Synergist Spotlight on...
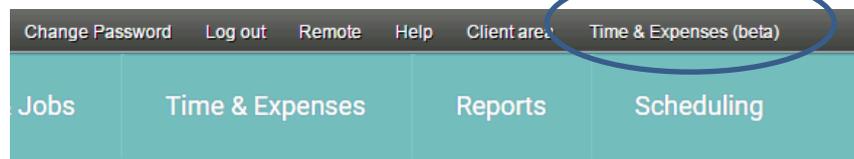
The new beta release Timesheet option

The new version 11 release of Synergist was a very noticeble upgrade with a new turquoise look and feel both within the main 4D and web timesheet interface.

However, you might not have noticed the option to switch to the beta release option within the Web Time and Expense interface. This early release can currently be used as an alternative to the existing timesheet interface.

How to switch to the new beta release timesheet

Log on to your timesheet as usual, look in the top right hand corner of the black ribbon menu bar, you should see a link to the timesheet beta option. Just click here.

You are immediately presented with the new dashboard and menu items. Details are listed below on the functionality of each menu item. If you feel would prefer to use the new beta release timesheet, then why not make it your default?

How default to the new beta release timesheet
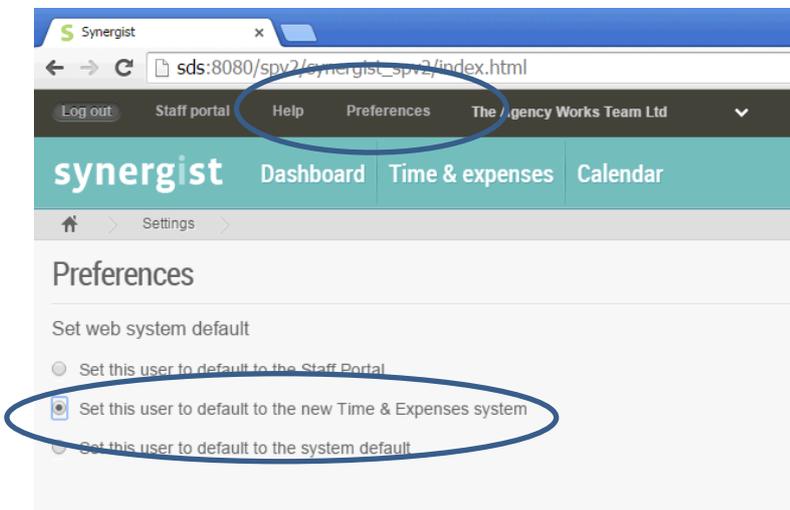
Within the black ribbon menu bar, Click 'Preferences' and choose the second option **'set this user to default to the new time & expenses System'.** These preferences are set per user and can be reversed at any point.

The following pages detail the areas that are included within the new beta release timesheet module.

Currently the new interface supports:

- **Time entry – daily & weekly**
- **Expense entry**

Not currently included is:

- **View access to jobs/clients etc.**
- **Team calendar**
- **My tasks**

If your organization currently relies on usage of any of these areas then you may need to switch back to the standard web interface to access these areas.

Dashboard

The dashboard is the default view within the new beta release and displays summary information relating to your time, your expenses and your calendar bookings.

Timesheet Summary

This dashboard is designed to give staff a clear idea of how many hours they have booked for the current period. The chart also divides the time into chargeable and non-chargeable work. A line is displayed horizontally across the chart to indicate the current number of hours required weekly to be logged by the user.
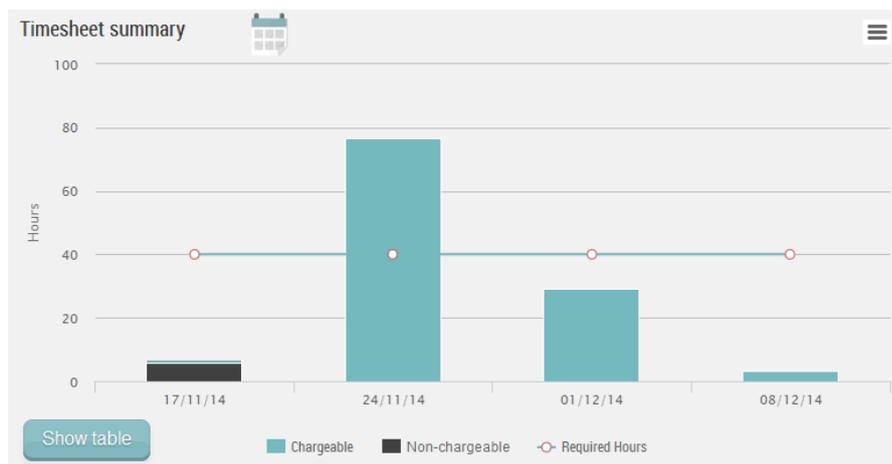
By default the last four weeks are displayed. However, there is a date picker so previous periods can also be temporarily selected. The chart includes posted timesheets and pending timesheets in the same view.

