



UniPhi 19

**Timesheets for
Team Members
Training Manual**



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Course Aim

The aim of this manual is to provide instructions for any Team Member that is required to enter Timesheet data to the UniPhi system. A separate manual addresses Administration tasks for Project Managers and System Administrators.

How to use this User Training 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 out of trouble.



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.

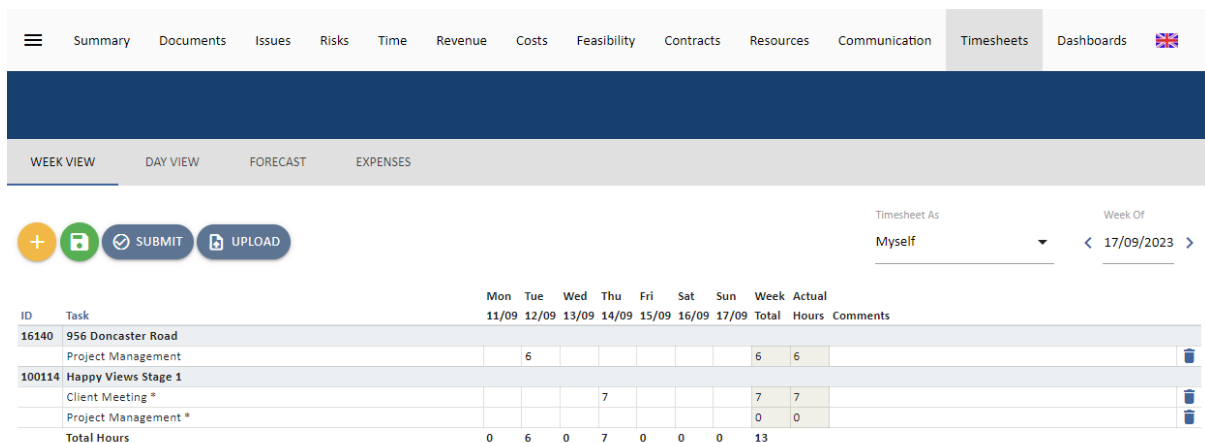
Screenshots have been used throughout the manual to demonstrate what you should be viewing as you move through the activities. They are for illustrative purposes only. Details such as dates, budget figures and other entered text/data may vary.

Timesheets for Team Members

The use of Timesheet system supports several aspects of UniPhi:

- Where timesheet entries align to a contract on a project the submitted hours support calculating progress claims against the contract.
- Project Costs and implicitly Profit calculations can be reported.
- Resource Planning for the organisation uses Actual Hours submitted on projects to calculate the remaining budget hours and make adjustments for estimates at completion.
- Provides data for the team Utilisation calculations.
- Ultimately this data supports the organisation analysis of effort expended.

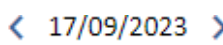


The Timesheet view is as follows:




ID	Task	Mon 11/09	Tue 12/09	Wed 13/09	Thu 14/09	Fri 15/09	Sat 16/09	Sun 17/09	Week Total	Actual Hours	Comments
16140	956 Doncaster Road			6					6	6	
	Project Management			6					6	6	
100114	Happy Views Stage 1				7				7	7	
	Client Meeting *				7				7	7	
	Project Management *								0	0	
	Total Hours	0	6	0	7	0	0	0	13		

When selected, the filter option disappears as it is not relevant to the Timesheet module.

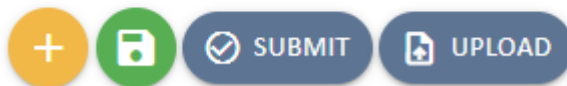
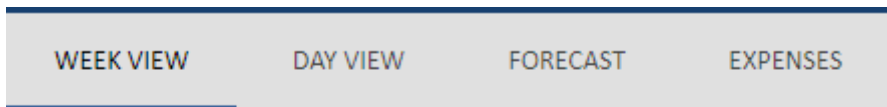
There are a number of fields and controls presented:

- “Week of”: will default to the last day of the week that is yet to be submitted for the team member.
-  : the “<” and “>” move backward or forward a Week or Day to depending on the selected view.
-  Provides for the selection of a project to add to the Timesheet.
-  Allows the team member to save the entries and date entered to the system. Saved data can be edited, changed, or removed at any time prior to submitting.

