Sentrifugo

open source HRMS

3.0 User Guide

Sentrifugo – Time Management

User Guide

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Introduction

Sentrifugo's Time Module is a unique Timesheet Management tool. Managers can configure project details and add Employees to projects. They can view timesheets of the Employees reporting to them in a daily, weekly or monthly view format. Employees can enter the hours spent on an assigned project. Employee and project based time reports can be generated based on the details entered by the Employees.

Time Management Settings Configuration

Before your Employees can start filling the timesheets, as a Super Admin you must configure the following aspects:

- Add Clients
- Add Projects
- Add Default Tasks
- Configuration
  - Weekly Submission Reminder
  - Timesheet Blocking Range

How do I add Clients?

Provide the basic information about your clients.

Select the option Clients from the Time module's menu. Click on the + Add button.

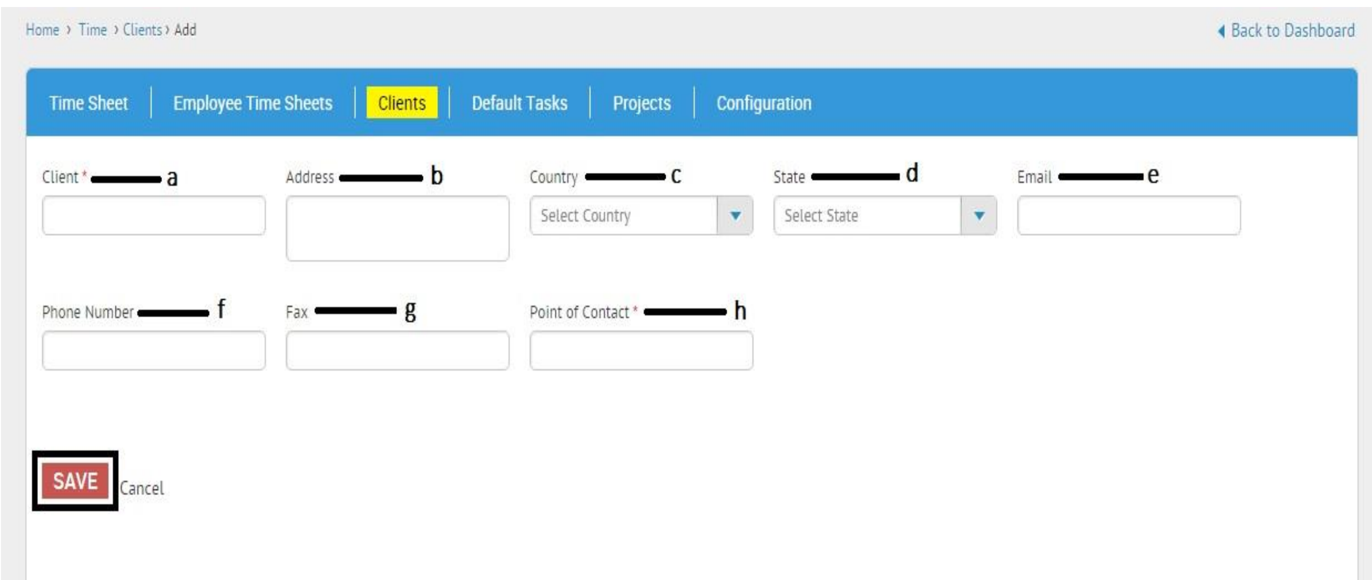


Figure 1

* - Denotes mandatory fields

a. Client name*

b. Client location
c. Country the client is located in
d. State the client is located in
e. Client email address
f. Client phone number
g. Client fax number
h. Name of the point of contact from client side*

How do I add Projects?

Under the 

section there are 3 steps:

1. Configure project details: Provide information about the project.

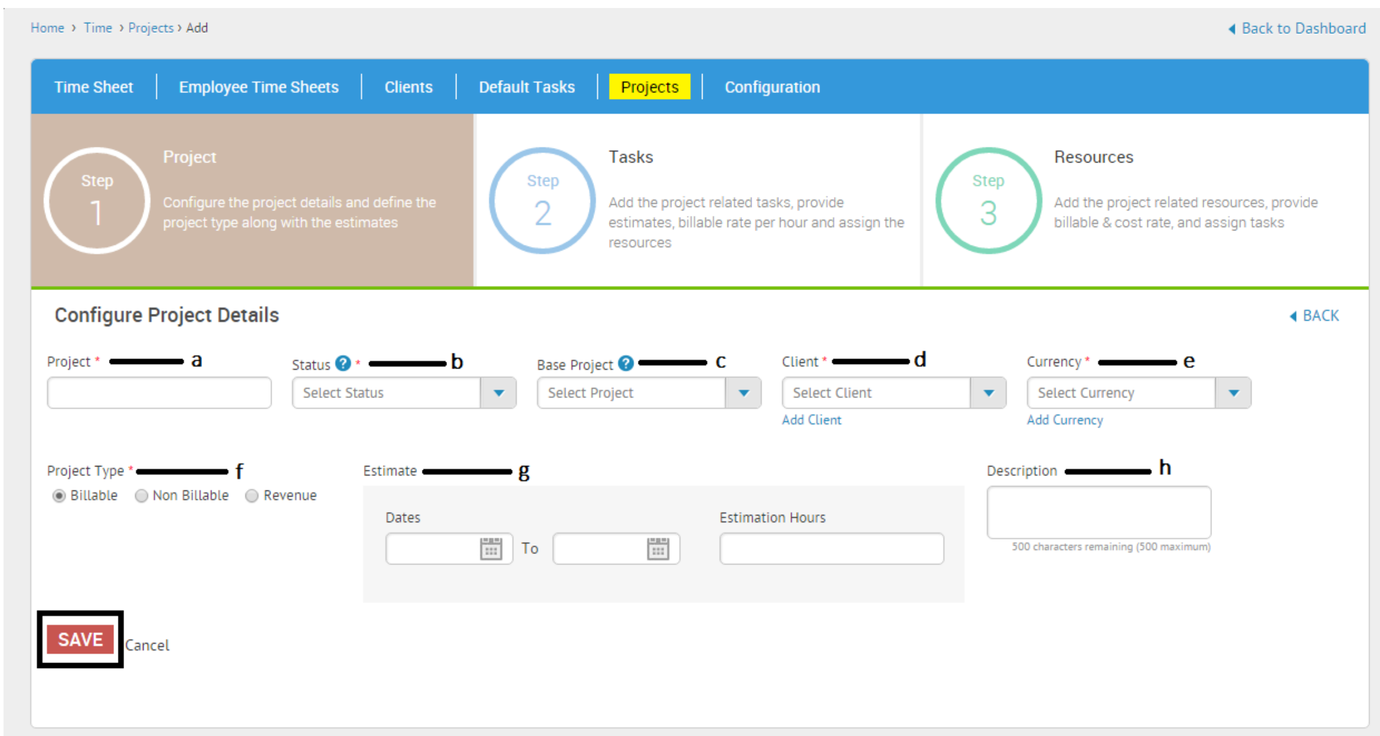


Figure 2

* - Denotes mandatory fields

a. Project Name*

b. Status of the Project E.g.: Initiated, In Progress, Completed etc.*
c. The parent project name on which the current project is based on
d. Client Name*
e. Currency used in the project*
f. Type of the project on basis of the income type*
g. Estimated duration of the Project
h. Project Description

SAVE the details to move onto the next step.

2. Add Project related tasks: Add the various tasks which are performed by the Employees in the project

When you are configuring a task for the first time, you will see the below message:

After clicking on the hyperlink, a pop up window will open.

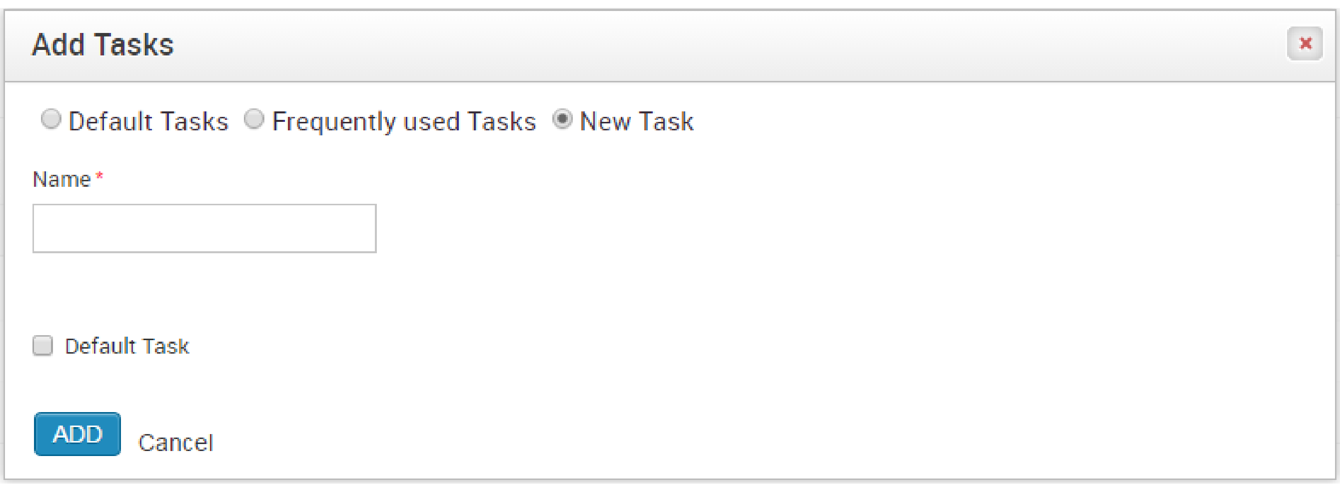


Figure 2.1

- Default Tasks - The default tasks that had been set up in the 'Default Tasks' tab (you can create a default task here also by selecting the checkbox 'Default Task' while creating a new task)
- Frequently Used Tasks - The tasks frequently used in different projects will be populated here
- New Task – For a particular project only, a new task can be added here

Choose the task category you want by selecting the radio button.

You can then fill in the Estimated Hours and Billable Rate of each task which you have added.

Figure 2.2

3. Add resources to Projects: You can add Managers/Employees to the project. When you are adding resources for the first time you will see the below message.

After clicking on the hyperlink, a pop up window will open.

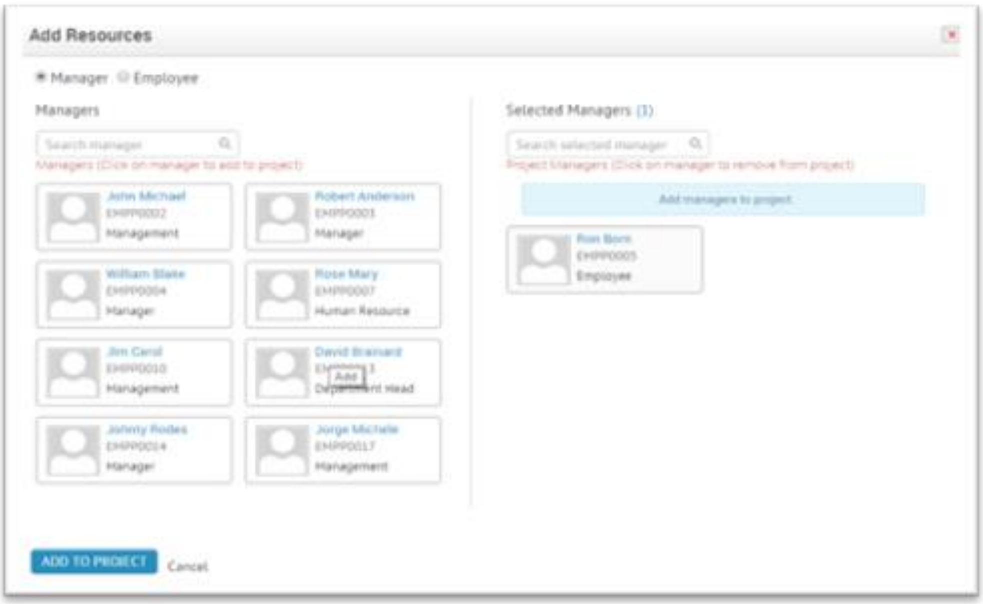


Figure 2.3

Click on the Manager/Employee you wish to add to the project and then the name will appear on the right side column as selected Managers/Employees. Click on ADD TO PROJECT

After the resources have been added the Super Admin/Manager can fill in the billable rate & cost rate.

