UniPhi 19

Timesheet Administrator License Manual

Version Date 01 September 2023

Contents

About This Manual

The aim of this manual is to provide instructions for managing timesheet administration tasks for Timesheet Administrators. This is a type of UniPhi license that allows for the administration of timesheets for their organisation.

How to use this Manual

As you read this manual you will notice the following icons recurring which will help to highlight and enable you to quickly locate activities and summary areas, they will also assist with tips for keeping

Puzzle Piece:

The puzzle piece appears at the beginning of each session and any major section to mark the overview of that item's content or concept.

Cogs:

The cogs denote a step by step activity to be completed using UniPhi by the participant relative to the section it is located in.

Light bulb:

The light bulb denotes a helpful hint or tip you should be aware of.

Screenshots have been used throughout the manual to demonstrate what you should be viewing as you move through the activities. They are for illustrative purposes only. Details such as dates, budget figures and other entered text/data may vary.

Timesheets Administrators

For UniPhi deployments that have cross organisational collaboration, the Timesheet Administration license allows for each organisation to have one or more people manage time sheet functionality.

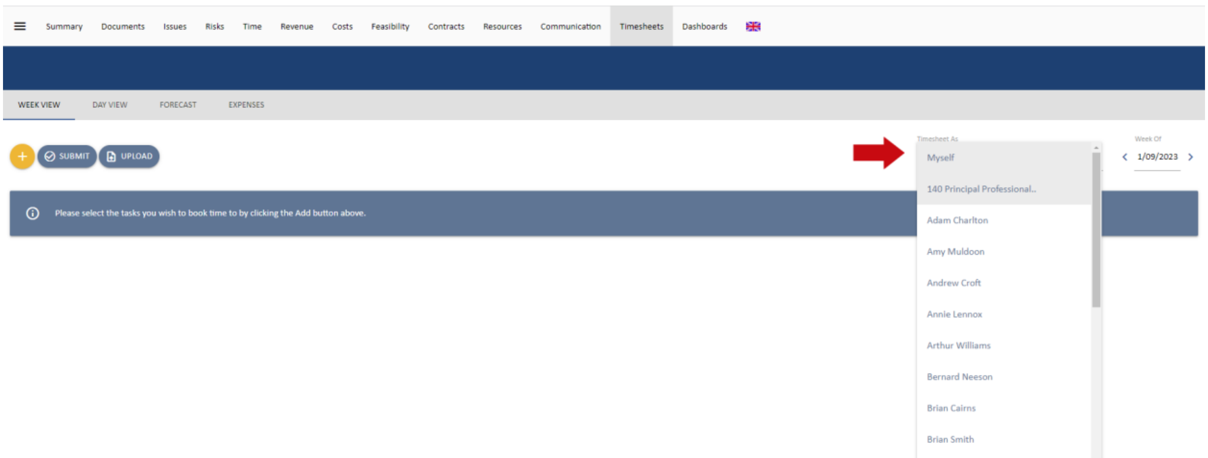
The access and functionality given to a Timesheet Administrator is limited to the time sheet data of the person's organisation.

This functionality includes:

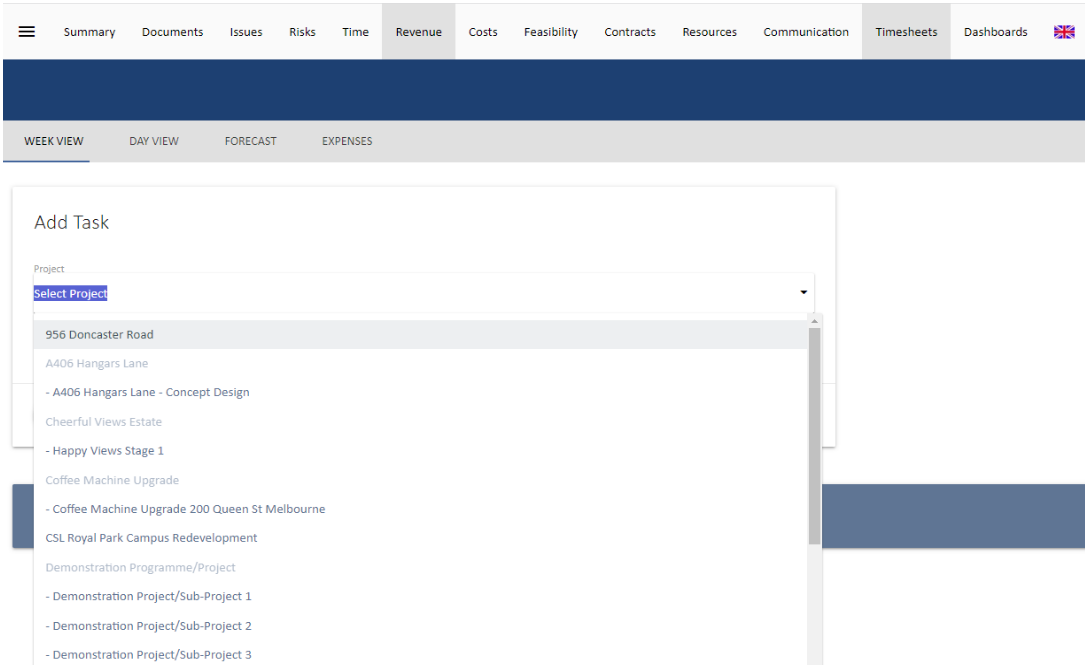
- Timesheet As – enter the timesheet for another person in you organisation.
- Submit – submit all/some the timesheets for people in your organisation for a given week.
- Roll Back – re-open submitted timesheets for people in your organisation for a given week.
- Reports – timesheet reports limited to your organisation's timesheet data.

