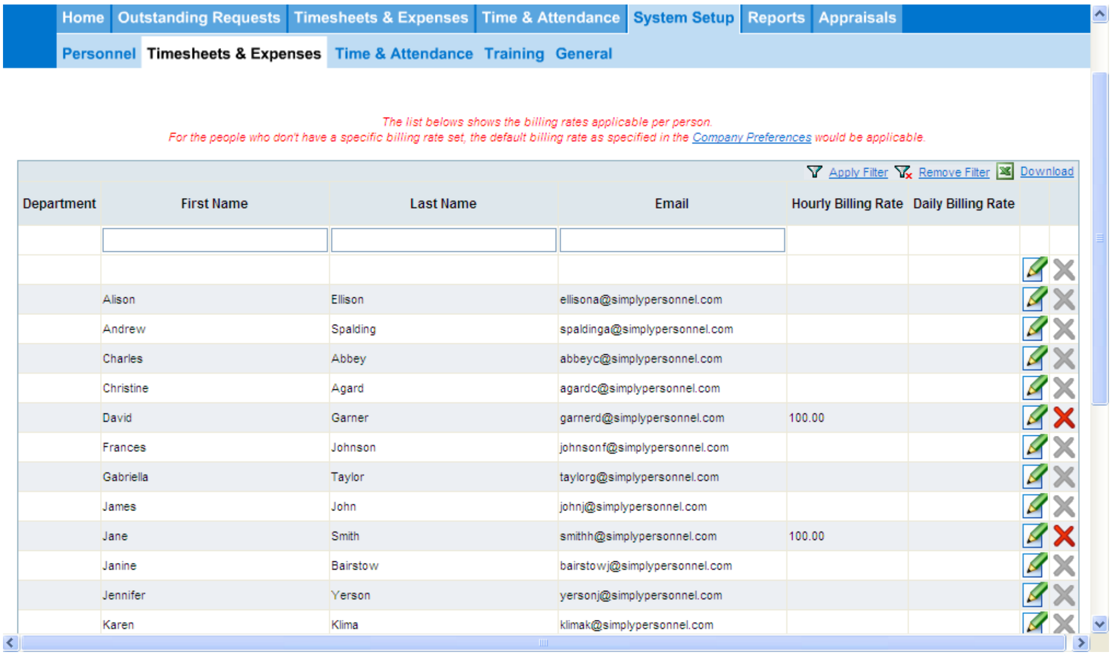
Transfers open timesheet/expenses sheet authorisation requests from one approver to another



Cost/Billing Management:

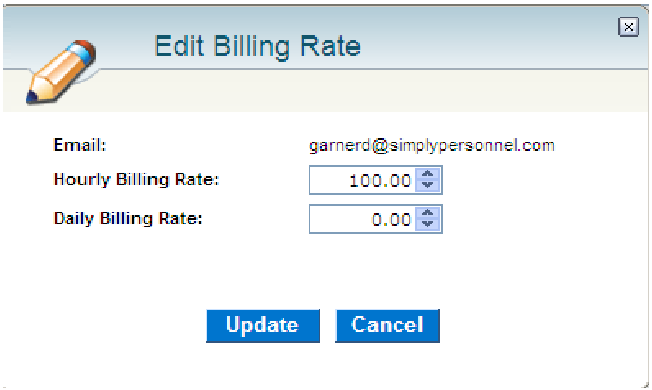
Billing Rates:

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	Ellison	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.



Currency Codes:

Currency codes for expense sheets entered by the users.