-  Commits the Timesheet to the system, updating the Work in Progress for the relevant projects and closing the Timesheet from editing.
- “Scheduled End Date”: is only for Timesheet Contract Deliverables and Variations that are assigned to the Team Member. It shows the end date of the deliverable.
- “Remaining Work”: is only for Timesheet Contract Deliverables that are assigned to the Team Member. It shows the hours left for the deliverable; this can be updated by the Team Member.

The sub-navigation options in the grey menu allow access to the following:

- “Week View”: is the standard timesheet view and shows the timesheet for the week of the selected date.
- “Day View”: changes the view to a single day.
- “Forecast”: access the timesheet forecast function.
- “Expenses”: access UniPhi’s expense management function (this is explained in another manual).

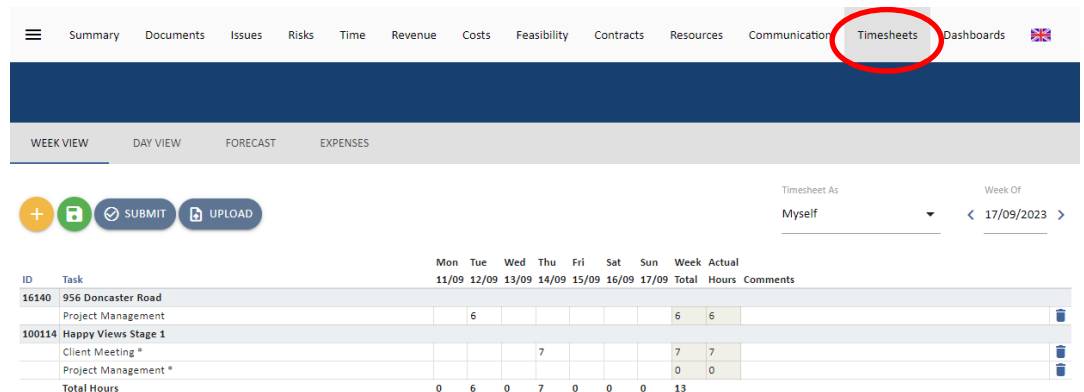


The following pages describe a step-by-step process for managing timesheets.




