# Business World User Guide

| | |
|---|---|
| Title | Timesheet Approval |
| Summary | Timesheets are used to record the hours resources have spent on various tasks/jobs during a week. They are not flexi sheets.<br><br>All timesheet rows require approval by a line manager and some may also require authorisation by a Project Manager and/or Cost Centre Manager.<br><br>This guide will show you how to authorise the timesheets of your staff/those staff working on your work orders. |
| Audience | Line managers, project managers and cost centre managers. |
| Content | 1. Viewing timesheets ready for approval<br>2. Information on the timesheet<br>3. Approving all timesheet rows (Simple Mode)<br>4. Approving or rejecting individual lines of a timesheet (Advanced Mode)<br>5. Deadlines<br>6. Further information |

## VIEWING TIMESHEETS READY FOR APPROVAL

Example – a particular resource has entered two timesheets – shown below:

Week 201912

Time entry

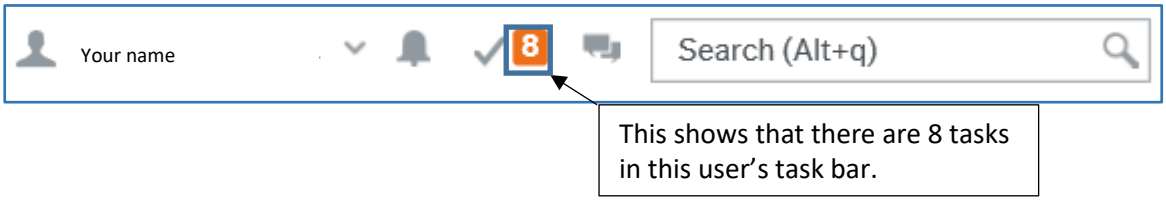
| Zoom | Time code | Work order | Project | Activity | Description | ACE | Time unit | Mon 10/06 | Tue 11/06 | Wed 12/06 | Thu 13/06 | Fri 14/06 | Sat 15/06 | Sun 16/06 | Sum | Inv.value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | N | AT0380183... | AT0380183 | GENE | Sunday Play... | | Hours | 7.40 | 4.00 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15.40 | 0.00 |
| | N | AT0410HOL... | AT0410H... | 9960 | Holiday / Out | | Hours | 0.00 | 0.00 | 0.00 | 7.40 | 7.40 | 0.00 | 0.00 | 14.80 | 0.00 |
| | N | CA0002100... | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 3.40 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.40 | 0.00 |
| Σ | | | | | | | | 7.40 | 7.40 | 8.00 | 7.40 | 7.40 | 0.00 | 0.00 | 37.60 | |