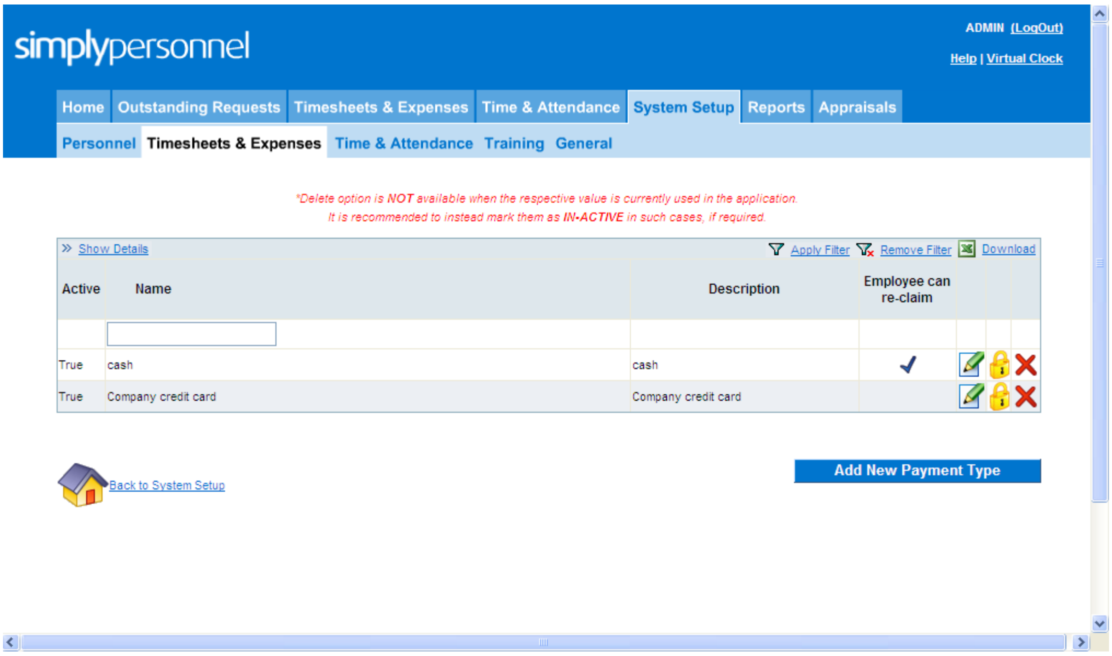
Calculate Cost & Billing:

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

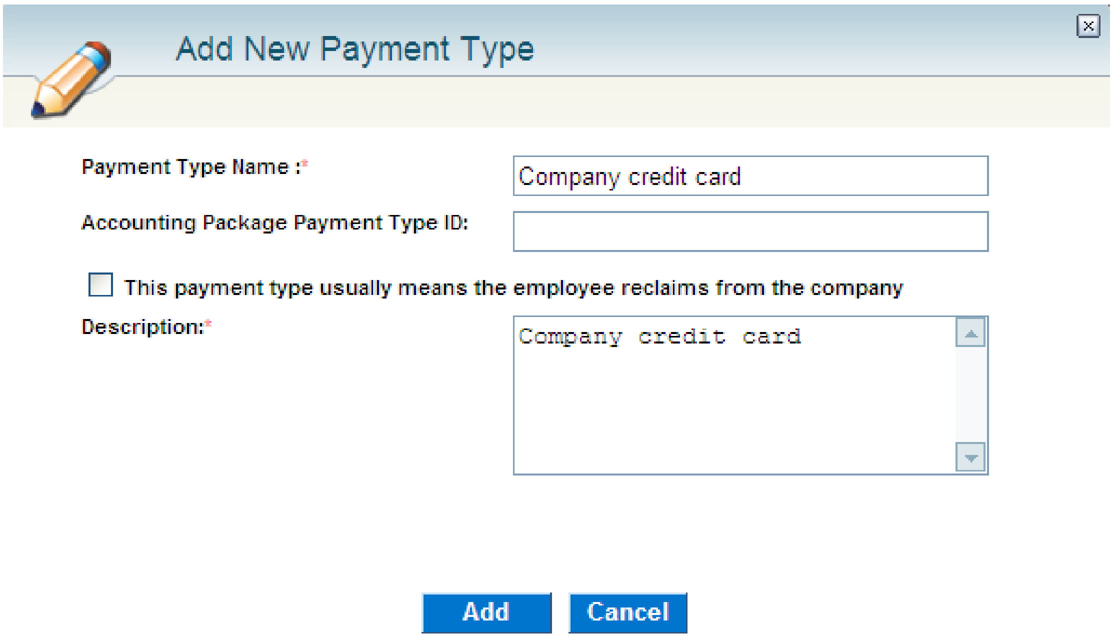
General:

Payment Types:

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

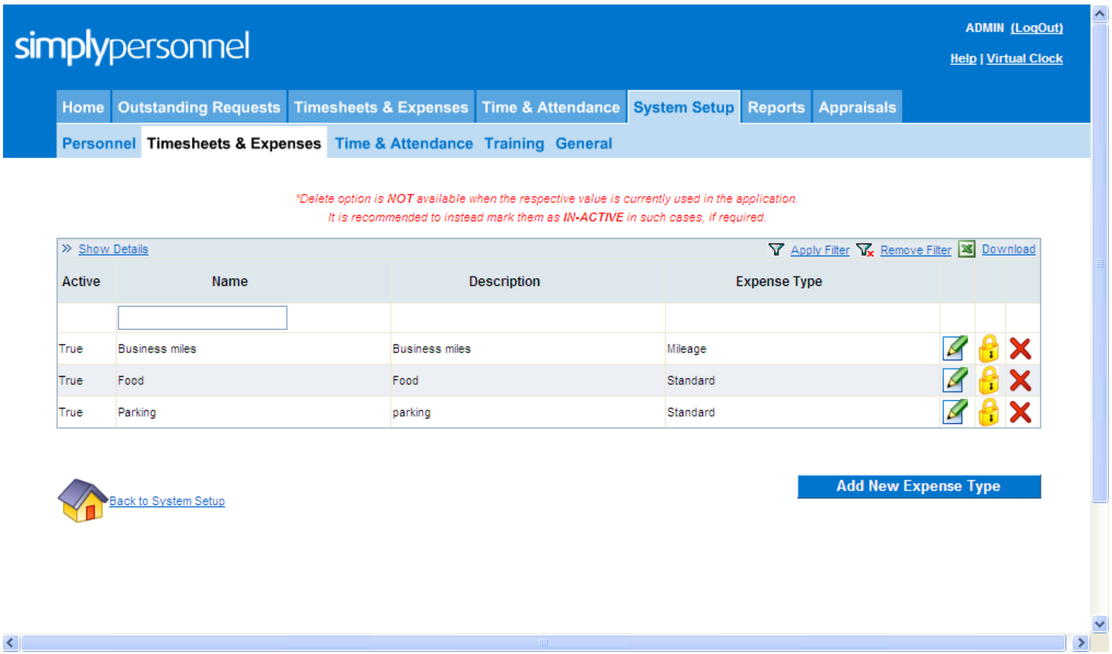


Click on add new payment type and decide weather it will be claimed back by the employee or not.

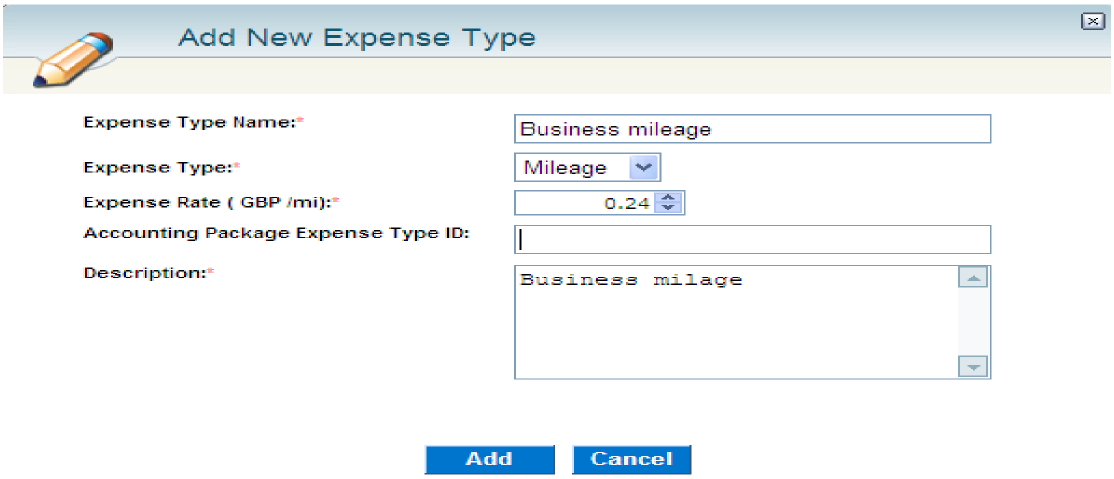


Expenses Type:

Enter a list of all of your expense types.