Adding Projects to your Timesheet

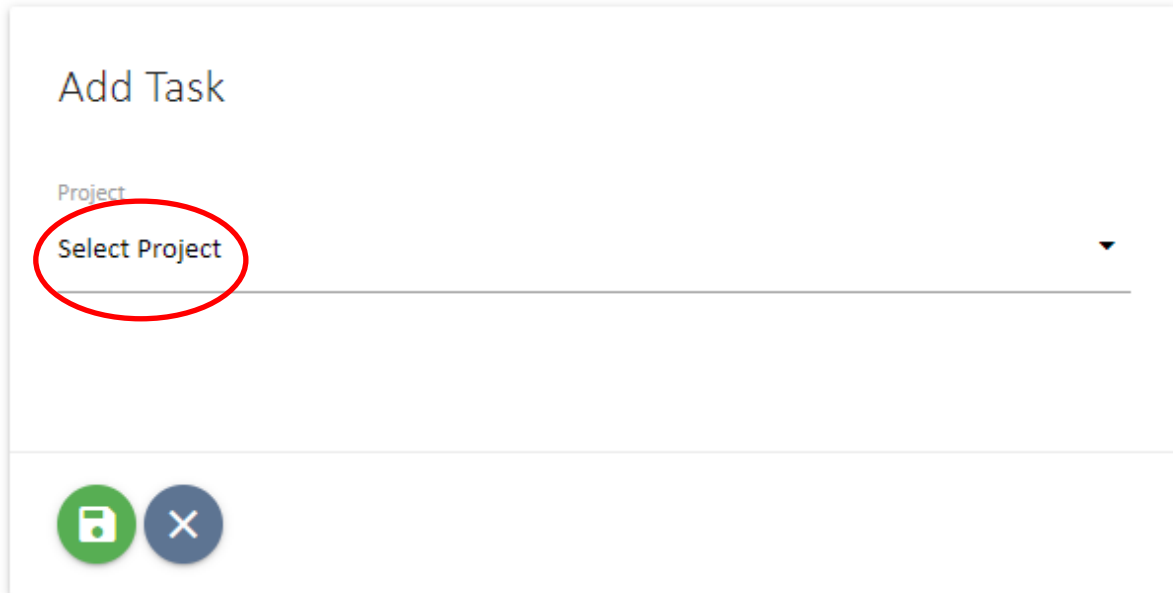
Select *Timesheets*



The screenshot shows the UniPhi navigation menu with 'Timesheets' highlighted. Below the menu is a sub-navigation bar with 'WEEK VIEW', 'DAY VIEW', 'FORECAST', and 'EXPENSES'. Below that are action buttons: '+', 'Save', 'SUBMIT', and 'UPLOAD'. The main content area shows a timesheet table for 'Myself' for the week of 17/09/2023.

ID	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Week	Actual	Comments
		11/09	12/09	13/09	14/09	15/09	16/09	17/09	Total	Hours	
16140	956 Doncaster Road			6					6	6	
	Project Management										
100114	Happy Views Stage 1										
	Client Meeting *				7				7	7	
	Project Management *								0	0	
	Total Hours	0	6	0	7	0	0	0	13		

Click on the  icon.



Select the Project you want to add to your timesheet from the **Add Task:** field. You can either type the project name to search for it or select the project from the drop-down list.





Project Resources: Only projects that you are assigned to will appear in the drop-down filter of the timesheet. If you have worked on a project that you are not yet assigned to, go to the *Portfolio > Resources* tabs and add yourself to the project. If you are not authorised to add yourself as a resource, please raise this with the designated Project Manager.


If a Standard Task List has been specified for the project, a **Tasks** checklist will appear. You can use this to add selected tasks from the **Tasks** list. If a Task List is assigned, you must select at least one task. Select as many tasks or assignments as required using the checklist.

Add Task

Project
- A406 Hangars Lane - Concept Design

<input type="checkbox"/>	Task ID	Task	Start Date	End Date	Scheduled	Remaining
<input checked="" type="checkbox"/>		Concept design	05 Aug 2020	18 Sep 2020	80 Hours	72 Hours
<input type="checkbox"/>		Client Meeting				
<input checked="" type="checkbox"/>		Project Design				
<input type="checkbox"/>		Project Management				


 

Click the  icon. The **Project** and selected task and assignments will now be listed in the timesheet view.

Summary Documents Issues Risks Time Revenue Costs Feasibility Contracts Resources Communication Timesheets Dashboards																	
WEEK VIEW DAY VIEW FORECAST EXPENSES																	
Timesheet As: Myself Week Of: 17/09/2023																	
ID	Task	Scheduled End Date	Mon 11/09	Tue 12/09	Wed 13/09	Thu 14/09	Fri 15/09	Sat 16/09	Sun 17/09	Week Total	Actual Hours	Remaining Hours	Total Hours	Scheduled Hours	Variance	Progress	Comments
16140	956 Doncaster Road			6						6	6						
	Project Management																
100111	A406 Hangars Lane - Concept Design																
	Concept design	18 Sep 2020								0	8	72	80	80	0		
	Project Design									0	0						
100114	Happy Views Stage 1																
	Client Meeting *				7					7	7						
	Project Management *									0	0						
	Total Hours		0	6	0	7	0	0	0	13							

The screenshot shows the result of adding two projects to a Timesheet with a standard task and a contract deliverable assignment selected. Contract deliverable assignments are in blue. Standard tasks have no Scheduled End Date.

Scheduled End Dates only appear where a Contract Deliverable is assigned and has had a schedule added to it on the Contract.