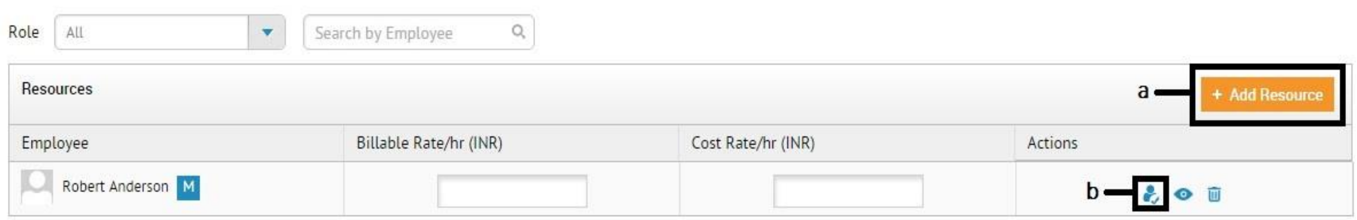


Figure 2.4

a. Add more resources
b. Assign tasks to resources and on clicking this option a pop up (shown below) window will open.

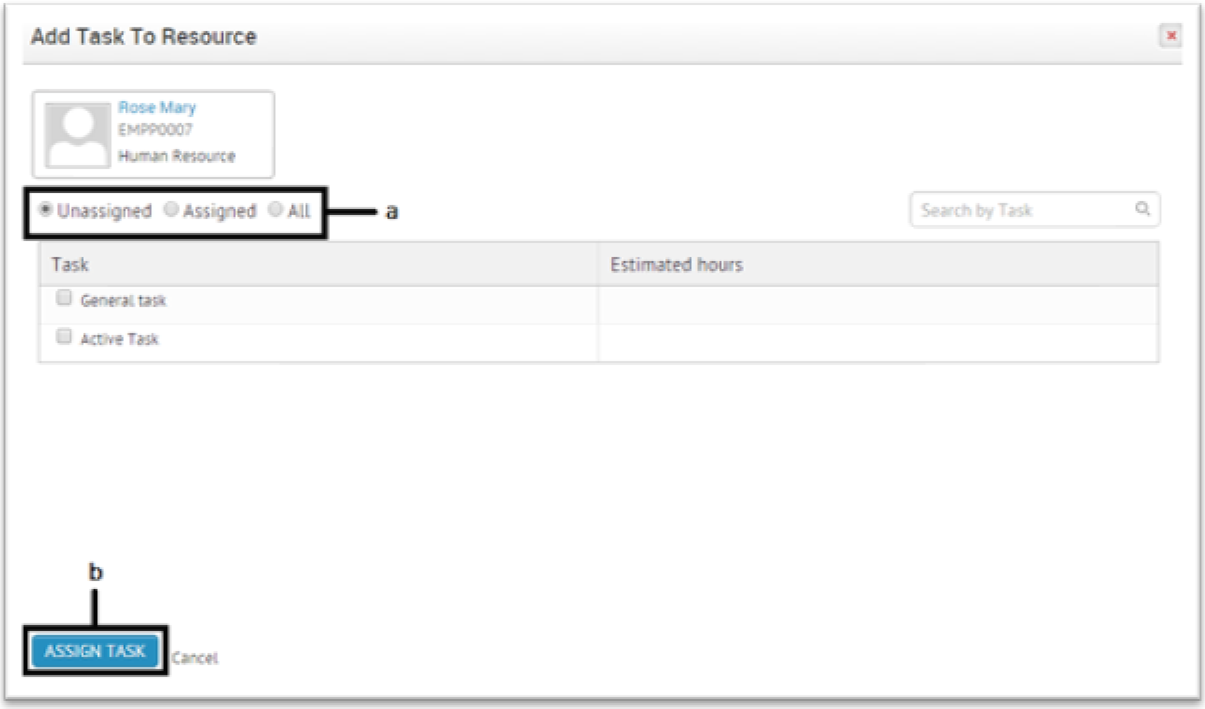


Figure 2.5

a. You can filter the tasks displayed by clicking on a radio button (Unassigned/Assigned/All)

b. After selecting the tasks you wish to assign to the resource, click on ASSIGN TASK

How do I add Default Tasks?

Add the various default tasks performed by the Employees in your organization. E.g.: Developing, Documentation, Testing etc.

Select the option Default Tasks from the Time module's menu. Click on the + Add button.