Expense sheet summary

This chart is a useful summary for users who post expenses. It shows the status of recent expense claims. This includes new expense claims that have not yet been submitted and expenses awaiting approval. It also includes expense sheets that have been returned and which the user therefore needs to address urgently (these are marked in red).
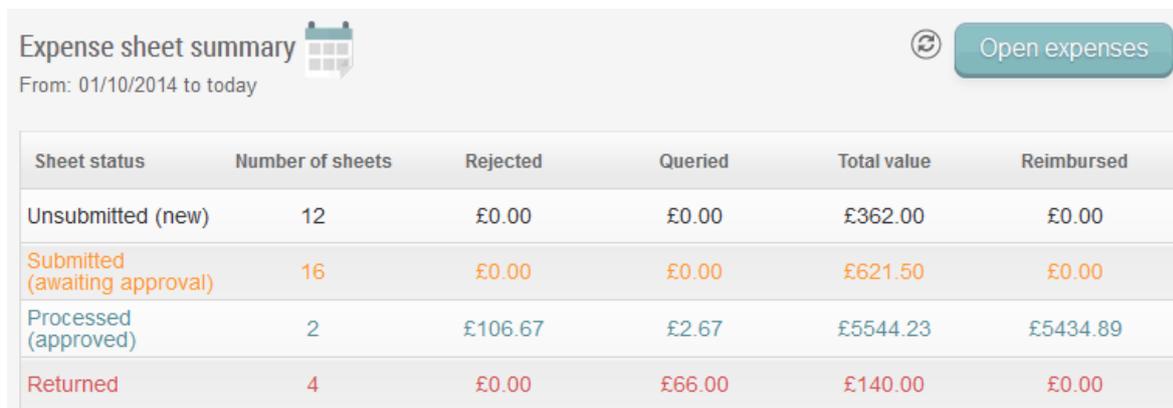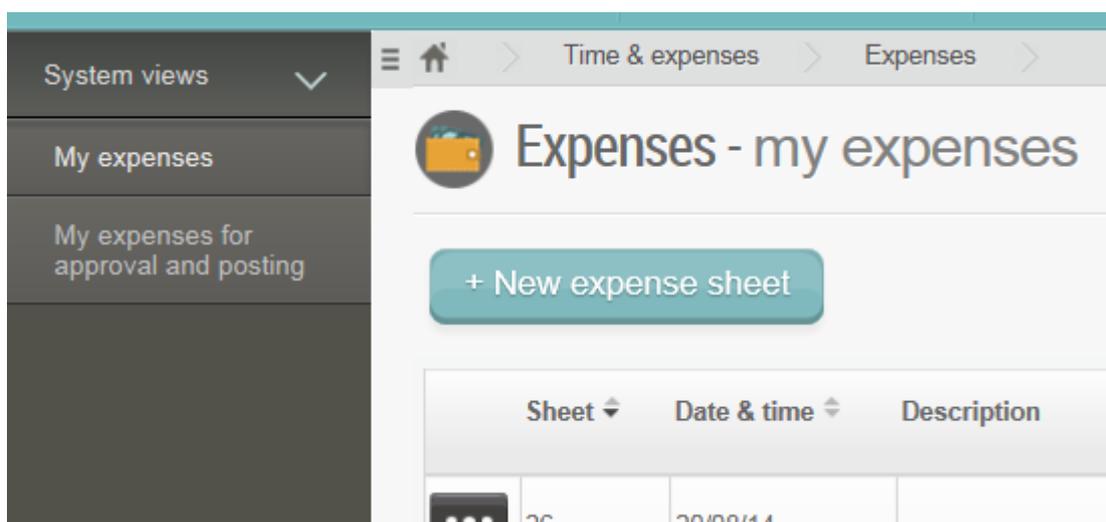
Expense sheet summary 📅
From: 01/10/2014 to today

🔄 Open expenses

Sheet status	Number of sheets	Rejected	Queried	Total value	Reimbursed
Unsubmitted (new)	12	£0.00	£0.00	£362.00	£0.00
Submitted (awaiting approval)	16	£0.00	£0.00	£621.50	£0.00
Processed (approved)	2	£106.67	£2.67	£5544.23	£5434.89
Returned	4	£0.00	£66.00	£140.00	£0.00

There is a button on this dashboard "Open expenses" to take you directly to your default list of expense sheets.