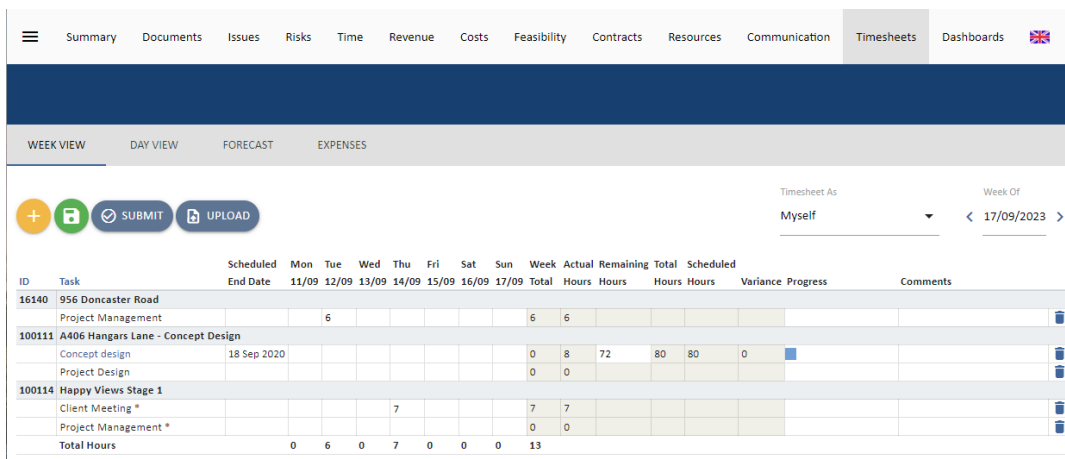
The  at the far right of the line indicates that this item could be removed from the Timesheet if it is incorrectly selected.

If there is no Standard Task List assigned to the project, the Tasks selector will not appear. This indicates that the project is not available for timesheets.

Timesheet Week vs Day View

The default setting for UniPhi Timesheets is to display the week that requires submitting. Assuming that the team member is pro-active, this should be the current working week.

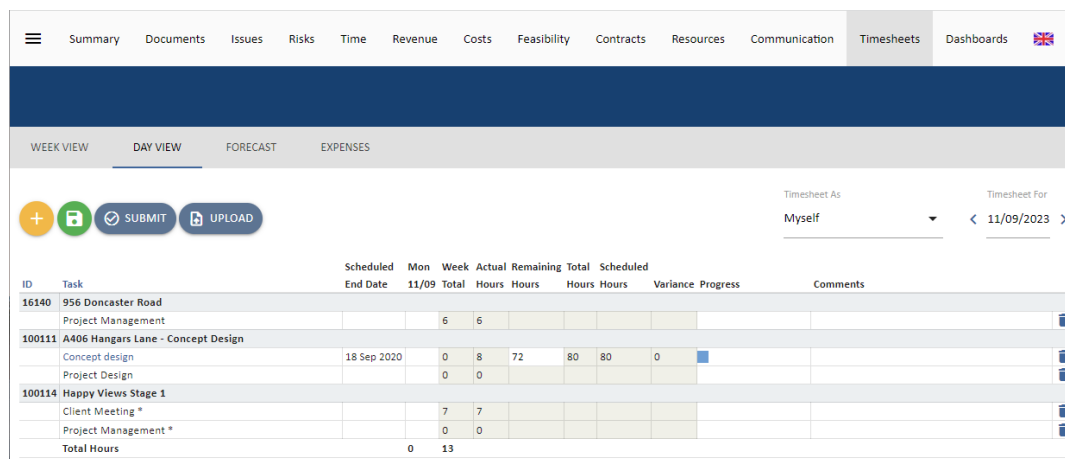
The Week view presents a full 7 days while the Day view focuses on a specific day.



The screenshot shows the 'WEEK VIEW' of a timesheet. The interface includes a navigation menu at the top with 'Timesheets' selected. Below the menu are tabs for 'WEEK VIEW', 'DAY VIEW', 'FORECAST', and 'EXPENSES'. The main area displays a table with columns for 'ID', 'Task', 'Scheduled End Date', days of the week (Mon-Sun), 'Week Total', 'Actual Hours', 'Remaining Hours', 'Total Scheduled Hours', 'Variance', 'Progress', and 'Comments'. A trash icon is visible at the end of each row.