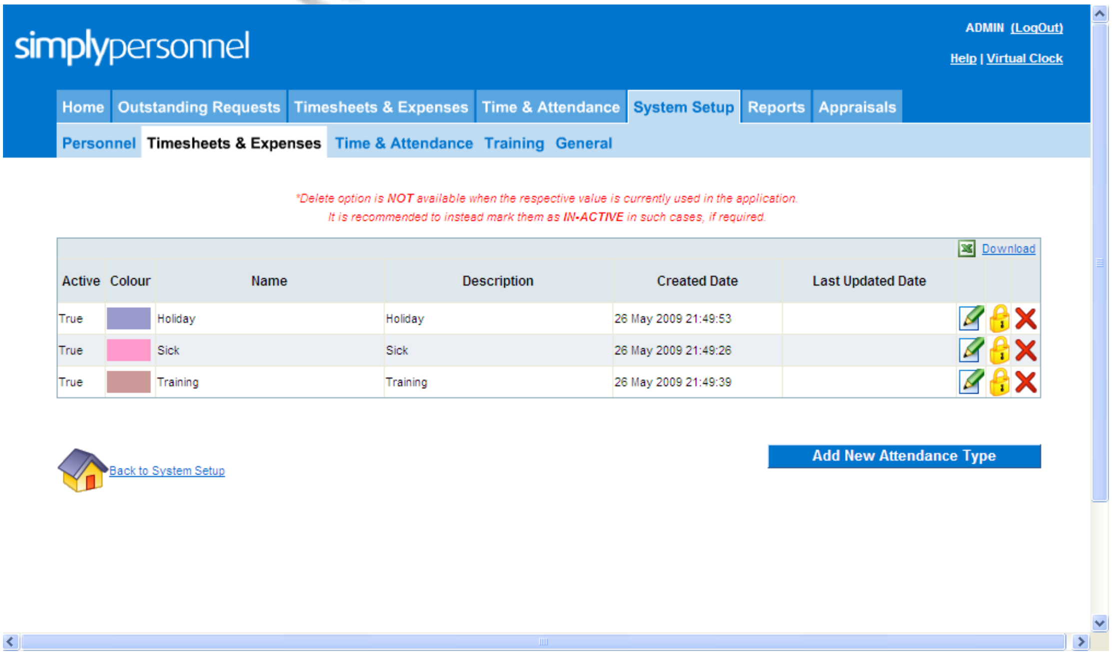


When entering an expense select whether it is a standard claim or mileage claim. If it is a mileage claim you can put how much per mile the expense will calculate.



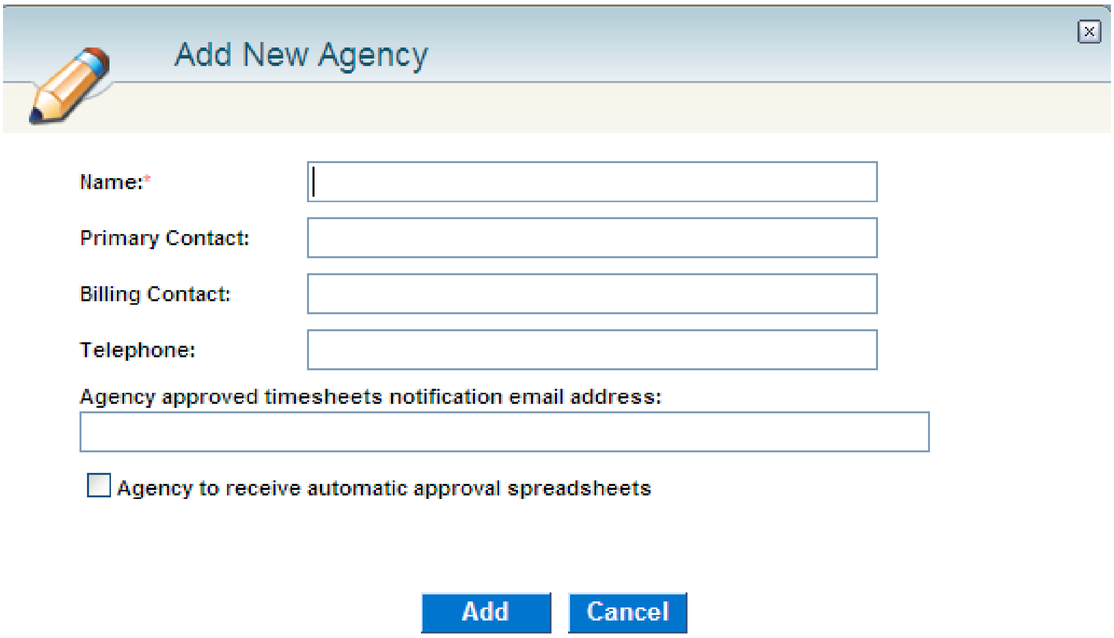
Attendance Types:

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.

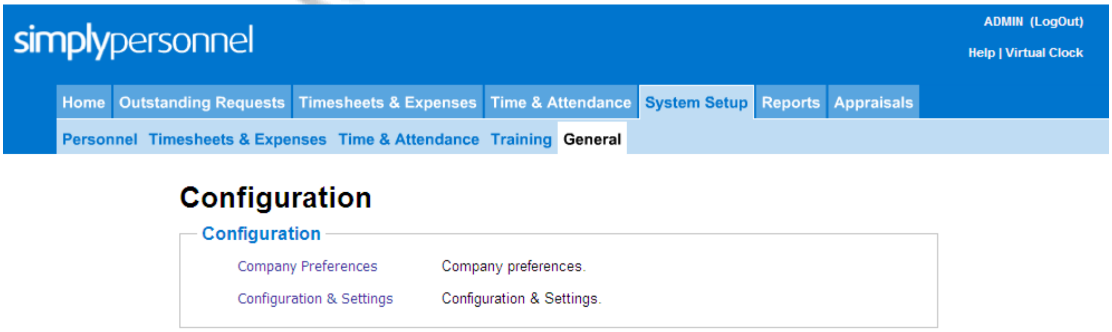


Manage Agencies:

Manage a list of agencies used by your organisation.

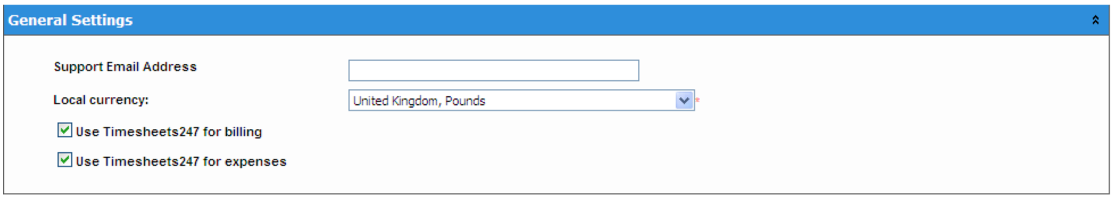


There are some extra setting for the Timesheets and expenses in the general tab> company preferences of the system setup.



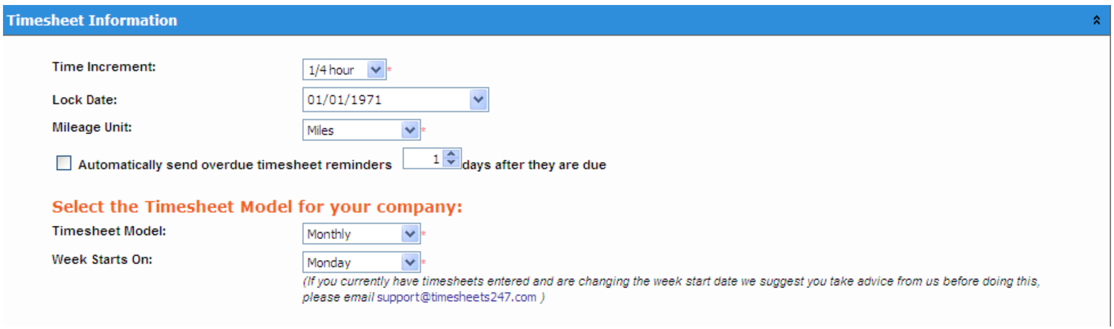
Select company preferences and then click on the arrows to open up the tab.

