



Timesheet Management Manual

Version 3.0

bijingo! *Informal.* (an exclamation used to emphasise the truth or importance of a foregoing statement, or to express astonishment, approval, etc.): *I know you can do it, bijingo!*

Timesheet Management Manual

Bijingo Pty Ltd
Melbourne, Victoria

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The example organisations, users and projects depicted herein are fictitious. No association with any real company, users or projects should be inferred.

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1. Timesheet Management & Approval System

The Timesheet Management & Approval System allows an organisation to implement a structured process where team members submit their timesheets to a timesheet approver, who must approve timesheets before they can be exported to an external system. If enabled, Bijingo uses a Structure as the basis to configure logical work flow hierarchies of team members, timesheet approvers and timesheet managers.

1.1 Timesheet Management Roles

A user can be assigned two roles which will allow them to perform both timesheet approval and management roles.

Timesheet Approver

A Timesheet Approver can view Team Member's timesheets and then approve or reject them. Once a timesheet has been approved, its details can be exported to an external system for billing or accounting information.

Timesheet Approvers are assigned roles at one or more positions within the Timesheet Structure which allows them to approve timesheets of team members at or below their position within the structure.

Timesheet Approvers are presented a summary of Approved, Submitted, Unsubmitted, In Progress and Not Started Timesheets on their home page. They can also go to the Timesheet Management Console by selecting the Timesheet icon on the Navigation Bar. From the centre, the Timesheet Approvers can select individual or a group of submitted timesheets and approve them. Once approved, timesheets can be exported to the financial system.

Timesheet Approvers can also reject timesheets. An immediate notification via email is sent to the user and the appropriate Timesheet Manager with a reason for the rejection. A timesheet, once approved can be reverted back to 'submitted for approval' status.

Timesheet Manager

A Timesheet Manager can also view team members' timesheets, but they cannot approve or reject them. Timesheet managers however, can enter times and submit timesheets on behalf of a Team Member.

Timesheet Managers are assigned roles at one or more positions within the Timesheet Structure which allows them to manage timesheets of team members at or below their position within the structure.

Timesheet Managers are presented a summary of Not Started, In Progress, Submitted for Approval and Rejected timesheets. They can also go to the Timesheet Management Centre by selecting the Timesheet icon on the Navigation Bar. From the Timesheet Management Centre, the Timesheet Manager can select, update and submit timesheets on behalf of their Team Members.

1.2 Timesheet Management & Approval Work Flow Example

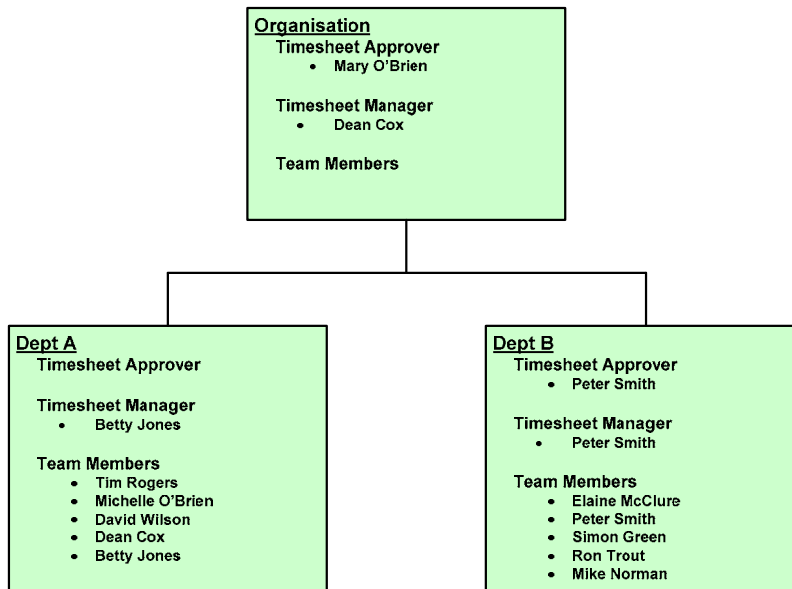


Figure 1: Example of the Timesheet Approval Workflow

The example above illustrates how an organisation may implement their timesheet approval system.

- Mary O'Brien has Timesheet Approval rights at the Organisation position. Mary can approve all submitted timesheets for all team members in the structure.
- Peter Smith is a timesheet approver for Dept B only. He can only approve timesheets which are submitted by Team Members in Dept B.
- Team Members in Dept A can only have their Timesheet approved by Mary
- Team members in Dept B can have their Timesheets approved by either Mary or Peter.
- Dean Cox has the authorisation to manage all Timesheets within the organisation.
- Betty Jones can only manage Dept A timesheets and Peter Smith can only manage Dept B timesheets.
- Team Members in Dept A can have their Timesheet managed by either Betty or Dean
- Team members in Dept B can have their Timesheets managed by either Dean or Peter.