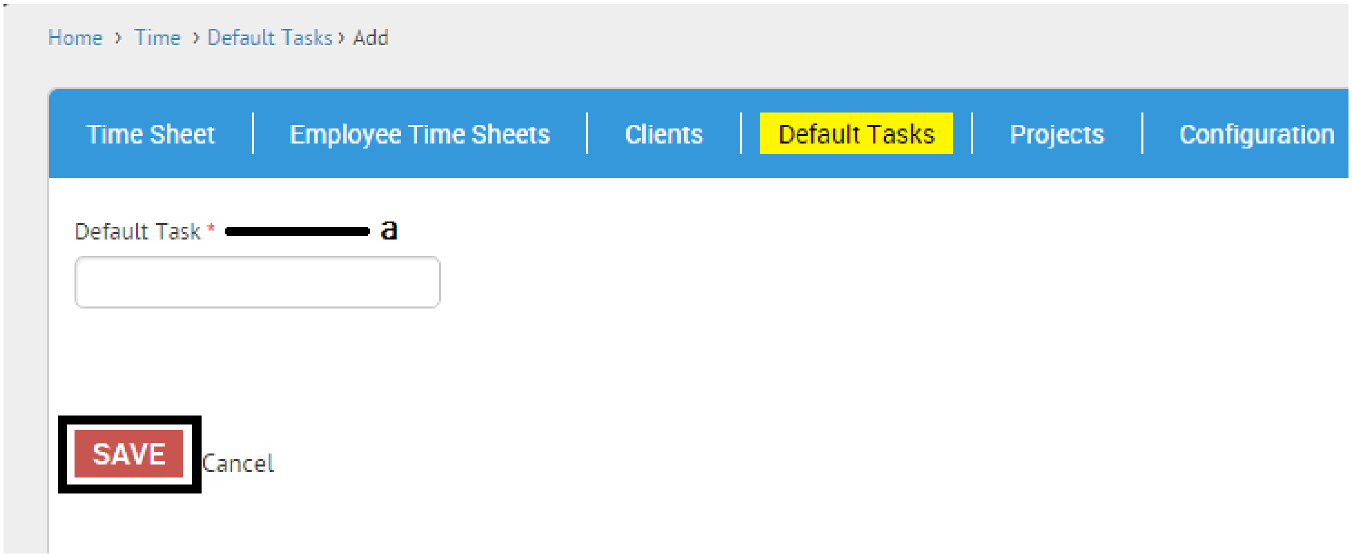


Figure 3

* - Denotes mandatory fields

a. Enter the various default tasks existing in your organization one by one and SAVE each task* (default tasks are not editable but can be deleted if not assigned to any Employee)

How do I configure the weekly reminder and timesheet blocking range?

Weekly Submission Reminder

Set a day in a week to send email notifications to your workforce to remind them about filling their timesheets and sending them for approval.

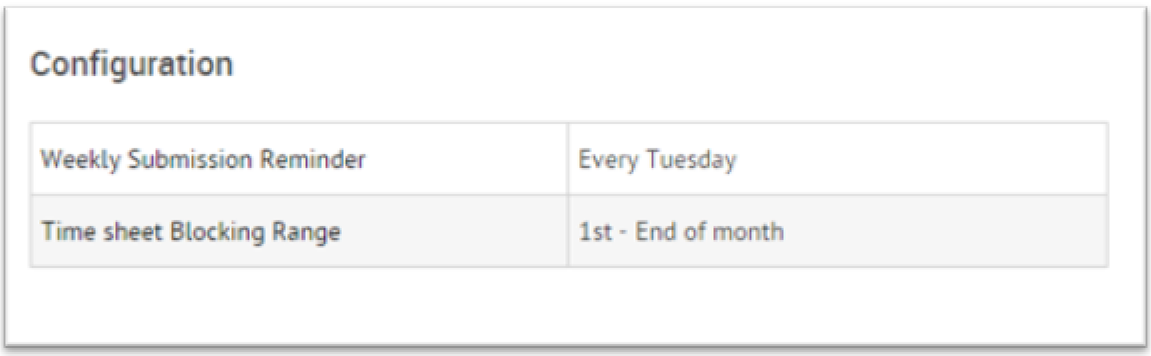
Timesheet Blocking Range

Define a time period within which the Employees' timesheet will be blocked for a month. Sentrifugo offers you two options to accomplish this feature:

- 1 - End of month
    - By the end of every month, all Employees must submit their timesheets

- Two days of grace period i.e. 1st and 2nd of the next month, are provided to the Employees to submit their timesheets. On the 2nd of every month, a notification will be sent as a reminder about blocking the timesheet.
- On the 3rd of every month, if the Employees have not submitted their timesheets, their previous month's timesheet will be blocked.

- 26th previous month - 25th next month
  - By the 25th of every month, all Employees must submit their timesheets.
  - Two days of grace period i.e. 26th and 27th of the next month, are provided to the Employees to submit their timesheets. On the 27th of every month, a notification will be sent as a reminder about blocking the timesheet.
  - On the 28th of every month, if the Employees have not submitted their timesheets, their previous month's timesheet will be blocked.


Configuration

Weekly Submission Reminder	Every Tuesday
Time sheet Blocking Range	1st - End of month

Figure 4

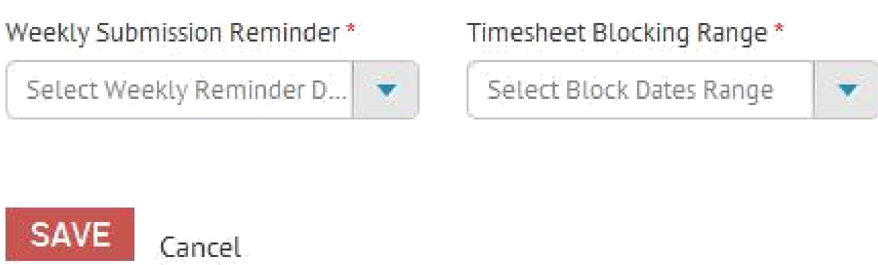


Figure 4.1

a. Click on Time in the header menu.

b. Click on Configuration in the Time menu.
c. Click on EDIT to setup the configurations
d. Select a day from the dropdown for Weekly Submission Reminder
e. Select an option to determine your monthly timesheet block range
f. Click on SAVE to apply these changes to your entire organization (editable later)

Can the Super Admin fill timesheets?