Week 201913

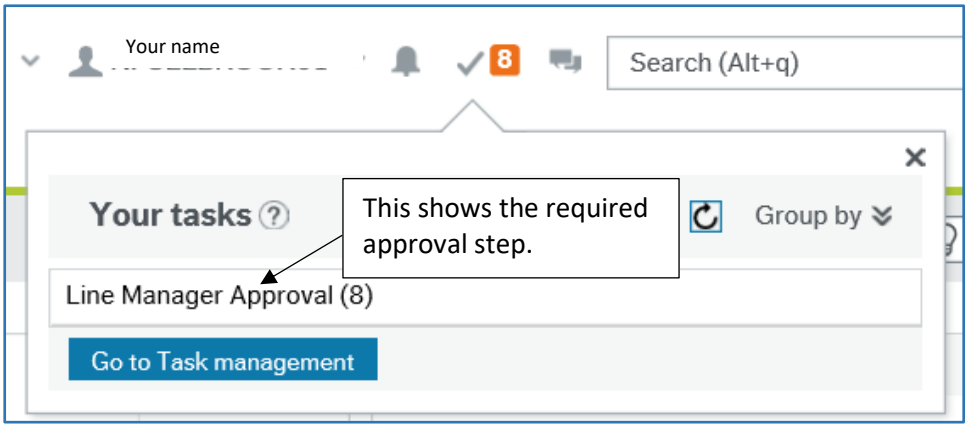
Time entry

| Zoom | Time code | Work order | Project | Activity | Description | ACE | Time unit | Mon 17/06 | Tue 18/06 | Wed 19/06 | Thu 20/06 | Fri 21/06 | Sat 22/06 | Sun 23/06 | Sum | Inv.value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | N | AT0380183... | AT0380183 | GENE | Sunday Play... | QPENCE | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5,000.00 |
| | N | AT0380183... | AT0380183 | GENE | Sunday Play... | | Hours | 0.00 | 7.40 | 7.40 | 7.40 | 0.00 | 0.00 | 0.00 | 22.20 | 0.00 |
| | N | AT0410HOL... | AT0410H... | 9960 | Holiday / Out | | Hours | 7.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.40 | 0.00 |
| | N | CA0002100... | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 8.00 | 0.00 |
| | Q150T | CA0002100... | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.00 | 0.00 | 6.00 | 0.00 |
| Σ | | | | | | | | 7.40 | 7.40 | 7.40 | 7.40 | 8.00 | 6.00 | 0.00 | 43.60 | |

As with all other authorisations you are required to do, the **Tasks** button in the top right of your screen will show you if there is something to do.




To look at your tasks, click on the orange box – a **Your tasks** pop-up will appear.

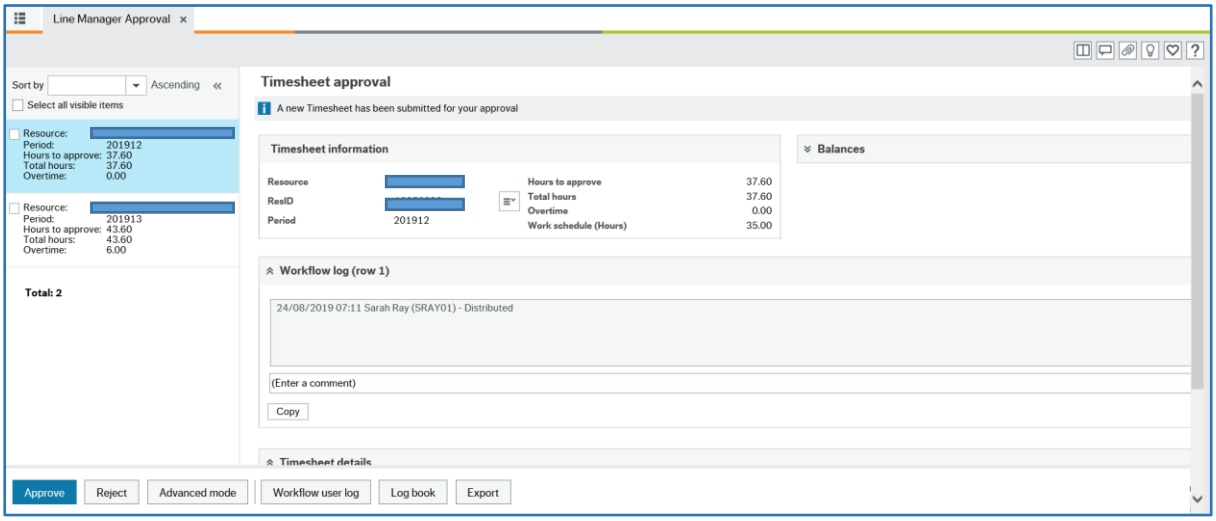



There are other steps you might see here, depending on which approval level you are – the others are *Project Manager Approval* and *Cost Centre Manager Approval*. Whichever step of approval you are, you will only see timesheet rows which are relevant to you. Only the line manager will see all rows of the timesheet.