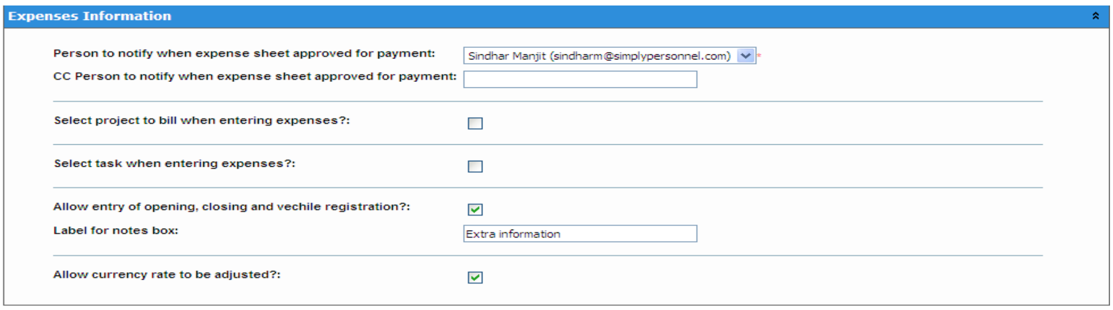
General Setting:



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

Timesheets Information:

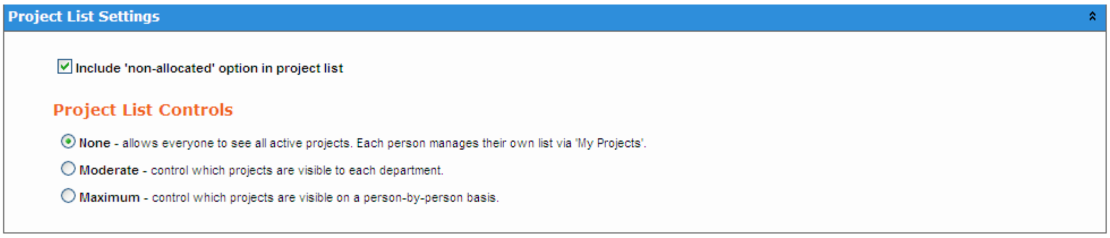




Use the timesheet and expenses information section to describe how your timesheets and expenses information will be recorded.

- 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 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.

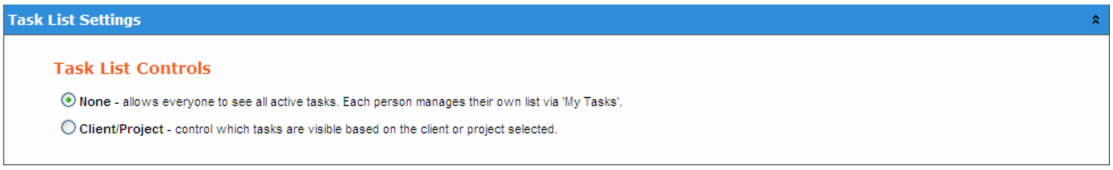
There are three options available:

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:

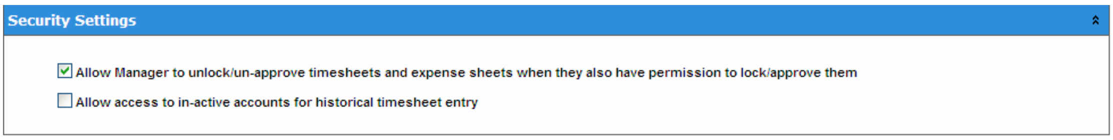


The task list controls section allows you to control how user can select task to record time against.

