



Timesheet Reporting

A key area within Synergist is the ability to post timesheets. This spotlight focuses on the many ways in which time can be reported within Synergist.

1. Job Level Reporting

Individual jobs and phases should be the source of generating detailed reports relating to a selected Job or Phase.

Standard Job or Phase Timesheet Reports

Click on the **printer icon** on the top right hand corner of a Job or phase and you will be presented with a number of key job reports:

- **Job Costs Detail**
- **Job Costs Summary**
- **Timesheet List**
- **Timesheet List Export**

The **Job costs detail & Job Costs summary** report are printable reports that contain information relating to all activity within a Job or a phase. Estimated and actual figures are displayed for Time, Purchases & Expenses. Details of Quoted values, Billing plan values & Invoiced values are also displayed. The Costs detail report displays all 'work done' descriptions.

The **timesheet List** report and **Timesheet list export** shows details of any timesheets posted to the selected Job or Phase.

12/01/16 4:19pm

Timesheet list

From 01/01/16 To 31/01/16

Job	Description	Date	Work done	Normal Hours	O'Time 1 Hours	O'Time 2 Hours	Total Hours	Charge Rate	Charge Total	Cost Total
Staff Name Tim Barton										
3/TH300066	Activity: 499 i need another	04/01/2016		5.00	0.00	0.00	5.00	100.00	500.00	375.00
3/TH300066	Activity: 499 i need another	07/01/2016		5.00	0.00	0.00	5.00	100.00	500.00	375.00
3/TH300066	Activity: 499 i need another	08/01/2016		5.00	0.00	0.00	5.00	100.00	500.00	375.00
Subtotal for Tim Barton				15.00	0.00	0.00	15.00		1,500.00	1,125.00
Staff Name Tom Thumb										
3/00300077	Quarter one 2015 advertisir	04/01/2016		5.00	0.00	0.00	5.00	125.00	625.00	500.00
3/00300077	Quarter one 2015 advertisir	07/01/2016		5.00	0.00	0.00	5.00	125.00	625.00	500.00
3/00300077	Quarter one 2015 advertisir	08/01/2016		5.00	0.00	0.00	5.00	125.00	625.00	500.00
Subtotal for Tom Thumb				15.00	0.00	0.00	15.00		1,875.00	1,500.00
GRAND TOTAL				30.00	0.00	0.00	30.00		3,375.00	2,625.00



There is the option to report on Timesheets within a selected date range or to report on all time. This report is commonly used by PR Companies who can then export the list of timesheets for the month to provide detail of how hours have been used.

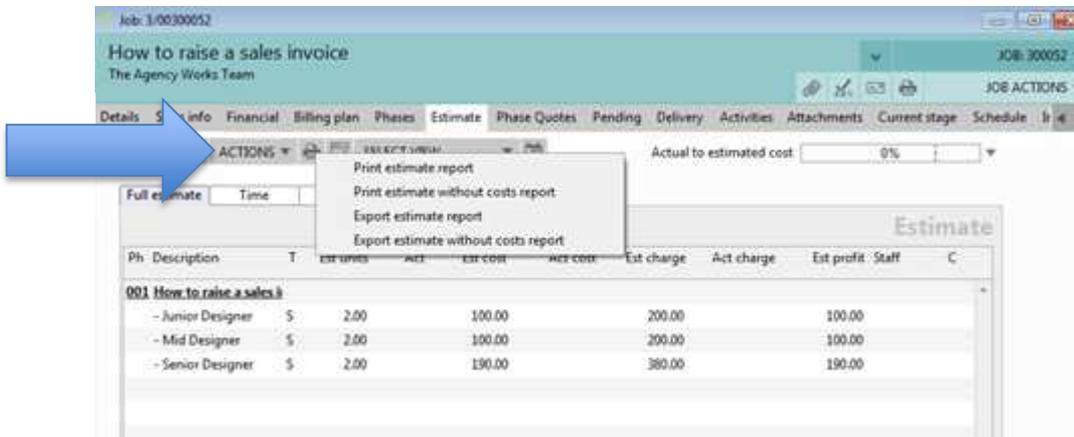
Estimate Tab Timesheet Report

You can view the estimate tab in a number of ways.

- Detailed, ordered by Phase
- Rolled up by Charge code
- Including detailed or summary stages, if 2 tier estimating is used
- Detailed or summary expenses if used.

(Go to www.theagencyworks.co.uk/resources/resources-for-synergist-users Spotlight 2 for detailed information about how to create and save estimate views.)

To run an estimate report click on the 'print icon' next to the **Actions Box** in the grey ribbon bar at the top of the estimate tab. You then have four options for printing an Estimate Report.