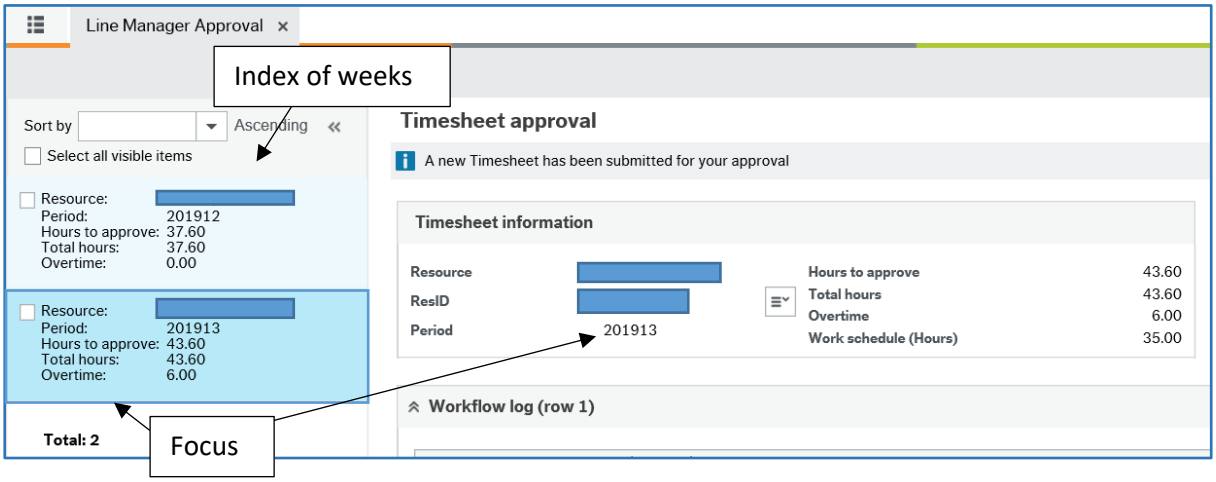
If you are the line manager *and* the project manager, you will only see the row in your line manager step. Likewise, if you are Project Manager and Cost Centre Manager, then you will only see that row as Project Manager (you don't need to authorise it twice).

You can now either click on **Go to Task management** or **Line Manager Approval** in the **Your tasks** pop-up.

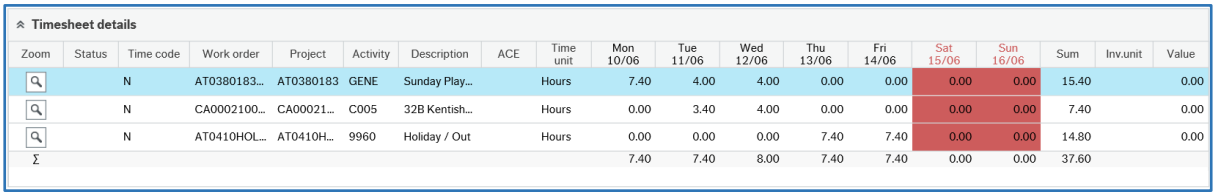
Using the **Line Manager Approval** (or **Project Manager Approval** or **Cost Centre Manager Approval**) view is the easier and recommended way to look at these tasks, and takes you straight to the timesheet for each week:




Clicking between weeks in the menu on the left-hand side of the screen will change the screens' focus to the week selected.