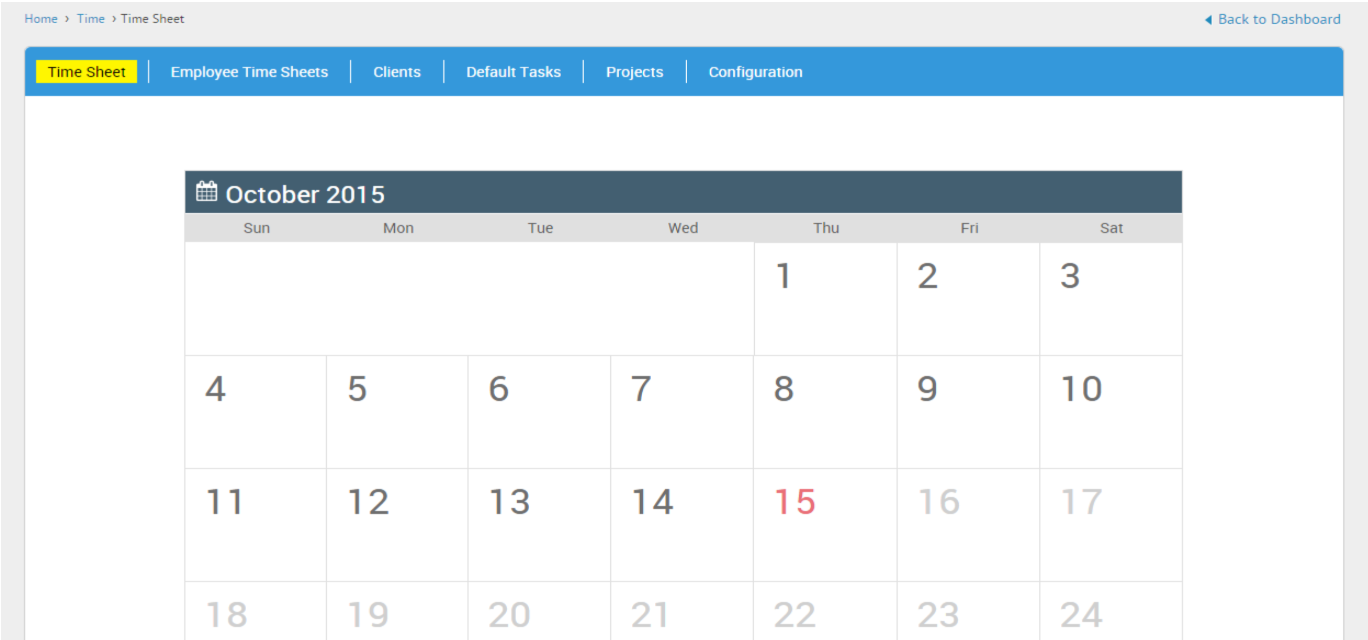


Figure 5

The Super Admin can view the current month's calendar and can't fill in timesheets unlike rest of the users.

Can the Super Admin Approve/Reject Employee Timesheets?

The Super Admin can view the timesheets of all Employees and can also Approve/Reject them.

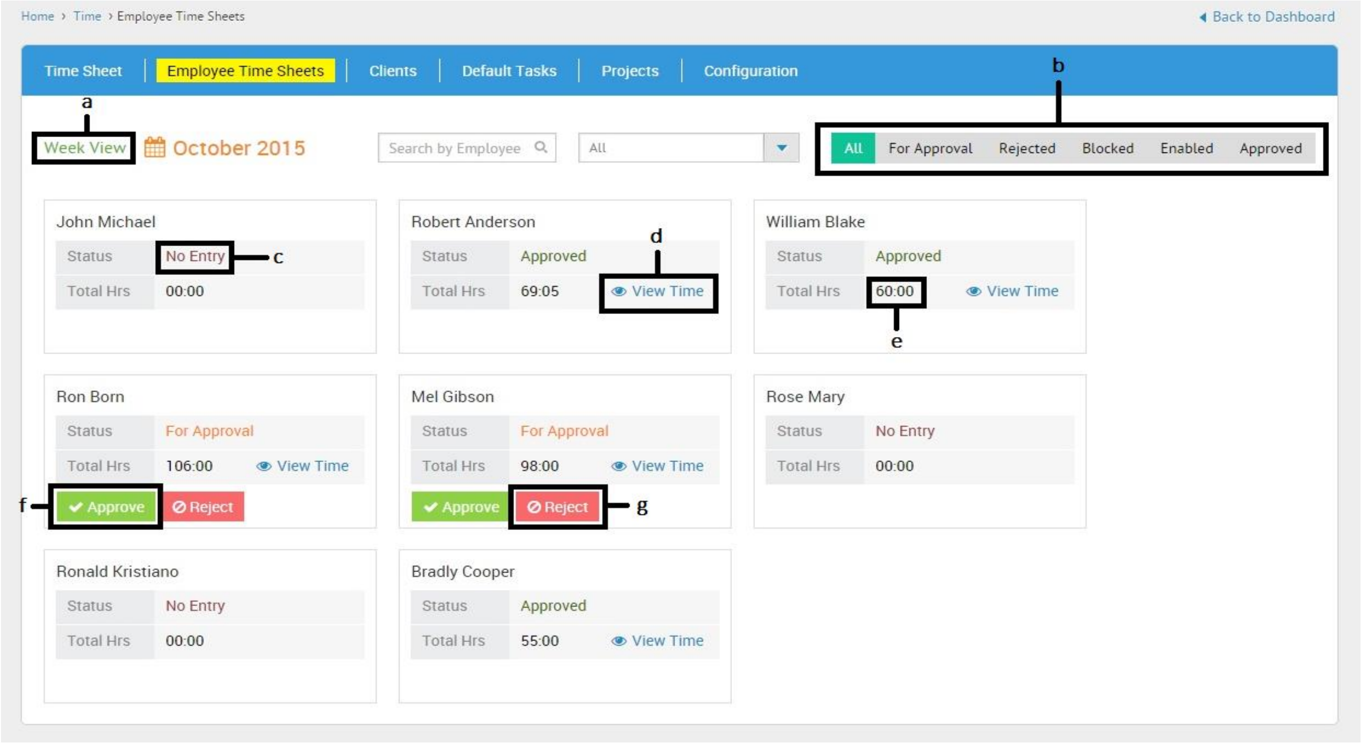


Figure 6

a. The view type (Weekly/Monthly). Click on the word Weekly View to change it to Monthly View mode.
b. Categories based on status of Timesheet
c. Timesheet status (No Entry, Approved, Rejected etc.)
d. View the Timesheet in detail
e. Total no. of hours worked
f. Approve Timesheet
g. Reject Timesheet

The Figure 6.1 shows the Weekly view options, in which the Timesheets of the Employees can be viewed for each week of the month.