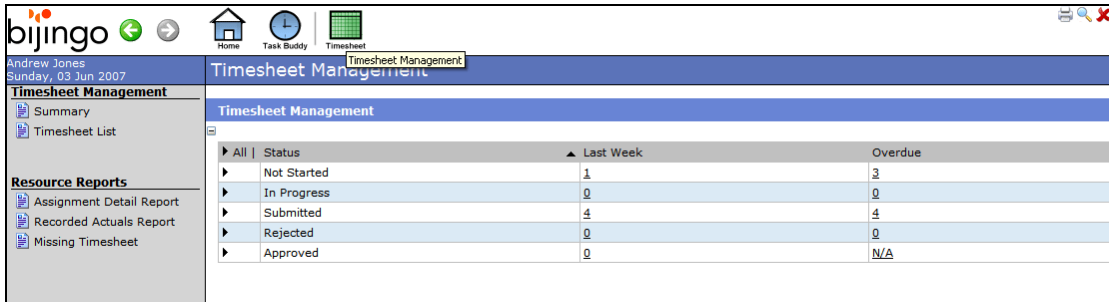
Note!

In the example above, Peter Smith is both the Approver and Manager of Timesheets in Dept B. Also in the example above, Mary O'Brien is not listed as a Team Member. Because she is not assigned as a Team Member within the structure, she will not be able to submit a timesheets for herself.

2. Timesheet Management Centre

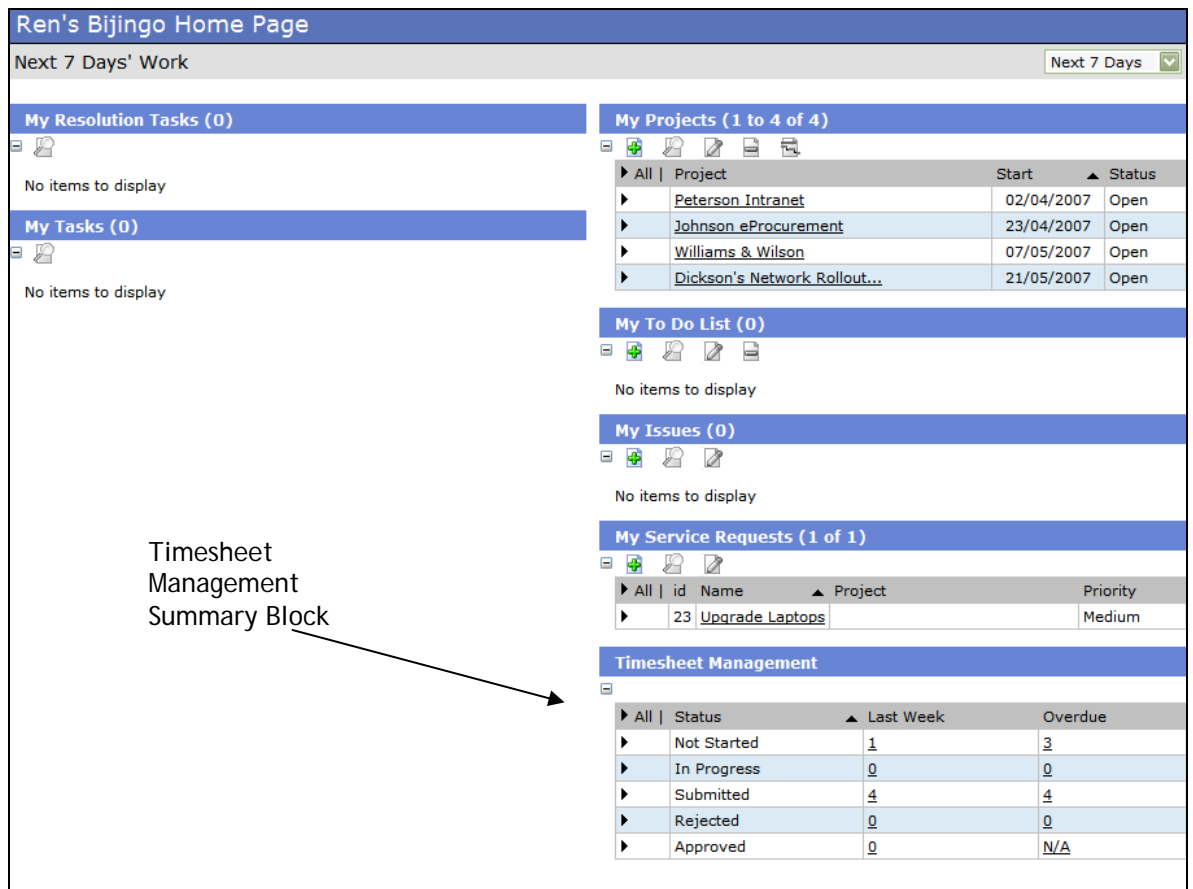
The Timesheet Management console is available to users who are assigned timesheet manager and approver roles in the Timesheet Management Structure. The Timesheet Management Centre contains a summary of the Timesheets for the Manager / Approver based on their rights.