Sample of a Printed Estimate Report



Estimates

Job Number 3/00300052	Client 3/TAW	The Agency Works Team
Type Account Management	Contact	
Order Number	Project	
Handler Lesley Hill		
Quoted 780.00		

Description
How to raise a sales invoice

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Chg	Act Chg	Pick
001 How to raise a sales invoice								
- Junior Designer	S	2.00		100.00		200.00		
- Mid Designer	S	2.00		100.00		200.00		
- Senior Designer	S	2.00		190.00		380.00		
Phase Subtotals		6.00	0.00	390.00	0.00	780.00	0.00	
Totals		6.00	0.00	390.00	0.00	780.00	0.00	
Est. Profit					390.00	50.00%		
Gross Est. Profit					780.00	100.00%		

Sample of an Exported Estimate Report

A	B	C	D	E	F	G	H	I	J	K	L
Phase No	Description	Type	Estimated Units	Actual Units	Estimated Cost	Actual Cost	Estimated Charge Rate	Estimated Charge	Actual Charge	Estimated Profit	Estimated Gross Profit
1	How to raise a sales invoice						0	0			
	- Junior Designer	S	2		100		100	200		100	200
	- Mid Designer	S	2		100		100	200		100	200
	- Senior Designer	S	2		190		190	380		190	380

2. Timesheet reports using Standard Reports

The key timesheet reports are:

- **Staff Analysis** – Gives detail regarding chargeable/non chargeable time and a breakdown of overtime. Additional criteria can be used to show a breakdown by job.
- **Staff Utilisation** – A key report giving percentages of time recorded based on required hours and target hours. E.g. if 40 hours per week are recorded and 30 of these should be chargeable the Staff utilisation report will show a percentage of each of these. Within File maintenance/staff/select user and the required and target hours can be entered. Part time working can also be detailed here.

Timesheet analysis

Specify days normally worked

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Required

Daily hours

Weekly hours

Target chargeable

Daily hours

Weekly hours

- **Timesheet List** – This report is the same report that is detailed within a job record. However this will show a list of timesheets that an individual has recorded between two dates over multiple jobs.
- **Timesheets by Day** – A simple weekly or monthly report that shows the number of hours an individual has recorded. Additional criteria allows this report to show 5 daily columns (default), 5 weekly columns (tick 'By Week') or 5 monthly columns (tick 'By Month'). This is also useful to report on pending time.

Timesheets - By Day

Show details

Show Stage description

By Week (Starting Fri)

By month

Include Normal

Include Ot1

Include Ot2

Separate totals for normal and overtime

Hide costs

Include pending

Include real timesheets

Include...