Timesheet As

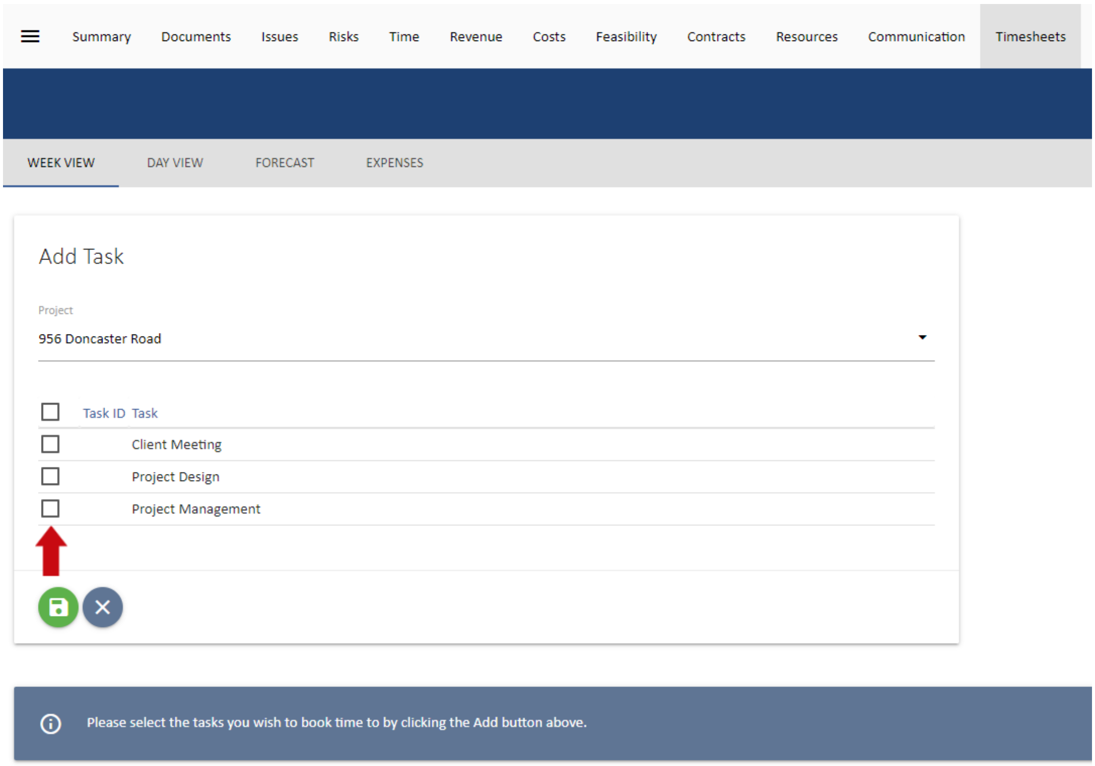
The default selection is for the logged in user to "Timesheet As" "Myself", to enable you to submit our own timesheet.

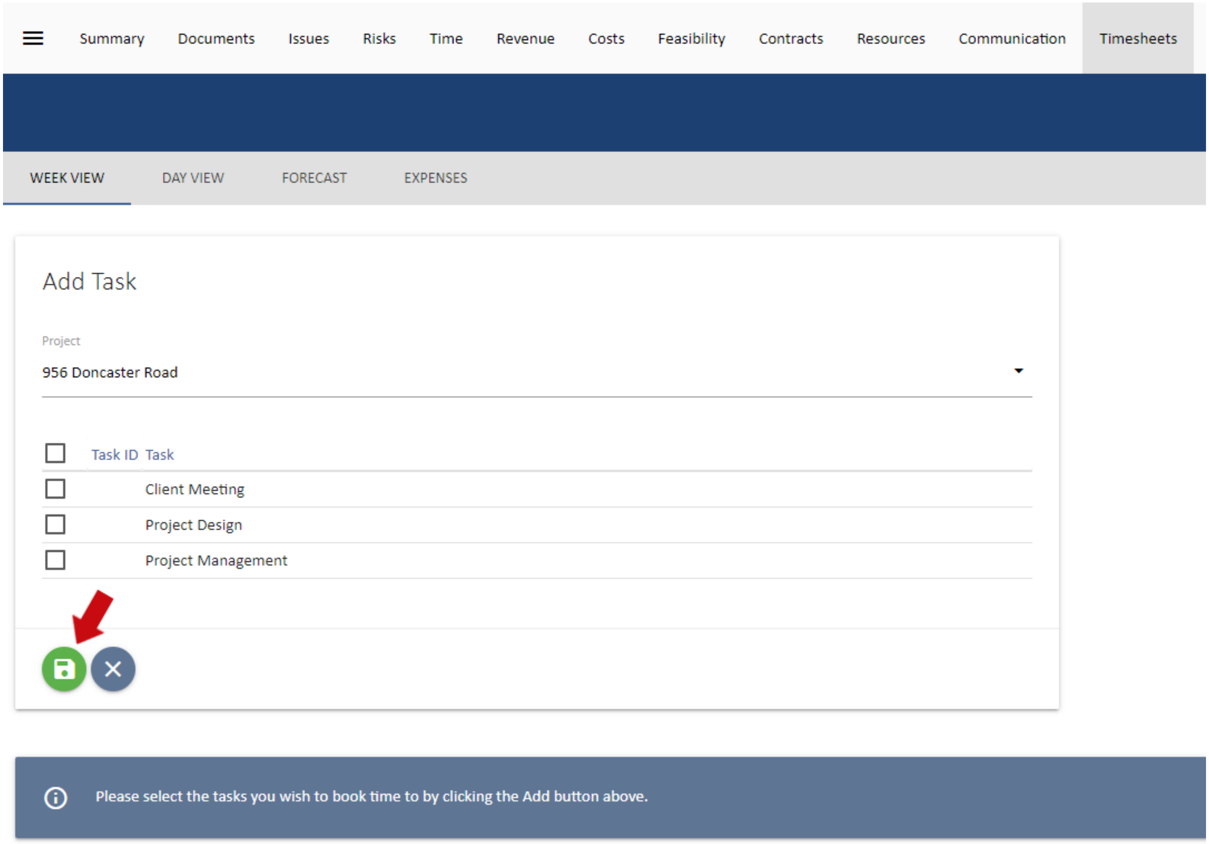


1. Select someone else from the list to enter or amend an open timesheet for the displayed week.
2. Select the Add button, to search for a WBS activity to add to the timesheet.

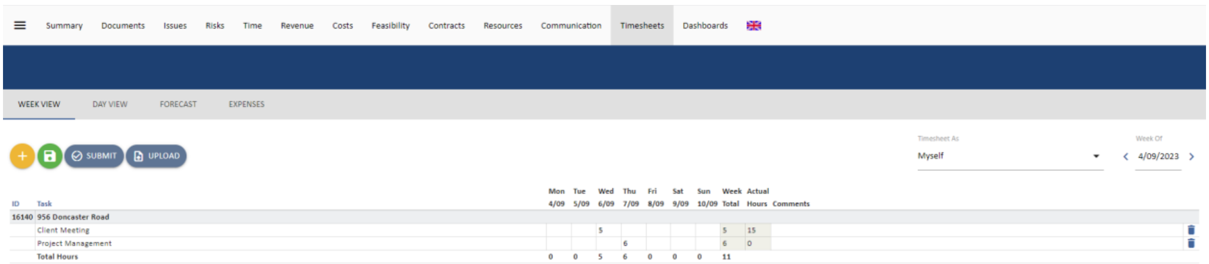


3. The timesheet code/Task ID will appear. Check the box next to the relevant task to save it to the list of codes in the time sheet.