ID	Task	Scheduled End Date	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Week Total	Actual Hours	Remaining Hours	Total Scheduled Hours	Variance	Progress	Comments
16140	956 Doncaster Road			6						6	6					
	Project Management			6						6	6					
100111	A406 Hangars Lane - Concept Design															
	Concept design	18 Sep 2020								0	8	72	80	80	0	
	Project Design									0	0					
100114	Happy Views Stage 1															
	Client Meeting *					7				7	7					
	Project Management *									0	0					
	Total Hours		0	6	0	7	0	0	0	13						

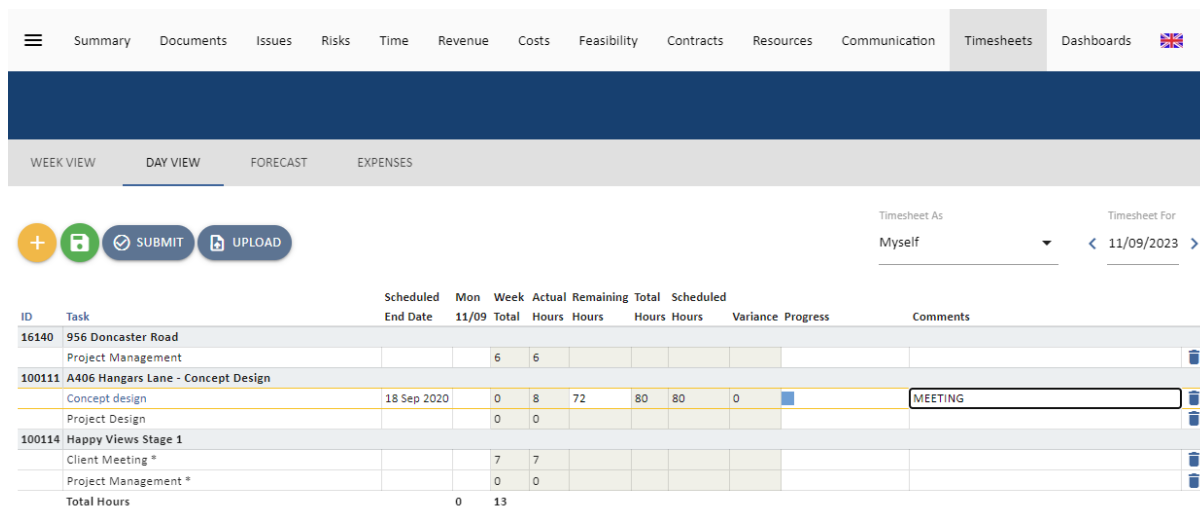
The Day View provides for entry of time data and for Comments or notes about the activities undertaken. The Comments field will hold 256 characters although only about 40 are displayed depending on your screen resolution.



The screenshot shows the 'DAY VIEW' of a timesheet. The interface is similar to the week view but focuses on a single day. The table columns are adjusted to show 'Mon' and 'Week Total' instead of individual days. A trash icon is visible at the end of each row.

ID	Task	Scheduled End Date	Mon	Week Total	Actual Hours	Remaining Hours	Total Scheduled Hours	Variance	Progress	Comments
16140	956 Doncaster Road			6	6					
	Project Management			6	6					
100111	A406 Hangars Lane - Concept Design									
	Concept design	18 Sep 2020		0	8	72	80	80	0	
	Project Design			0	0					
100114	Happy Views Stage 1									
	Client Meeting *			7	7					
	Project Management *			0	0					
	Total Hours		0	13						

The same Timesheet is shown below except that the Project Manager has selected “Require Comments” for all project timesheet entries. This is signified by the asterisk * against each task.



ID	Task	Scheduled End Date	Mon 11/09	Week Total	Actual Hours	Remaining Hours	Total Hours	Scheduled Hours	Variance	Progress	Comments
16140	956 Doncaster Road			6	6						
	Project Management										
100111	A406 Hangars Lane - Concept Design										
	Concept design	18 Sep 2020	0	8	72	80	80	0			MEETING
	Project Design		0	0							
100114	Happy Views Stage 1										
	Client Meeting *		7	7							
	Project Management *		0	0							
	Total Hours		0	13							

In order to submit the timesheet, a comment must be entered for each line item with the asterisk. Comments can be entered in Week or Day views.

The Save and Submit options work similarly in both views saving or submitting the selected data as one day or one week.

An attempt to Submit a timesheet that has an empty comment where a comment is required will be rejected.



You can select the timesheet Date using [< 17/09/2023 >](#) the icon. You can scroll back to a previous week/day by selecting “<” or scroll ahead by selecting “>”.