System views ⌄

My expenses

My expenses for approval and posting

≡ 🏠 > Time & expenses > Expenses >

🗂 Expenses - my expenses

+ New expense sheet

Sheet ⇅	Date & time ⇅	Description
••• 26	20/08/14	

Calendar summary

The Calendar summary dashboard lists any items that are in your work allocation calendar. It defaults to "today" and has an option to show the entire week. There is an option to drill down to any jobs that have been allocated to you. To see your full calendar simply click the calendar menu item on the main menu screen..
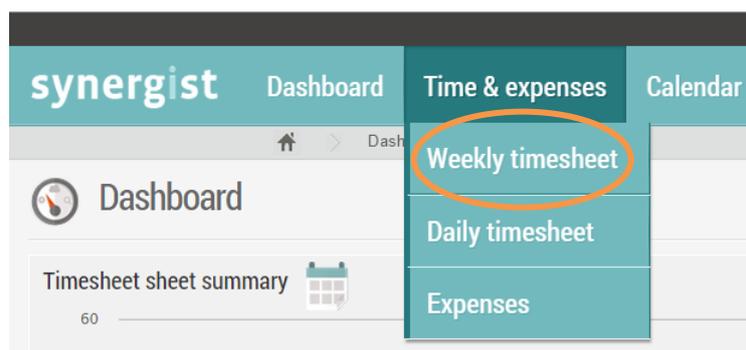
Due	Client	Job phase	Description	Chargecode	Calendar hours
15/12/14	Proton Cars plc	1/0000058…	Web site re-design	Creative Design	1
16/12/14	Proton Cars plc	1/0000058…	Web site re-design	Creative Design	1
16/12/14	Adams & Light Engineering AEIOU	1/45561.001	POS designs	HTML mockups	1
17/12/14	Proton Cars plc	1/0000058…	Web site re-design	Creative Design	1
18/12/14	Proton Cars plc	1/0000058…	Web site re-design	Creative Design	1

Adding time

Adding a new timesheet item from the Weekly View screen

1. After clicking "time & expenses" from the blue menu bar, choose the "weekly timesheet" option.

2. Click **Add job** in order to select a job/phase to record time against.

3. Use the **job picker** screen to filter the list by client, job name or job number. Enter the client name, or part of the name in the **search box**, then click on the black **Search** button.

You can refine the client list to show recently used jobs by clicking on the drop down arrow next to Normal View at the bottom of the client list. The options are to show recent jobs or recent phases.
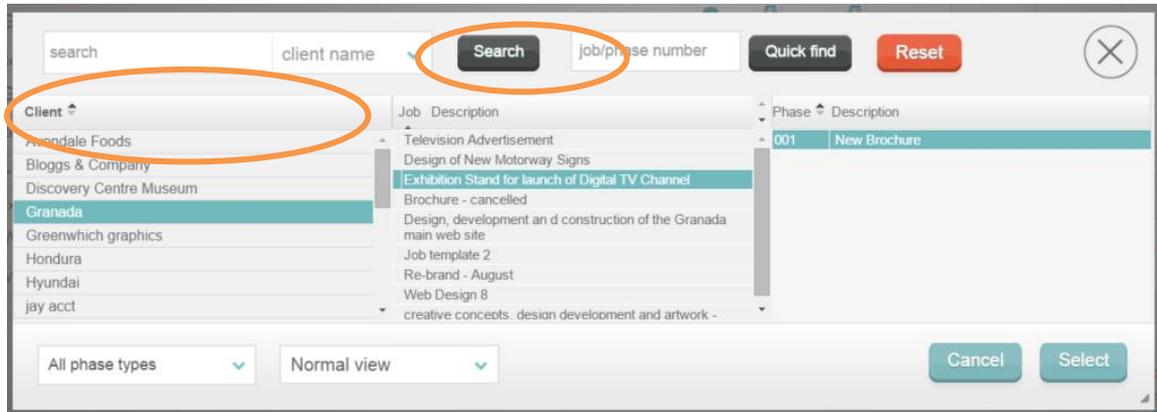
4. On selecting a client/prospect, all current jobs/opportuinites for the selected client/prospect will be listed along with phases (and stages if two-tier estimating is enabled).
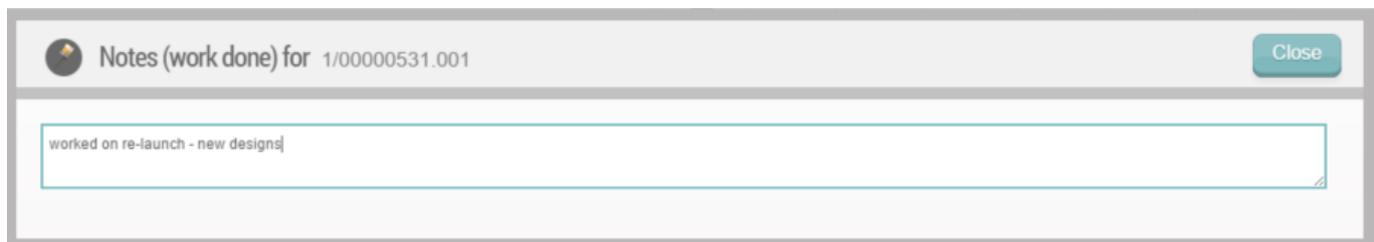