It also contains a list of Resource Timesheets, which can be filtered based on pre-existing or conditional criteria and a number of reports which the Timesheet Manager can access that are relevant to the Timesheet Manager and Approver Role.



2.1 Timesheet Management Summary

Timesheet Managers and Approvers will have Timesheet Management Summary displayed in the Timesheet Management Centre and on their Homepage. This summary will give the user a quick overview to the current status of the timesheets they are authorised to manage or approve.



Links to Filtered Timesheet List

Click on the one links in the Timesheet Management Summary to open filtered Timesheet List. For example, clicking on the Overdue Submitted For Approval Link will open the Timesheet List with all overdue submitted timesheets.

Switchover Day

The Switchover Day setting allows Timesheet Approvers to focus on last weeks timesheets for a set period of time. This leeway should give the Approver enough time to process last weeks timesheets before having to focus on the current week. This view will Switchover to the current week on a given day as specified in the Application Settings. This setting is controlled by the administrator and should be set to one or two days after the timesheet submission date.

2.2 Timesheet List

The Timesheet List displays all team members timesheets that a Timesheet Approver or Manager has authorisation to approve or manage. Alter the list display by modifying the duration, status or resource structure based filters.

The screenshot shows the 'Timesheet Management' interface. At the top, there are filters for 'User' (set to 'All'), 'Week Starting' (21/08/2006 to 27/08/2006), and 'Status' (set to 'Not Submitted'). Below the filters, a table displays 16 timesheet records. The table has columns: Member, Week Starting, Hours, Status, Date Submitted, Submitted By, Date Approved, and Approved By. The record for 'Sam Miller' is highlighted in red, indicating it is 'Not Started' with 0.00 hours. At the bottom, there is a search bar and navigation buttons like 'Next >' and 'Last <-'.

Member	Week Starting	Hours	Status	Date Submitted	Submitted By	Date Approved	Approved By
Ron Walker	21/08/2006	60	In Progress	21/08/2006 16:32:04	Ron Walker		
Anna Brown	21/08/2006	0.00	Not Started				
Betty Windsor	21/08/2006	40	In Progress	22/08/2006 19:52:43	Betty Windsor		
Cathy Ingles	21/08/2006	32	In Progress	22/08/2006 19:53:15	Cathy Ingles		
Enzo Waterman	21/08/2006	32	In Progress	22/08/2006 10:54:54	Ron Walker		
Craig Pope	21/08/2006	0.00	Not Started				
Rita Adams	21/08/2006	32	In Progress	22/08/2006 19:53:59	Rita Adams		
Rob Cousins	21/08/2006	0.00	Not Started				
Sam Miller	21/08/2006	0.00	Not Started				
Sue Carter	21/08/2006	0.00	Not Started				
Tim Black	21/08/2006	0.00	Not Started				
Tina French	21/08/2006	0.00	Not Started				
Ulla Fontane	21/08/2006	0.00	Not Started				
Zac Miles	21/08/2006	0.00	Not Started				
Michael Little	21/08/2006	16	In Progress	17/08/2006 13:55:09	Michael Little		







a. Filters

There are four selectable filters on the Timesheet Management List. The user can opt to use one of or a combination of the Resource, Duration, Status or Structure Filters.