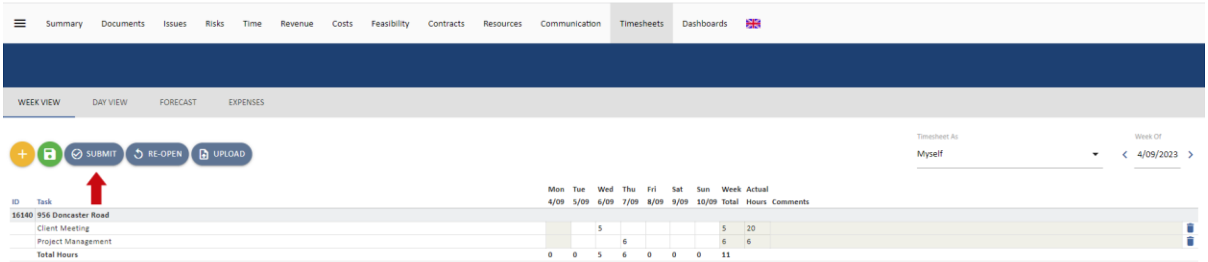




4. Enter the relevant time.



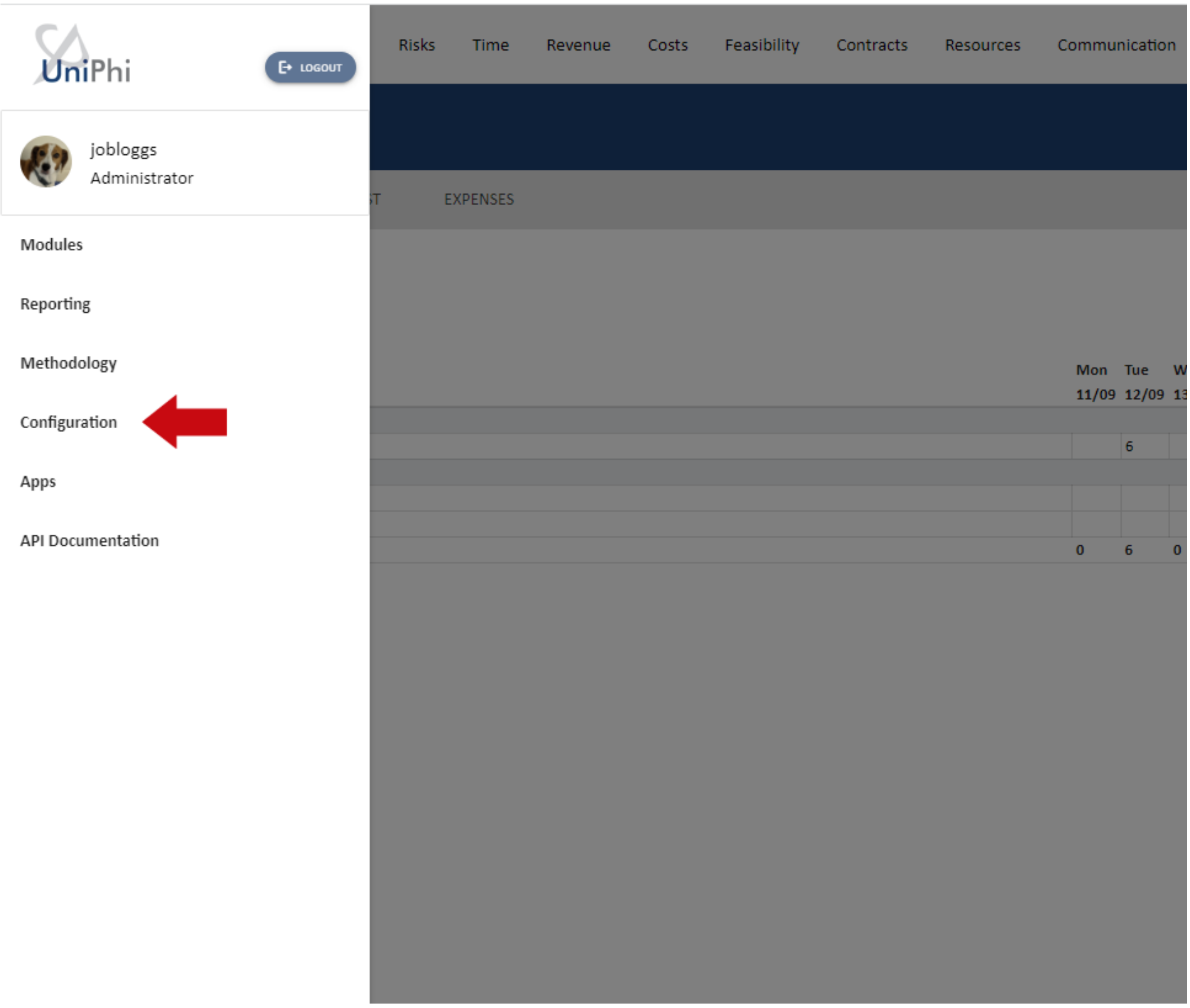
5. Select Submit to submit the timesheet for that week. The view will display greyed-out cells for submitted timesheets.