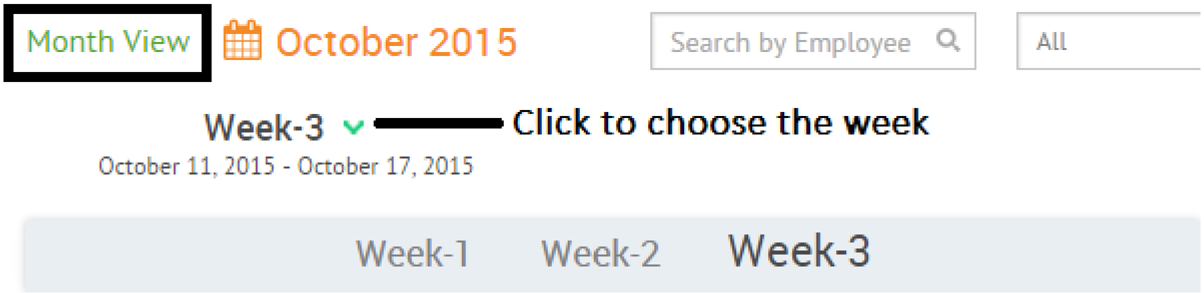


Figure 6.1

After completing all the above mentioned steps, your Time module is now ready to use.

What is the role of a Reporting Manager in Time module?

Note: Reporting Managers can belong to any role (Management/Manager/HR/Employee/System Admin) as long as they have Employees reporting to them.

A Reporting Manager has access to all the functions like the Super Admin, except for the '**Configuration**' function.

Reporting Managers have an extra feature of viewing the list of Employees who haven't submitted their timesheets yet.

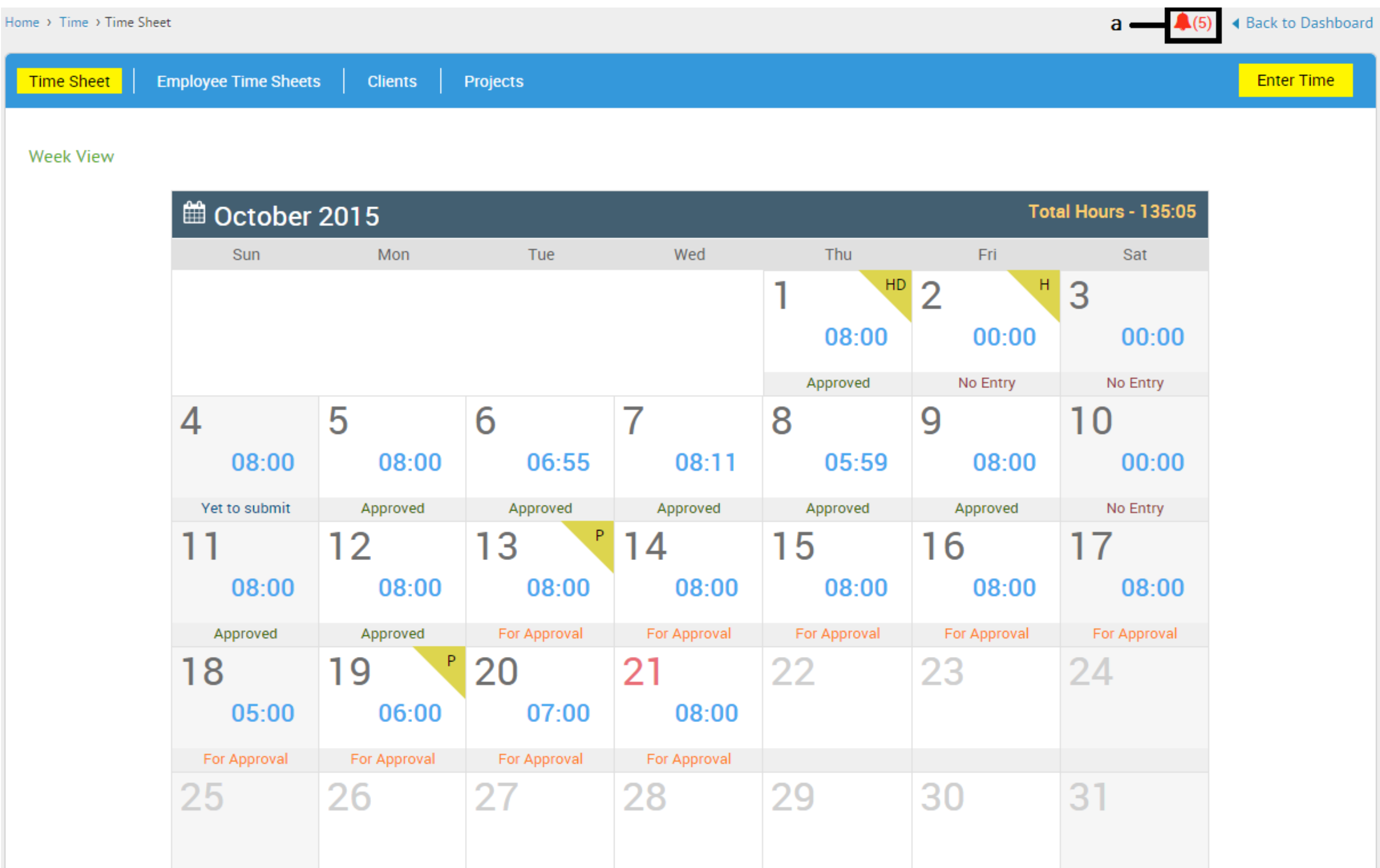
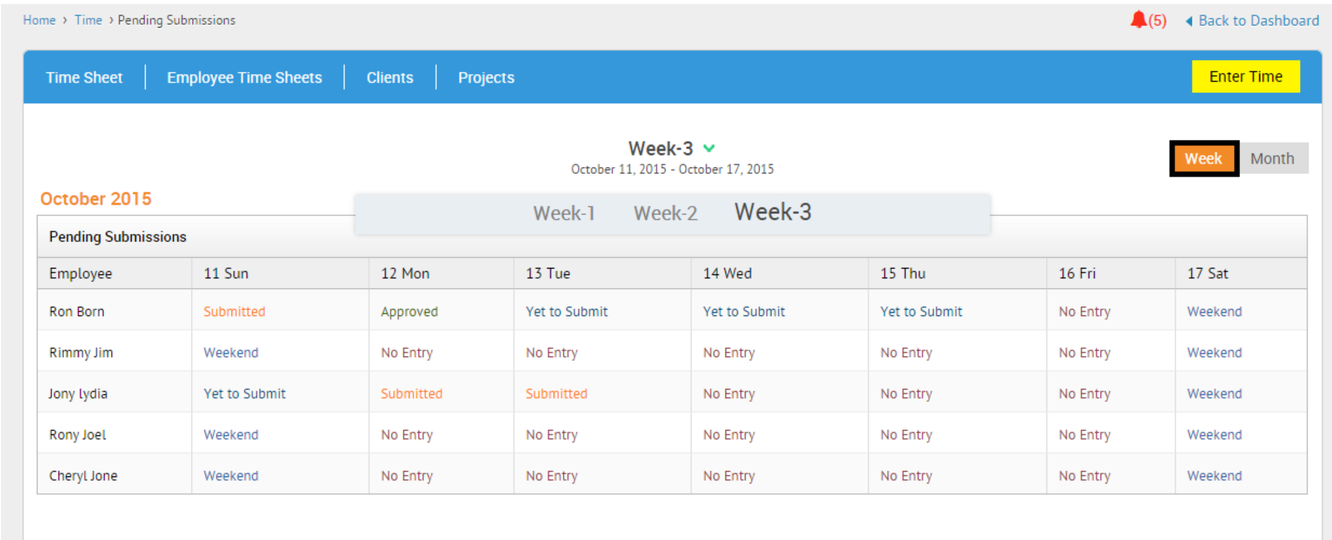