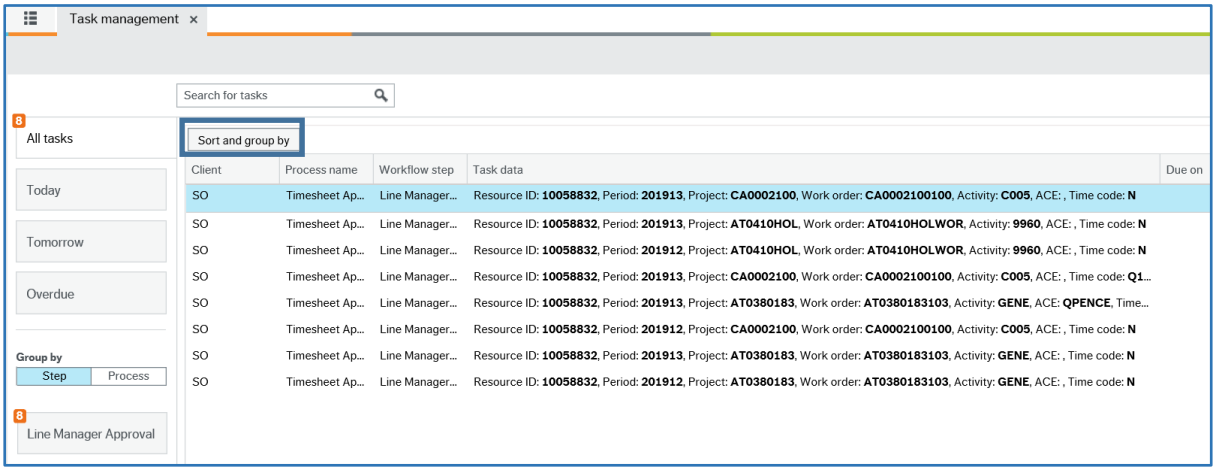

Scrolling down will enable you to see all the rows you need to authorise in the week you have chosen to view:



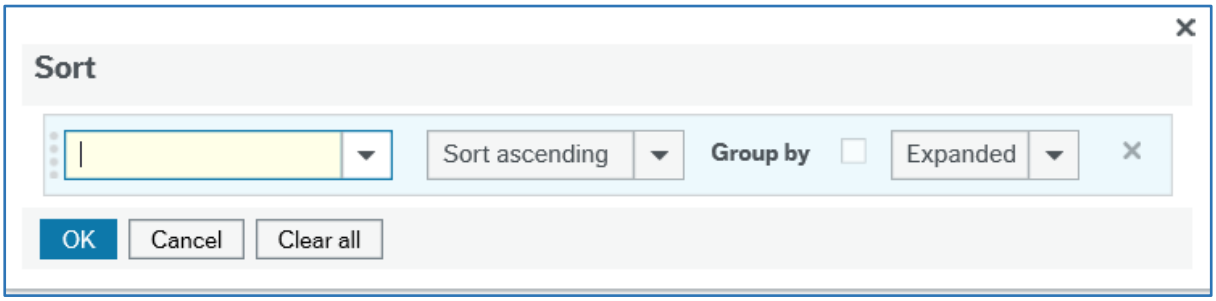

| Zoom | Status | Time code | Work order | Project | Activity | Description | ACE | Time unit | Mon 10/06 | Tue 11/06 | Wed 12/06 | Thu 13/06 | Fri 14/06 | Sat 15/06 | Sun 16/06 | Sum | Inv.unit | Value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | N | AT0380183... | AT0380183 | GENE | Sunday Play... | | Hours | 7.40 | 4.00 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15.40 | | 0.00 |
| | | N | CA0002100... | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 3.40 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.40 | | 0.00 |
| | | N | AT0410HOL... | AT0410H... | 9960 | Holiday / Out | | Hours | 0.00 | 0.00 | 0.00 | 7.40 | 7.40 | 0.00 | 0.00 | 14.80 | | 0.00 |
| Σ | | | | | | | | | 7.40 | 7.40 | 8.00 | 7.40 | 7.40 | 0.00 | 0.00 | 37.60 | | |

Alternatively, using the **Go to Task management** option to view timesheets allows you to group all of your tasks by step or process, but requires another click to get into the actual timesheet authorisation screen.

At the moment, the below **Task management** view shows different weeks mixed together, but you can click on **Sort and group by** to sort by task data.