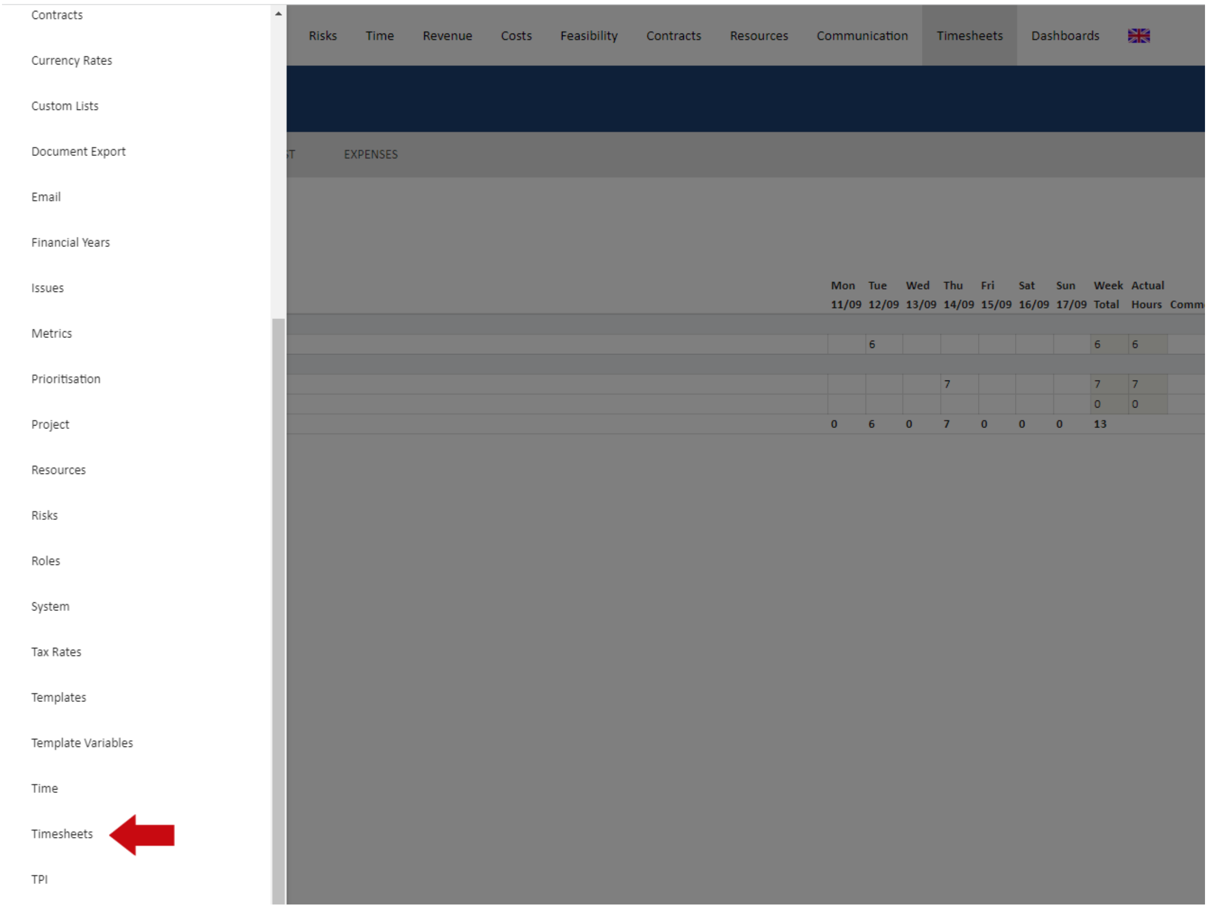


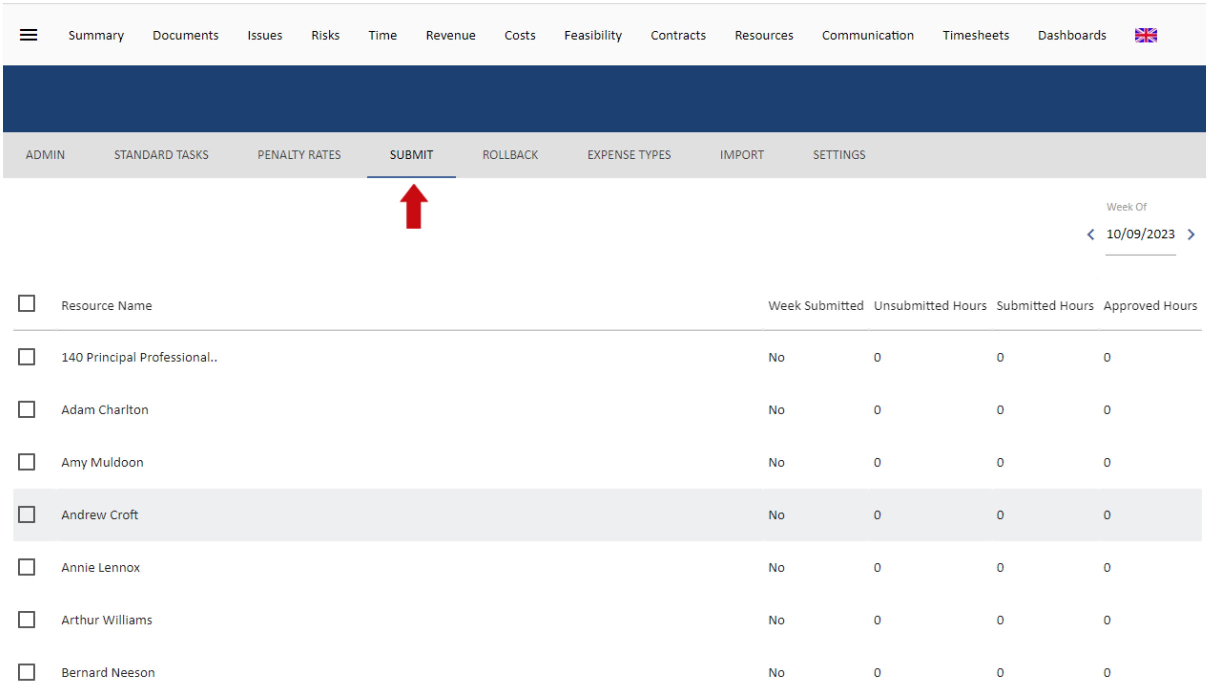
If a team member does not appear in the list for "Timesheet As" it will be because they are linked to a different organisation or they have not had a UniPhi license assigned to them.