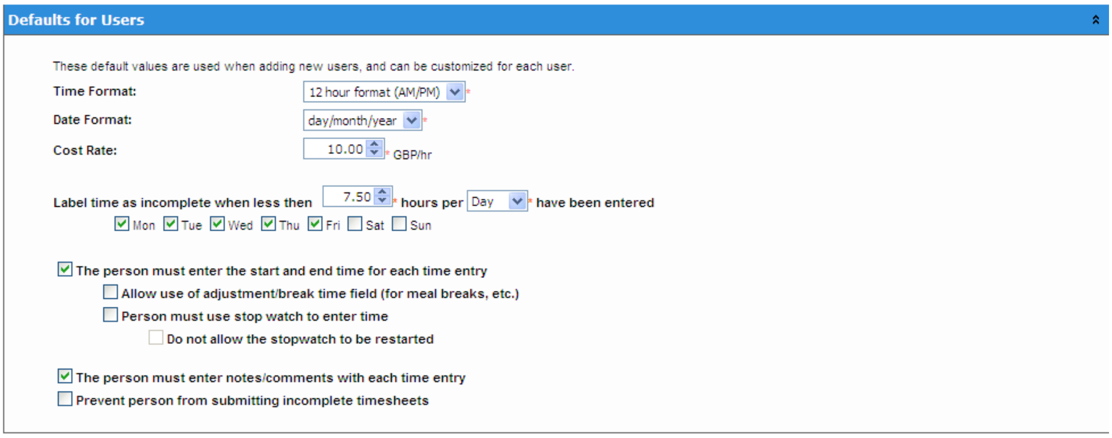
None – allows any user to select any task against any customer/project. Users can further restrict which tasks they want shown by using the My Tasks option.

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:



Default User Setting:



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

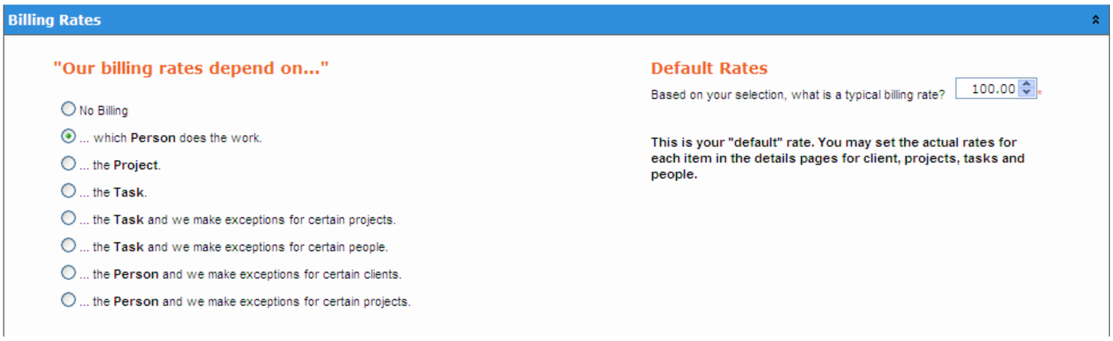
Person must use stop watch to enter time – This will stop the user from entering time and force them to record the start and stop time by clicking on a stop watch symbol This is ideal for super accurate time recording

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

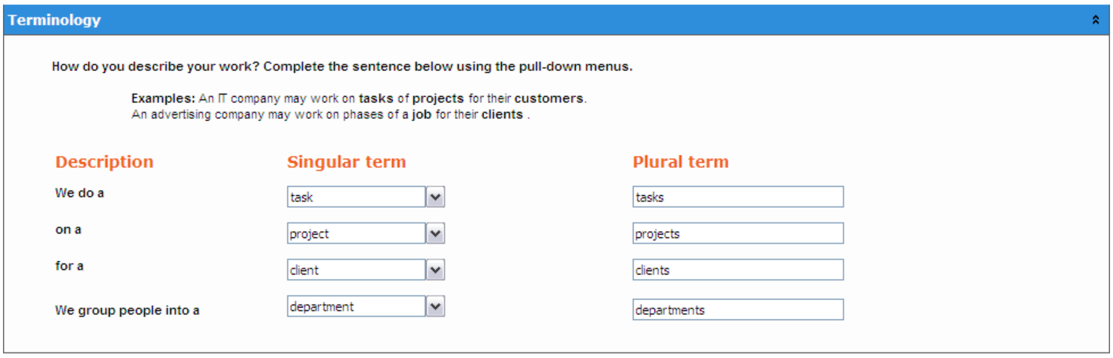
Prevent people from submitting incomplete time entry – Ticking this option will stop the user from submitting a timesheet that does not have the minimum numbers of hours per day or per week entered across all activities and non projects tasks such as holiday or sick.

Billing Rates:



Billing 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:



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.