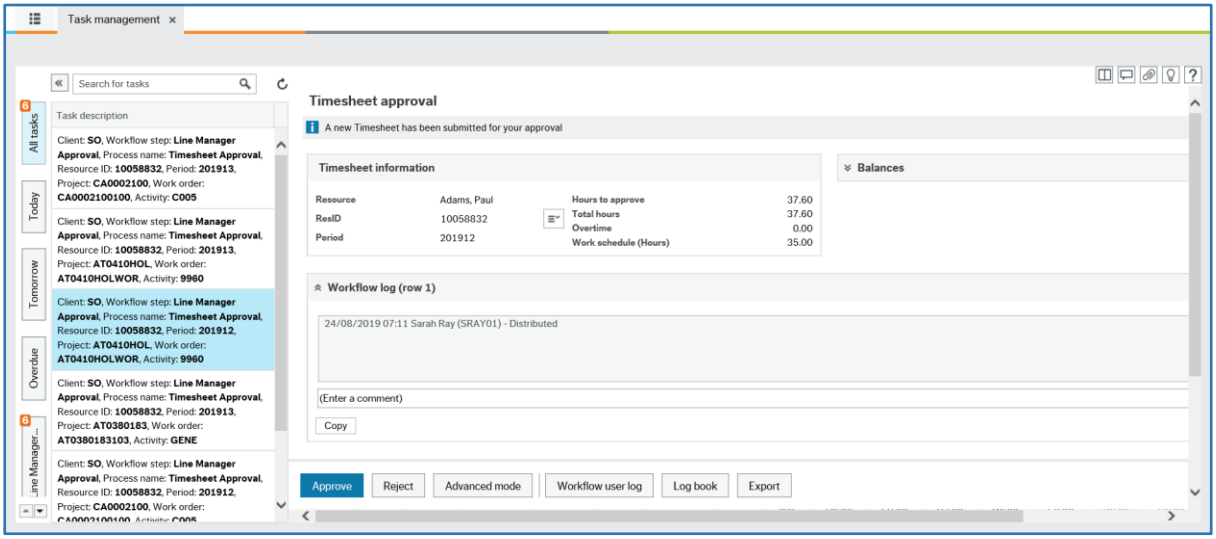



Clicking on **Sort and group by** will then bring up the below pop-up which can then be used to filter your tasks:

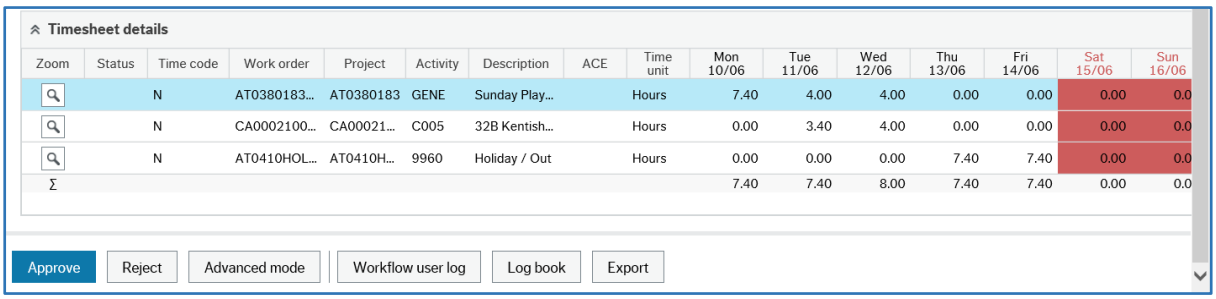



Click on the drop down and choose **Task data** and click **OK.** Your tasks should now be sorted by resource ID, period, etc.

Double-clicking on a timesheet row in the main **Task management** screen takes you into the approval screen – note it takes you into the first row to be authorised regardless of what you clicked on in Task management.




Scroll down to see all the timesheet rows:




Note that if a timesheet row appears in italics, this means that is has already been authorised. This can happen where a line manager has rejected one row but approved the rest.