Submit Timesheets

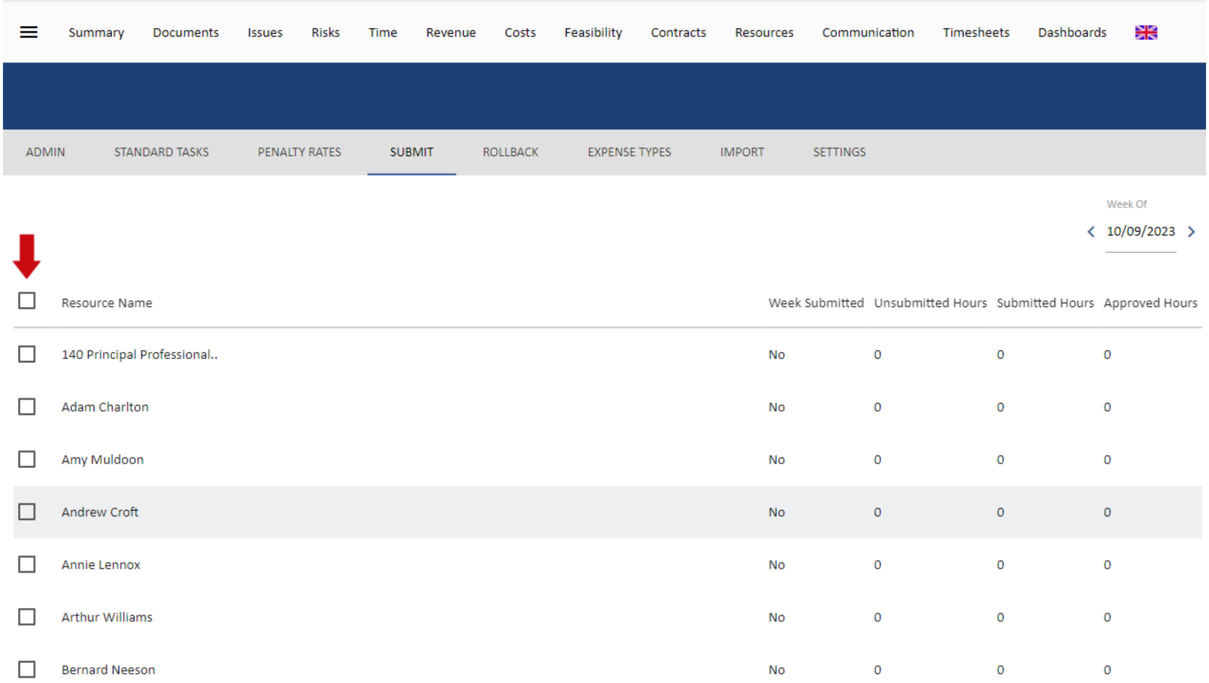
As a Timesheet Administrator, you can submit timesheets on behalf of users in your organisation, across all WBS codes for a particular week. Under Configuration > Timesheets > Submit, you can see the list of users. Against which, their submission status will be displayed, together with the total submitted and “unsubmitted” hours.



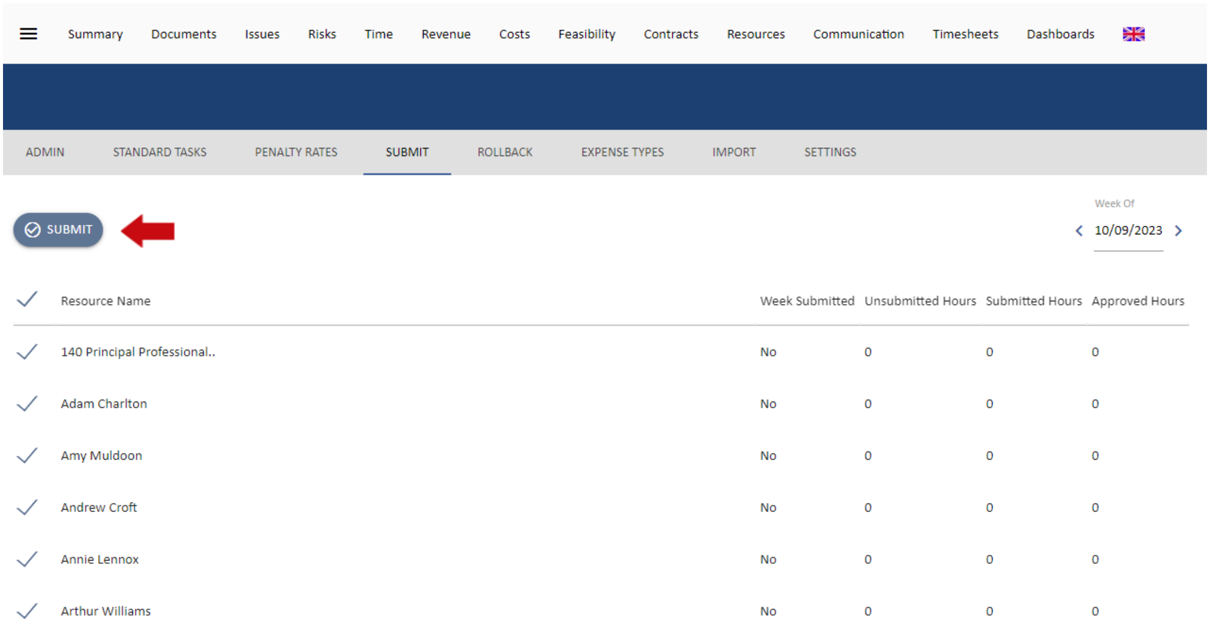




1. Check the box next to a name to select one user or check the box at the top of the list for all users. The Submit icon will appear.