Figure 7

a. Click here to view the list of Employees who haven't submitted their timesheets. The number in the parentheses () denotes the number of Employees in the list.

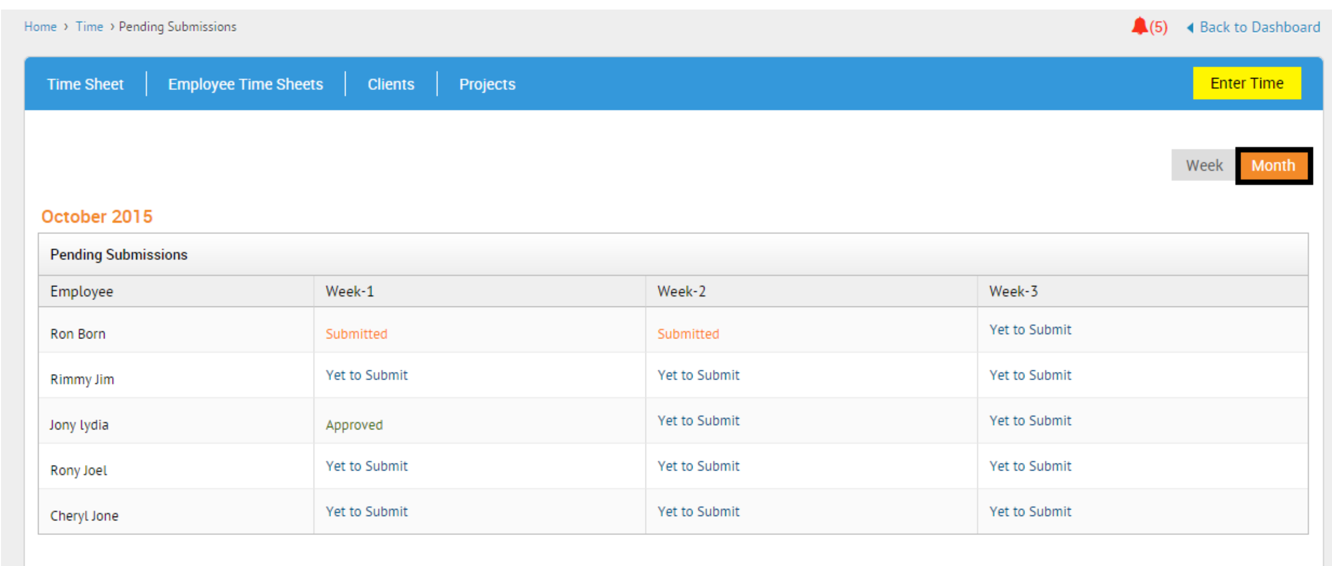
Weekly View for Pending Submissions:



Employee	11 Sun	12 Mon	13 Tue	14 Wed	15 Thu	16 Fri	17 Sat
Ron Born	Submitted	Approved	Yet to Submit	Yet to Submit	Yet to Submit	No Entry	Weekend
Rimmy Jim	Weekend	No Entry	No Entry	No Entry	No Entry	No Entry	Weekend
Jony lydia	Yet to Submit	Submitted	Submitted	No Entry	No Entry	No Entry	Weekend
Rony Joel	Weekend	No Entry	No Entry	No Entry	No Entry	No Entry	Weekend
Cheryl Jone	Weekend	No Entry	No Entry	No Entry	No Entry	No Entry	Weekend

Figure 7.1

Monthly View for Pending Submissions:



Employee	Week-1	Week-2	Week-3
Ron Born	Submitted	Submitted	Yet to Submit
Rimmy Jim	Yet to Submit	Yet to Submit	Yet to Submit
Jony lydia	Approved	Yet to Submit	Yet to Submit
Rony Joel	Yet to Submit	Yet to Submit	Yet to Submit
Cheryl Jone	Yet to Submit	Yet to Submit	Yet to Submit

Figure 7.2

How do I fill in timesheets?