## INFORMATION ON THE TIMESHEET

Below is an example of a timesheet received by a line manager.

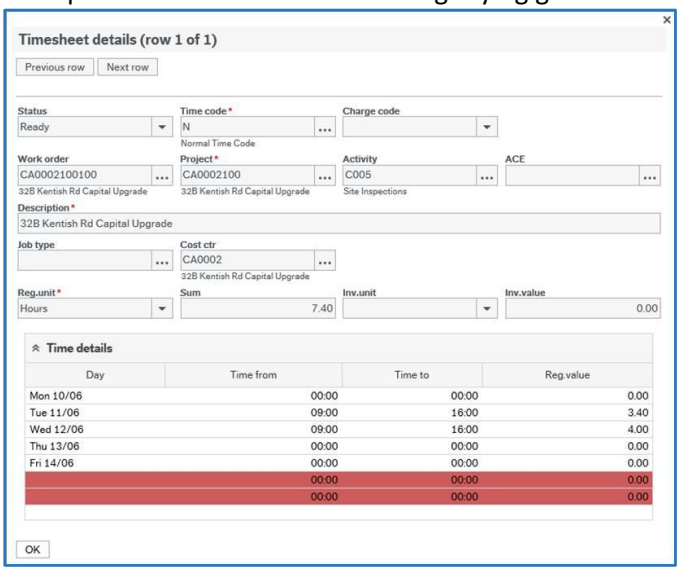
Timesheets can be sorted by column by clicking on the header of the column you wish to sort by. A small arrow icon should then appear in the header for that column – an up arrow means the column is sorted by ascending order, and a down arrow means the column is sorted by descending order.

| Zoom | Status | Time code | Work order | Project | Activity | Description | ACE | Time unit | Mon 17/06 | Tue 18/06 | Wed 19/06 | Thu 20/06 | Fri 21/06 | Sat 22/06 | Sun 23/06 | Sum | Inv.unit | Value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Q150T | CA0002100100 | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.00 | 0.00 | 6.00 | | 0.00 |
| | | N | CA0002100100 | CA00021... | C005 | 32B Kentish... | | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 8.00 | | 0.00 |
| | | N | AT0410HOLW... | AT0410H... | 9960 | Holiday / Out | | Hours | 7.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.40 | | 0.00 |
| | | N | AT0380183103 | AT0380183 | GENE | Sunday Play... | QPENCE | Hours | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Number | 5,000.00 |
| | | N | AT0380183103 | AT0380183 | GENE | Sunday Play... | | Hours | 0.00 | 7.40 | 7.40 | 7.40 | 0.00 | 0.00 | 0.00 | 22.20 | | 0.00 |
| Σ | | | | | | | | | 7.40 | 7.40 | 7.40 | 7.40 | 8.00 | 6.00 | 0.00 | 43.60 | | |