Filter	Description
User	Select a Resource from the user filter to display only timesheet records for that user. This filter is set to all by default.
Week Starting	By select week starting values, the user can alter the duration on which timesheet records are to be display.
Status	The user is able to select a status or status grouping.
Structure	The User is able to select from the structure

b. Actions for Timesheet Approvers

The following actions can be performed by the Timesheet Approver

Icon	Function
	Allows Timesheet Managers and Approvers to Open Timesheet Printout page where you can print timesheet in various formats.
	Allows Timesheet Approver to Approve selected timesheets. Multiple users can be selected and approved.
	Allows Timesheet Approver to Reject selected timesheets. Multiple users can be selected and rejected.
	Allows Timesheet Approver to Revert selected user timesheets to unsubmitted. Moves timesheet status from 'approved' to 'submitted for approval'
	Allows Timesheet Manager to open the Team Member's Task Buddy for the selected user timesheet. Ability to add time and update assignment status on behalf of the user for unapproved timesheets.
	Allows Timesheet Manger to Reopen selected user timesheet. Moves timesheet status from 'submitted' back to 'in progress'. Cannot reopen an approved timesheet.

c. Timesheet List Details

The Timesheet list details the Team Member, The Week Starting, Actuals Booked, Timesheet Status, submission date, submitted by, date approved and who carried out the approval.

How to open the Timesheet List



1. Click on the Timesheet icon in the Navigation Bar.
2. Select the Timesheet List option on the Timesheet Menu on the left of the screen and the Timesheet List will open.

2.3 Opening Timesheets

The Timesheet Approver or Manager can open a selected timesheet to examine in detail where time has been booked. The Approver can approve or reject the timesheet directly, if it has been submitted for approval, from the open timesheet if required.

How to Open a Timesheet

1. Select the Timesheet that is to be opened by clicking on its selectors.
2. Click on the Timesheet icon to open the selected timesheet.

Timesheet Printout for Andrew Robertson										
 										
Team Member : Andrew Robertson		Status : Submitted For Approval			Week Starting : 03 04 2006					
Employee Number : 91112		Date Submitted : 20/04/2006 05:11 PM			Date Approved : 20/04/2006 05:29 PM					
Billing Units : Hours		Submitted By : Andrew Robertson			Approved By : Ziggy Adams					
Billing Code	Description	03-Apr	04-Apr	05-Apr	06-Apr	07-Apr	08-Apr	09-Apr	Total	
2000	Design	8.00	8.00	8.00	8.00	8.00			40.00	
Total		8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00	

3. If the timesheet has been submitted for approval, the Approve or Reject icons will be displayed in the top left corner of the form. The Approver can process the timesheet directly from the form using these functions.

(See the Team Member Manual for more information regarding timesheets)

2.4 Processing Timesheet Lists

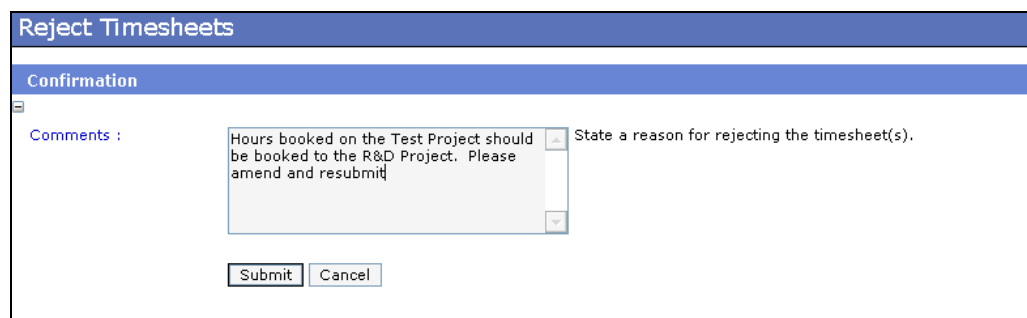
The Timesheet Approver can process Timesheets from the Timesheet Management centre by selecting the timesheet record(s) and clicking on a selected open, approve or reject action.

How to Approve Timesheets

1. Select Submitted Timesheet(s) that are to be approved by clicking on their selectors.
2. Click on the Approve icon to approve the selected timesheets. The status of the approved timesheets will be updated to Approved and Approved date and Approved by details will be updated.

How to Reject Timesheets

1. Select Submitted Timesheet(s) that are to be rejected by clicking on their selectors.
2. Click on the Reject icon to reject the selected timesheets. The Reject Timesheet box will open.



3. Enter the reason for rejecting the Timesheet. The reason will be sent to the Team Member whose timesheet is being rejected. Click the Submit and the status of the rejected timesheets will be updated to Rejected.

2.5 Reverting Timesheets

Reverting a timesheet changes it from Approved to Submitted for Approval. The timesheet can then be rejected and the Team Member can make modification to their timesheets. When the timesheet is submitted, all changes made are recorded in the Timesheet Journal. Any journal entries can then be exported to update external accounting systems.

How to Revert a Timesheet

1. Select the Approved Timesheet that is to be reverted by clicking on its selectors.
2. Click on the Revert icon to Revert the selected timesheets. The status of the Reverted timesheets will be updated to Submitted for Approval.