Ticked off

Unticked off

Data Series

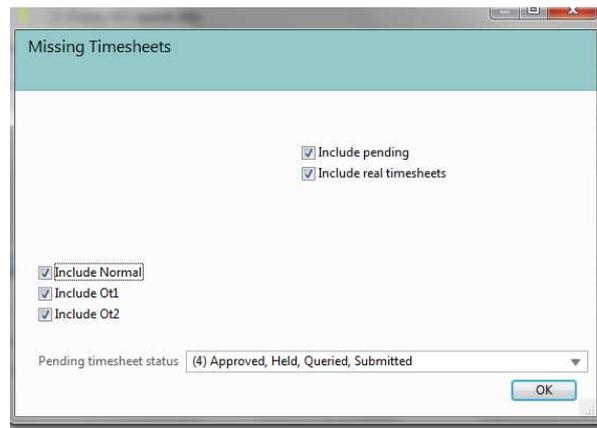
Units

Charge

Cost

OK

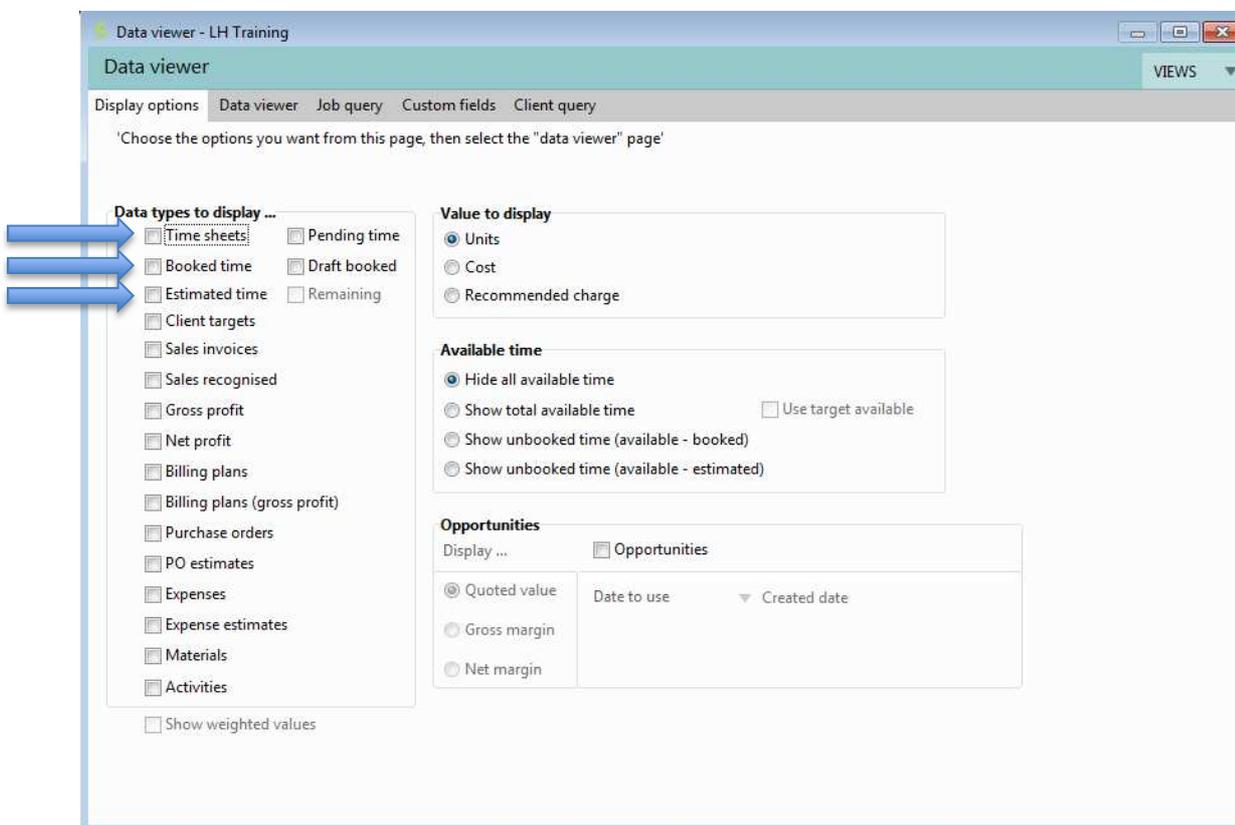
- **Missing Timesheets** – This report is a weekly report that only shows entries for those who do have missing timesheets. Additional criteria allow you to include Pending Time and Overtime if used.



3. Timesheet reports using the Data Viewer

Access the Data Viewer from the main **Reports** toolbar menu, and then click on the **Data Viewer** icon.

1. The **'Display Options tab'** lists the tables that can be reported on using Data viewer. Select one of these items and how you would like the data to be displayed. E.g. for time in hours or cost/charge.





Include ...

<input checked="" type="checkbox"/> Incomplete	<input checked="" type="checkbox"/> Not final invoiced
<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/> Final invoiced
<input checked="" type="checkbox"/> Unquoted	<input checked="" type="checkbox"/> Internal - raised on int. clients
<input checked="" type="checkbox"/> Quoted	<input type="checkbox"/> External

- Drag in job/phase or charge code to get the granularity about what internal time is being recorded.

Data viewer - LH Training

Data viewer

Display options | Data viewer | Job query | Custom fields | Client query

'Select the items you want to see (drag them from the window on the left), set the date options, then click the GO button'
'Data Type' will be automatically included if you don't select it yourself

GO

Bill-to Client Client Client Market Sector Client Source Client Status

Job Phase Staff Charge code

Date & period
01/01/2016
Friday
 Use a pre-set range
This month

Daily
 Weekly No. of weeks 5
 Monthly
 Custom

to use one item for "columns", put a tick here

Job Phase	Staff	Charge code		01/01/2016	08/01/2016	15/01/2016
3/00300059.002 - 2016	Lesley Hill	Holidays	Time Actual	22.50	0.00	
3/00300077.001 - January	Tom Thumb	Creative Head	Time Actual	10.00	5.00	
3/TH300066.001 - Internal Training	Tim Barton	Account Management	Time Actual	10.00	5.00	
		Senior Artworker	Time Actual	5.00	0.00	

Timesheets by Job status

- Add a tick to job status to show the number of hours recorded for the period by job status. Try this also by ticking job type.