5. Click on the required phase then click on the blue **Select** button.

Notes can be added to each entry on the timesheet for further analysis.

To add a narrative to an entry, with the relevant date box, simply click on the speech balloon at the top left of the box.

6. The following screen will then open, allowing free text notes to be typed.

7. On each row of the timesheet you can "copy" or "delete" a row using the icon on the far left of the screen.
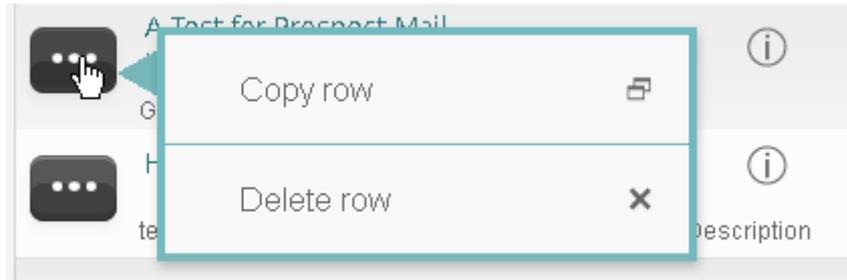
8. The weekly timesheet will default to the current week, but time maybe entered for previous dates by clicking the calendar icon on the top right, then selecting the required date from the calendar displayed.
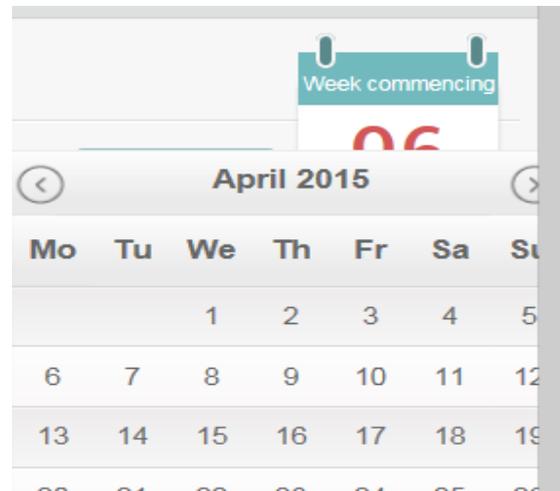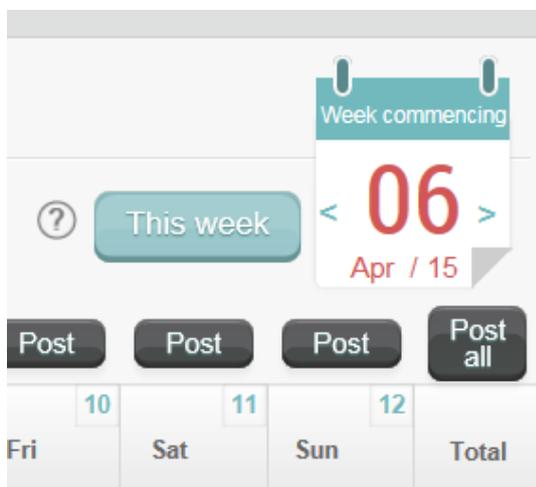

At the foot of the weekly timesheets screen, the total hours and required hours are displayed. The submitted time is displayed to show the split between chargeable and non-chargeable hours.

| Hours Required | 30 |
| Chargeable Submitted | 2 |
| Non-Chargeable Submitted | 2.25 |

Non chargeable time is defined as hours that have been recorded against an internal job or by using a charge code with a zero value charge.