Entering Hours

Projects can be added to the Timesheet at any time prior to submitting the Timesheet. Additional Standard Tasks can be added by adding the project again and selecting the required option from the Tasks selector. Ensure that the **Date** for the week or day you wish to timesheet against has been selected correctly.

+ 📁 🔄 SUBMIT 📄 UPLOAD Timesheet As: Myself Week Of: 17/09/2023																	
ID	Task	Scheduled End Date	Mon 11/09	Tue 12/09	Wed 13/09	Thu 14/09	Fri 15/09	Sat 16/09	Sun 17/09	Week Total	Actual Hours	Remaining Hours	Total Hours	Scheduled Hours	Variance	Progress	Comments
16140	956 Doncaster Road			6						6	6						
	Project Management			6						6	6						
100111	A406 Hangars Lane - Concept Design																
	Concept design	18 Sep 2020	5	6	7	8	9			35	8	37	80	80	0	<div style="width: 100%;"></div>	11/09: MEETING
	Project Design									0	0						
100114	Happy Views Stage 1																
	Client Meeting *				7					7	7						
	Project Management *									0	0						
	Total Hours		0	11	6	14	8	9	0	48							

Enter in the hours you worked on projects for each day. Note that the hours are automatically tallied up to give the total hours worked for that day and week.

Hours can be entered as decimal hours. UniPhi recommends minimising the complexity by sticking with increments of 30 minutes or .5 hours as an adequate level of detail. However, your organisation may vary and utilise for example .1 to .9 reflecting 6-minute increments.

You can enter comments against the day or week view. The day view will mean your comment reflects a particular day rather than a whole week.

+ 📁 🔄 SUBMIT 📄 UPLOAD Timesheet As: Myself Timesheet For: 11/09/2023																
ID	Task	Scheduled End Date	Mon 11/09	Week Total	Actual Hours	Remaining Hours	Total Hours	Scheduled Hours	Variance	Progress	Comments					
16140	956 Doncaster Road			6	6											
	Project Management			6	6											
100111	A406 Hangars Lane - Concept Design															
	Concept design	18 Sep 2020	5	43	37	80	80	0	<div style="width: 100%;"></div>		MEETING					
	Project Design			0	0											
100114	Happy Views Stage 1															
	Client Meeting *			7	7											
	Project Management *			0	0											
	Total Hours		0	48												

To save your hours, select the  icon.



Note that once you have entered hours and saved them these hours will be available to report on project progress (although these will be identified as 'Entered' hours, not 'Submitted' hours).

Submitting Your Timesheet



When the Timesheet is completed for the day or week it can be submitted. Timesheets must be submitted sequentially. The Submit option will only appear for the Week or Day that is next in sequence. Submitting a Timesheet locks the entries and disables editing or changes to a Timesheet.

Are you sure you wish to submit all timesheets up to and including 17 Sep 2023?



It is easier to Submit from the Day view directly so that each day is checked for comments. Submitting a Timesheet at the Week or Day View with no hours or all zeroes is accepted in UniPhi.

If there is a task that requires comments but it has not been completed, a message “Unable to submit: Tasks marked with an asterisk (*) require comments” will appear.



You are able to view submitted timesheets by using the [17/09/2023](#) navigation buttons. Submitted timesheets will be greyed out and only weeks will be viewable. Selecting Day View will return from the submitted Timesheet to the next Day that is to be submitted. The history of Daily information can be viewed via

Timesheet Reports, if you have access.

Rolling Back Timesheets

Occasionally a Timesheet may need to **Rollback** (the Team member may have missed a day, entered incorrect hours, etc.). Only UniPhi users with **System Administrator** or **Timesheet Administrator** access are authorised to rollback submitted timesheets.

While an Administrator may be able to roll back a Timesheet, this can only be done within the current financial period. Once a financial period is closed, timesheets within that period cannot be rolled back.

A suggested process is to log an Issue in UniPhi against an Administrative project and assign it to the relevant System Administrator. This maintains a record of roll backs and will assist with debugging any errors made during the process.

Rolling back timesheets may impact on Work in Progress for a project if it is done without consideration for the flow on effects.



A Rollback of a timesheet will also re-open all subsequent timesheets.

This is because timesheets must be submitted sequentially. When this occurs, data is not lost. Amend the incorrect timesheet, and then re-submit all the timesheets to return to the current period.