Data viewer - LH Training

Data viewer

Display options | Data viewer | Job query | Custom fields | Client query

'Select the items you want to see (drag them from the window on the left), set the date options, then click the GO button'
'Data Type' will be automatically included if you don't select it yourself

GO Auto refresh

Internal/External Job Type Job Job Status Material

Job Phase Staff Charge code

Date & period
01/01/2016
Friday
 Use a pre-set range
This month

Daily
 Weekly No. of weeks 5
 Monthly
 Custom

Options
 Show descriptions
 Show codes
 Hide zeroes

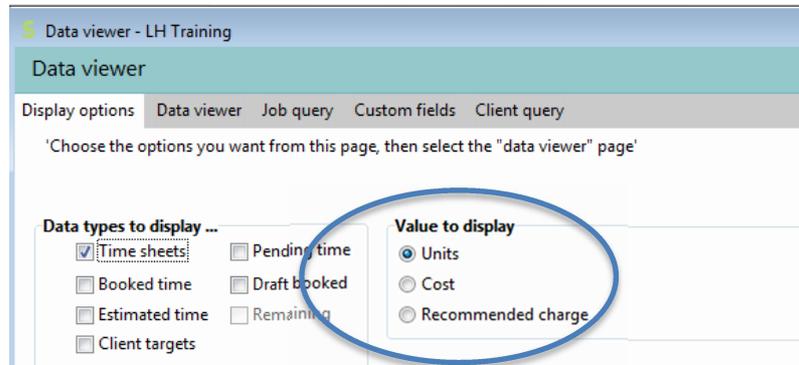
to use one item for "columns", put a tick here

Job Phase	Staff	Charge code		In-house	Live	Quote	Total
3/00300059.002 - 2016	Lesley Hill	Holidays	Time Actual	22.50	0.00	0.00	22.50
3/00300077.001 - January	Tom Thumb	Creative Head	Time Actual	0.00	15.00	0.00	15.00
3/TH300066.001 - Internal Training	Tim Barton	Account Management	Time Actual	0.00	0.00	15.00	15.00
		Senior Artworker	Time Actual	0.00	0.00	5.00	5.00



Time Units

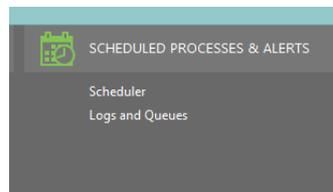
Report in the data viewer by units of time, cost or recommended charge of hours recorded.



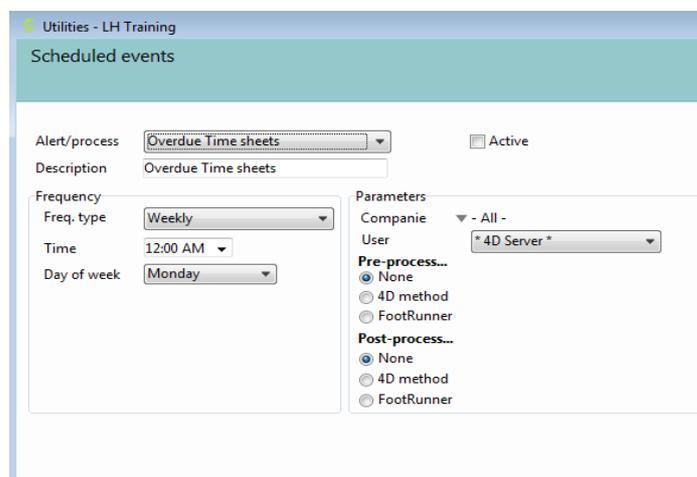
Scheduler

Use the Scheduler, located in **Tools & settings, Utilities** to set up an auto alert to remind individuals and a Line Manager that timesheets are late.

- To set this up your organisation needs to have alerts working. Please contact the Synergist helpdesk to see if your set up is compatible with alerts.
- Go to the Utilities Menu, then Scheduled Processes & Alerts, select Scheduler.



- Click 'new' at the bottom left of the screen. Select Over due timesheets from the drop down lists of alert/processes.





- Recommended to set this weekly for a Monday morning so that users are reminded of last week's overdue timesheets.
- Also check on the User records within the 'approval' tab that a Line Manager has been selected.
- When the alert is triggered, both the individual and the 'managed by' user will receive an alert.

Lesley Hill

Details Approval Access CRM Licensing groups Modules Setup W

Timesheet

Can post timesheets

Web timesheets UI Standard Weekly Both

Default to weekly web timesheet

Timesheet approval

Timesheet approval level

None 1 2 3 4

Approve all timesheets

Managed by

Please contact The Agency Works at

clientservices@taw.co.uk

Or call us on

01455 553246

If you wish to further discuss Timesheet Reporting.