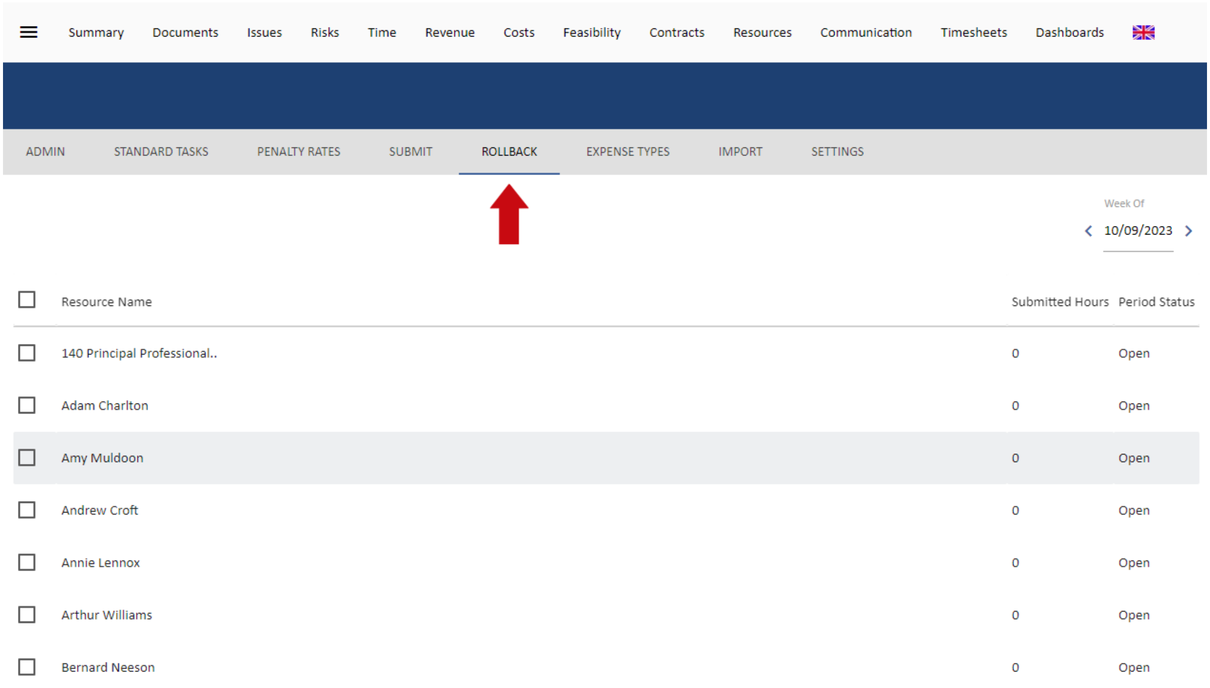


2. Select Submit and all the open timesheets a for that week will change to the Submitted status

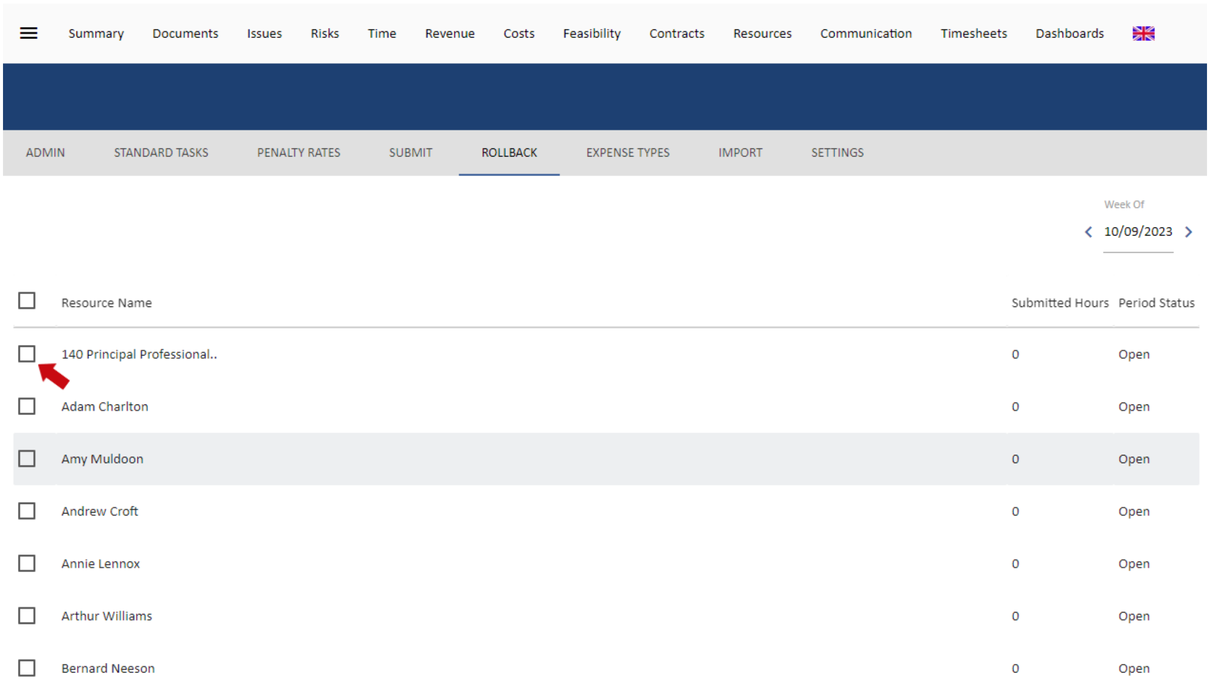


Roll Back Timesheets

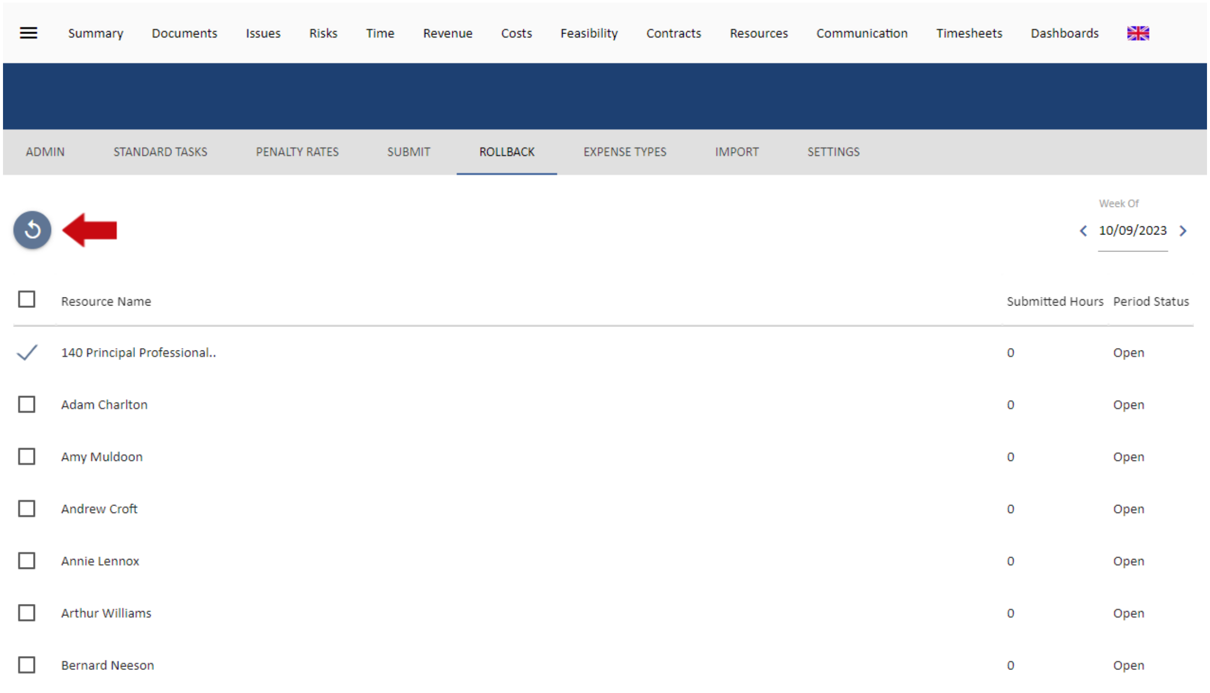
Occasionally a Timesheet may need to **Rollback** (the Team member may have missed a day, entered incorrect hours, used the wrong task, etc.). A Timesheet Administrator can reopen time sheets for users in their organisation.