**Explanations of timesheet fields**

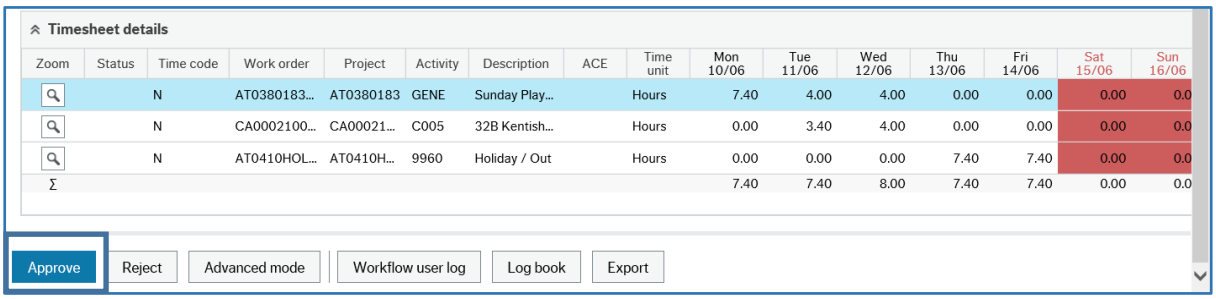
| | |
|---|---|
| Zoom | Same row details but different format, not normally used. |
| Time code | Describes the type of hours worked. Most teams will only use N**,** but where the charge is affected it may show, for example, Q150T = time & a half. |
| Work order | The area being worked on – this could be a particular site or a type of work such as annual inspections. It is a 12 digit code incorporating the project code. |
| Project | This is used to group work orders. For example, work on voids might be one project with each site being a separate work order. This is a 9 digit code and the first 6 digits are the cost centre. |
| Activity | Describes the type of work carried out on the work order on that day e.g. meetings, site inspections, or permits. |
| Description | The name of the project. |
| ACE | This field is used to show additional costs such as driving specialist machinery. Most teams will leave this blank but where the charge is affected it may show, for example, a pence addition such as QPENCE. |
| Hours | Hours worked per day on this work order (where ACE is blank). |
| Sum | Sum of hours worked on this work order over the week (excludes ACE). |
| Inv.unit | If an ACE has been used it will show 'Number'. |
| Value | Quantity of ACE, for example Inv.unit of 5000 = £50.00 |

Example below shows use of the magnifying glass **Zoom** icon to the left of a row in a timesheet



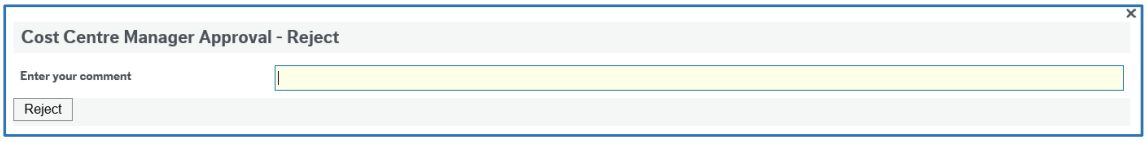
## APPROVING ALL THE TIMESHEET ROWS YOU CAN SEE (SIMPLE MODE)

If you are happy that the timesheet as a whole reflects the hours and jobs (work orders) worked on then all the rows can be approved in one go. Just click the **Approve** button at the bottom left hand side of the screen:




You will receive a message to say the item has been successfully processed.

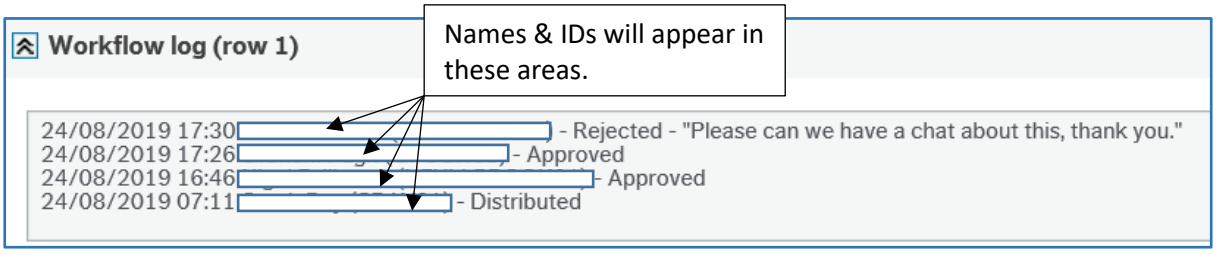
Alternatively you may need to reject the timesheet by clicking the **Reject** button - a pop-up will then appear asking you to detail a reason for the rejection. Simply put your reason in the text box and click reject:




You will receive a message to say the item has been successfully processed.

Please note that any rejected timesheet goes back to the initiator for amendment if appropriate. It will then go through the whole workflow route again so that each manager has a chance to see any changes that have been made.