Adding a new timesheet item from the Daily View screen

1. After clicking 'time & expenses' choose the **daily timesheet** option.
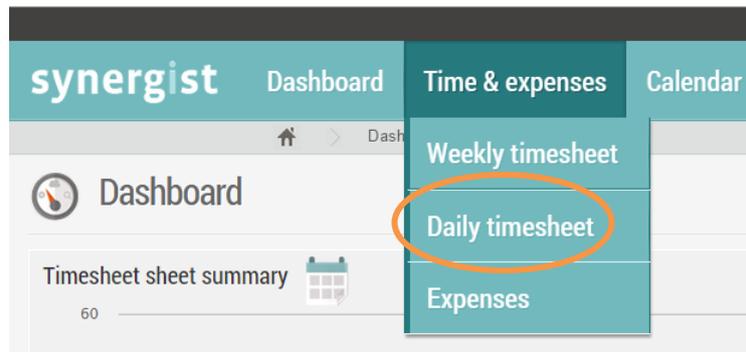
2. Select the job you wish to enter time against using the **Job Picker** screen:
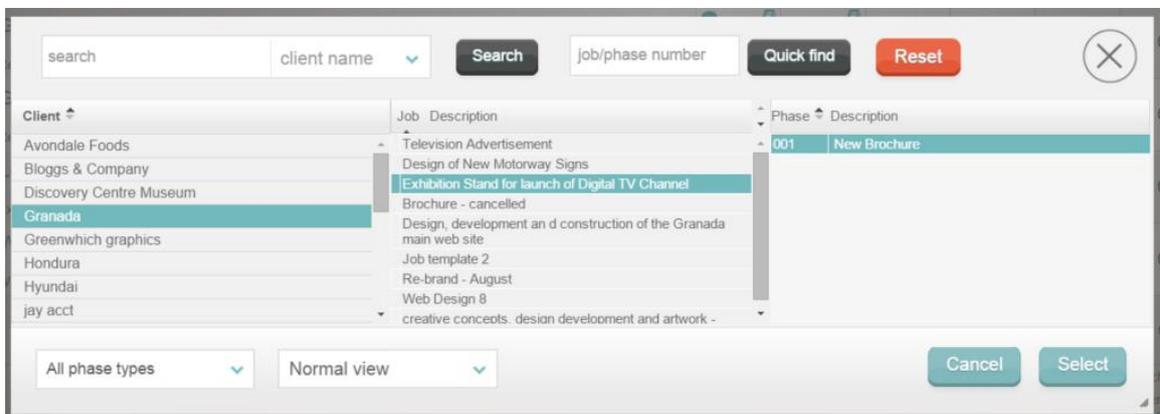
- Search by either the client name, job description or enter the Job/Phase number.

- Click on the blue Select button.

- This will put the entry at the top of the timesheet.

3. If you have a default charge code set up for your username then this will be automatically be populated, otherwise you'll need to select a charge code.

Notes can be added to each entry by clicking on the speech balloon at the top left of the box.

A dialogue box is displayed; type your notes relating to the hours entered within the white box.
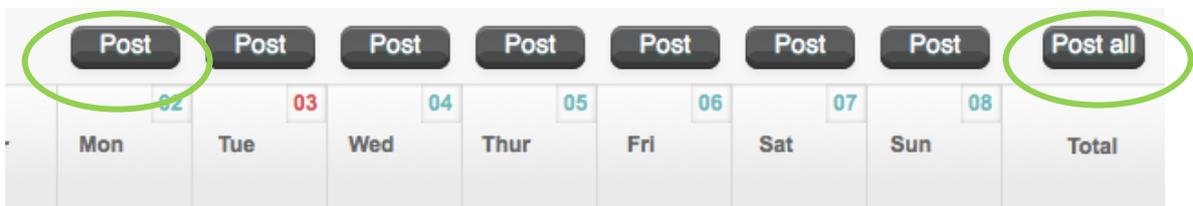
Posting/Submitting timesheets

Posting/Submitting timesheets confirms your time is correct, accurately recorded and that you're happy to post this time to the system.

If you are unsure whether any of your entries are incorrect, please seek advice before posting them.

To post a timesheet you can either post individual entries for the day by clicking **post** above the relevant day, or, you can post all items at once by clicking the **"Post All"** button above the Total column.

Time entered onto your timesheet is classed as **'pending time'**, not 'posted' or submitted'.

 'Posting' your timesheet will allow time to be posted directly to individual jobs and will update immediately.

Please note:
If the word **'submit'** is displayed in place of the word **'post'** then this indicates your Organsiation has timesheet approval in place.

**We would welcome your feedback and opinion of the
Beta release timesheet.**

**Are there areas missing that you would like to see included in a
future release?**

**Please contact The Agency Works at clientservices@taw.co.uk
Or call us on 01455 553246 as we can share your feedback with Synergist.**