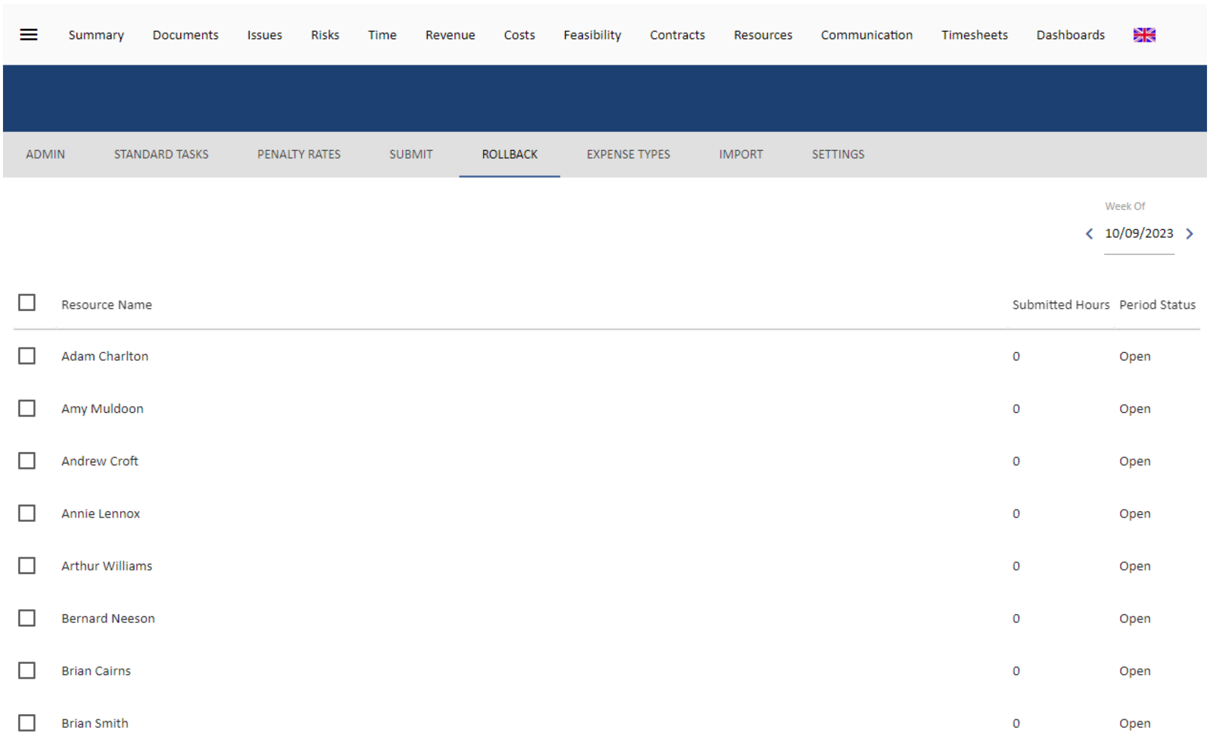
1. The RollBack view shows who has submitted timesheets for the selected week. Check the box next to the people who need to have their timesheets rolled back.



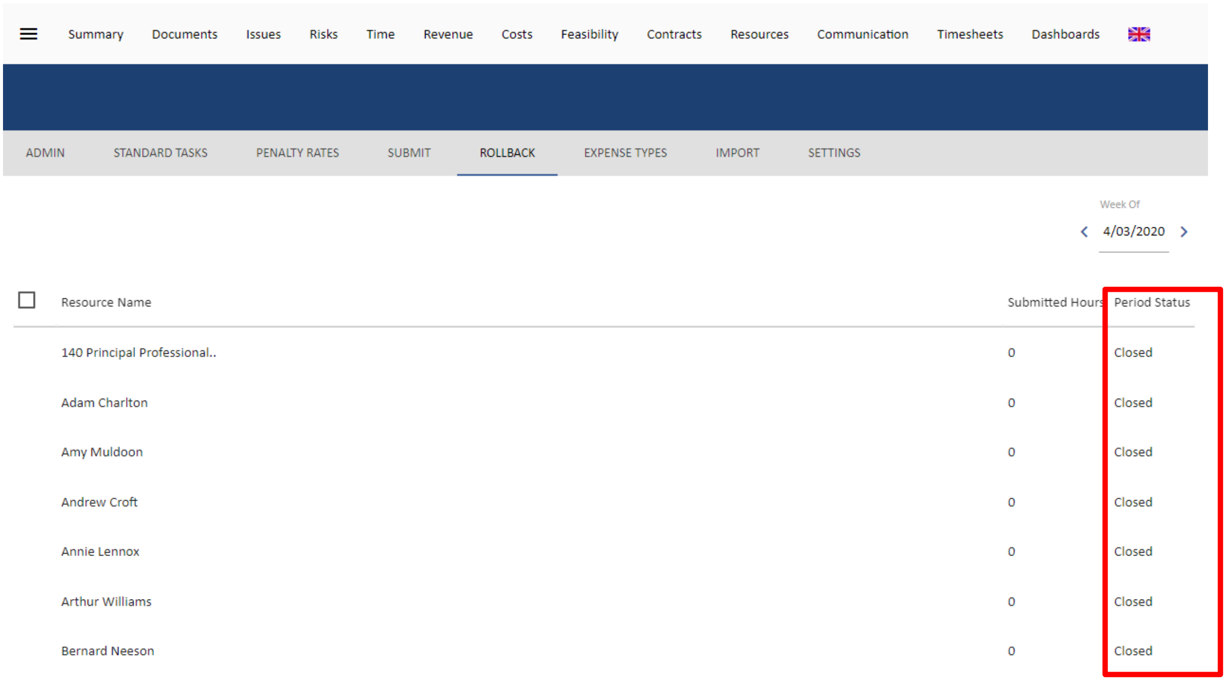
2. Select the RollBack button to reopen those timesheets. Note this will open up all timesheets from the date you select and onwards. If it the Week Of selected is 2 weeks ago, the last two weeks will be reopened.