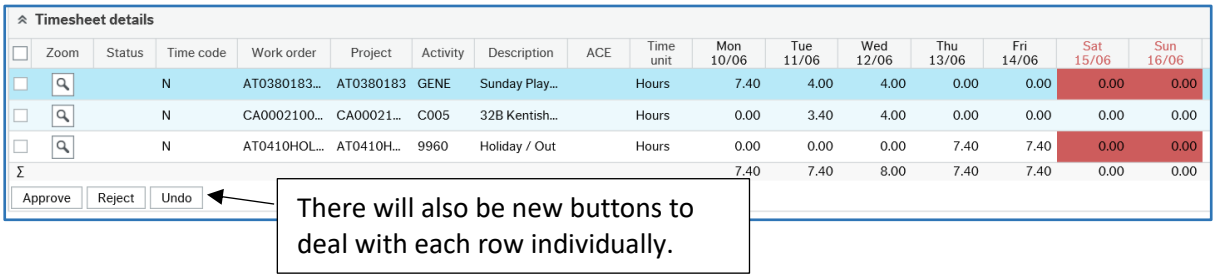
The initiator can see the reject message in the workflow log and this is viewable to all approvers.



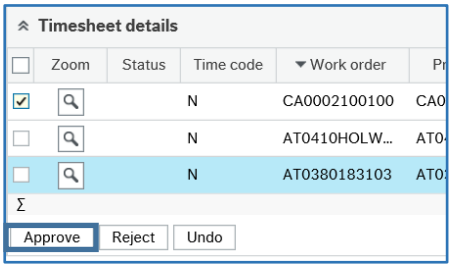
## APPROVING OR REJECTING INDIVIDUAL LINES OF A TIMESHEET

From the buttons at the bottom of the approval screen select **Advanced Mode**:

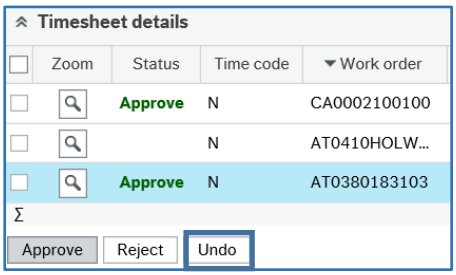
The Timesheet details section will change slightly to show a tick box on the left-hand side of each row, next to the Zoom feature:




For each row you want to approve simply check the relevant tick box and then click **Approve**:

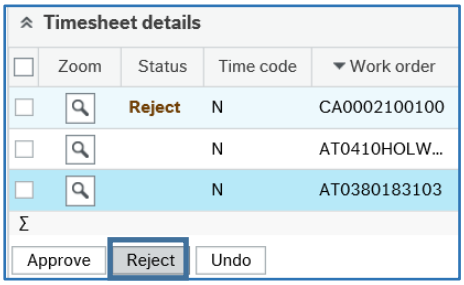



Rows that have been approved will then look like this:

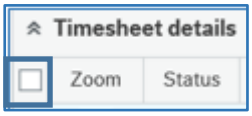



To reverse the status, click the row and press **Undo.**

Similarly, if you wish to reject a row click the box to add the tick and then click **Reject** (which you can also reverse).



If you click the top left hand box next to the Zoom field header it will tick all the rows and add whatever action button you click next to each.




If you wash to change back to the basic screen, just click the **Simple mode** button.

Once you have approved or rejected a timesheet, click **Save**. If you have more weeks to authorise the screen will return to the next period (week).

If there is only one remaining week the index on the left hand side of the screen will have disappeared.

## DEADLINES

If you notice something in your task bar and then the next day it has vanished this is because there are deadlines on timesheet approval.

If a task is unable to be approved or rejected in time it will move automatically to the next step and person responsible.

## FURTHER INFORMATION

If you have any further questions, please do not hesitate to contact the Business World inbox at Business.World@southampton.gov.uk.

Please also find a link to the Business World FAQs on Staff Stuff here.