2.6 Open a Team Member's Task Buddy

The Timesheet Manager may need to update and submit Timesheets on behalf of a Team Member from time to time using the Team Member's Task Buddy. The Team Member's Task Buddy will record who makes changes.

How to open Task Buddy

1. Select the timesheet that the Task Buddy is to be opened for.
2. Click on the Team Member's Task Buddy icon (from the action icons on the Timesheet Management List) to open the Team Member's Task Buddy for the selected timesheets. (See the Team Members Manual for more details on using Task Buddy).

Do not click on the Task Buddy icon the Navigation Bar as this will open your Task Buddy.

2.7 Reopen Timesheets

The Reopen function timesheet changes a timesheet's status from Submitted for Approval to Open. The timesheet can then be updated and resubmitted by the Team Member.

How to Reopen a Timesheet

1. Select the Submitted for Approval Timesheet that is to be reopened by clicking on its selectors.
2. Click on the Reopen icon to reopen the selected timesheets. The status of the timesheet will be updated to Open.

3 Reports

A number of reports and exports can be used to help in the process of managing timesheets and integrating with external systems. Applicable Resource Reports have been added to the Timesheet Management Centre. The Timesheet EOP (End of Period) Report and Integration Settings can be configured to run from the System Administration Console. The Company Timesheet Report is available in the Organisation Administration area.

3.1 Resource Reports

Two reports have been added to the Timesheet Centre. For more details, see the Reporting Manual for details on the:

- Recorded Actuals Report
- Assignment Details Report

Reports run from the Timesheet Management Centre and use the Timesheet Approval and Management rights of the user as the default Reporting Rights.

3.2 Timesheet EOP Report

The Timesheet EOP (End of Period) Report runs at a time specified by the System Administrator from the Administration Console. The Report is sent by email to Timesheet Managers and Approvers and details the current status of the timesheets for resources they are responsible for. (See the System Administration Manual for more details)

3.3 Timesheet Integration

Timesheet Integration with an external system can be set up through a configuration file provided by Bijingo. The Integration process runs as system task from the System Administration Console.

Please contact Bijingo if your organisation is interested in integrating your Bijingo System with your finance system.

4 Implementing Timesheet Approvals

There are three administrative steps an organisation must perform to turn on the Timesheet Approval System.

1. Enable Timesheet Approvals

The Administrator must enable the timesheet submission and timesheet approval functionality in the Application Settings. (See Application Settings of the Administration Manual for more details).

Settings	Property	Description
Timesheet Submissions	Enabled	Must be enabled for timesheet approvals
Assignment Journal	Enabled	Must be enabled for timesheet approvals
Timesheet Approval	Enabled	Enabled
Timesheet Switchover Day	Day of the week	Day of the week timesheet approval summary updates on the homepage.
Timesheet Implementation Date	dd/mm/yyyy	Select a date approvals are to be implemented from. All timesheets before this time are ignored

The screenshot shows the 'Edit Application Settings' window with the 'Timesheet' tab selected. The 'Timesheet Approval' checkbox is checked. The 'Timesheet Switchover Day' is set to Wednesday. The 'Timesheet Implementation Date' is set to 19/06/2006. A 'Save' button is visible at the bottom.

2. Select Timesheet Approval Structure

The Administrator must select a Structure which will be used to manage the workflows for timesheet submissions and approvals. (See the Codes and Structures Manual for more details).



Note

It is strongly recommended that a Resource Breakdown Structure is used when implementing the Timesheet Approval System as they naturally reflect the approval and management of resources. Avoid using the Organisational, Work Breakdown or Skill Breakdown Structure if possible.

All	Name	Project Viewable	Mandatory	Timesheet	Program Structure	Resource Structure
▶	Cost Breakdown Structure	Yes	No	No	No	No
▶	Exec Report Structure	Yes	No	No	No	No
▶	Project Breakdown Structure	No	Yes	No	Yes	No
▶	Resource Breakdown Structure	No	No	Yes	No	Yes
▶	Resource Skill Structure	Yes	No	No	No	No

1. Select the Structure which is to used for Timesheet Approvals
 2. Click the Set Timesheet Structure icon
 3. The Selected structure will be marked as the Timesheet Structure.
- 3. Assign Timesheet Approvers, Managers and Team Members to the Structure.**
 The Administrator must assign team member, timesheet approval and timesheet manager roles to users within the timesheet approval structure. See the example in this manual for details on assigning roles. (See the Codes and Structures Manual for more details)