3. The people whose timesheets have been rolled back will disappear from the list.

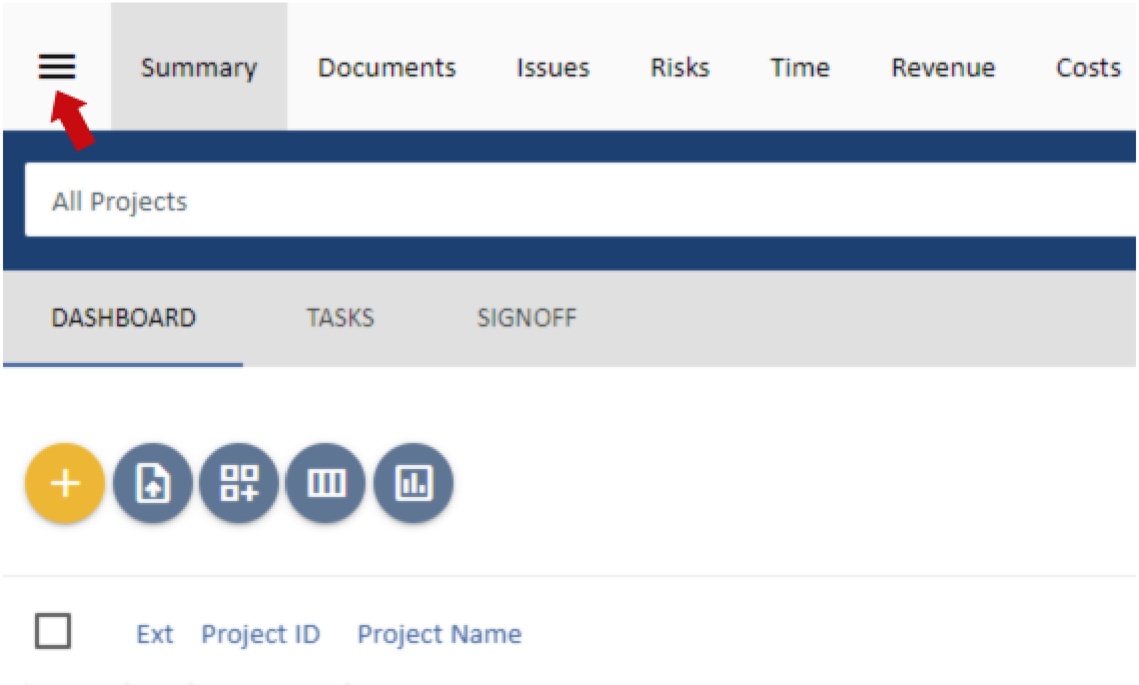


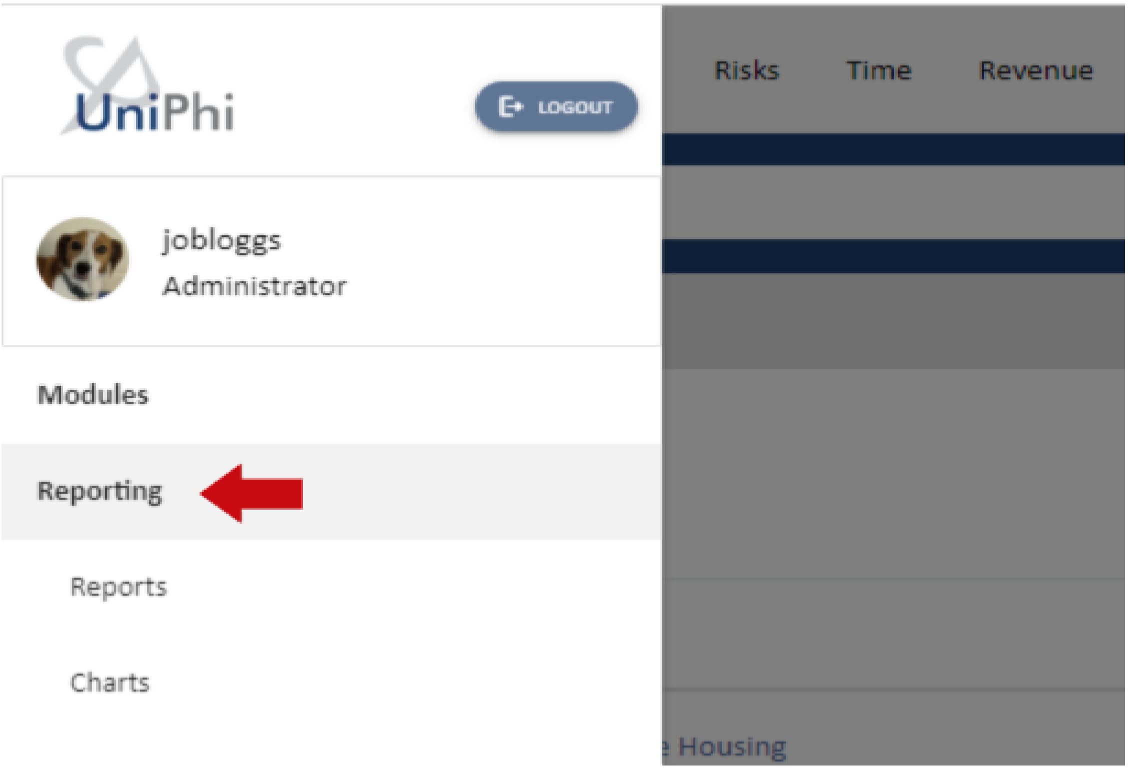
If you go back to closed financial periods, the Period Status field will say “Closed” and you will not be able to Rollback timesheets for those periods. If a time sheet needs to be entered or amended, you will need to request that the financial period to be reopened by a System Administrator.



Reports

Timesheet Data entered into UniPhi can be viewed and extracted to an MS Excel file via UniPhi’s Reports module. The Reports module is available from the UniPhi menu in the top left of the application, under Reporting > Reports.





Two reports are available:

- Timesheet Export – a line by line export of the time sheet data in a flat format
- Timesheet Audit – shows changes to the time sheet data from a selected status date.