When you log in to your Sentrifugo account and navigate to the Time module, this is how the screen will appear:

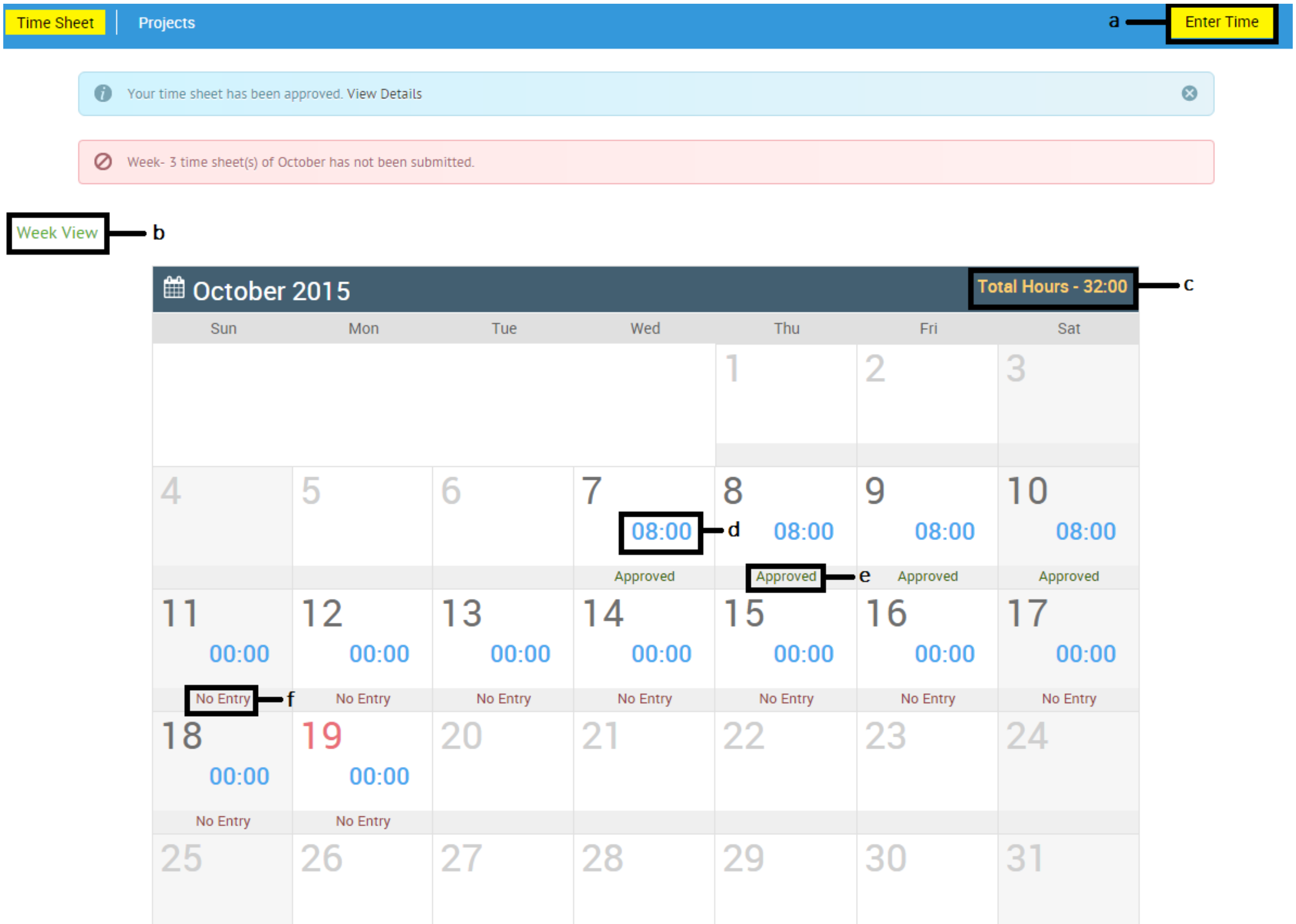
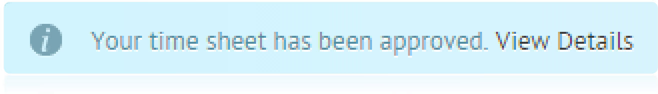


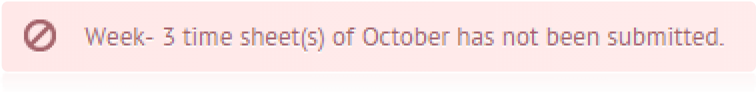
Figure 8

a. Will redirect you to the screen where you can fill in the timesheets
b. Shows the the weekly timesheets (For viewing purpose only)
c. Total number of hours worked by you **in a month**
d. Total number of hours worked by your **in a day**
e. Status of the timesheet e.g.- Approved
f. Status of the timesheet e.g.- No entry

You will see the following message if your timesheet has been approved:



If you've not filled in the timesheet for a particular week, you will find the following message:



If you want to enter hours into the timesheet, you should click on Enter Time and the following window will open:

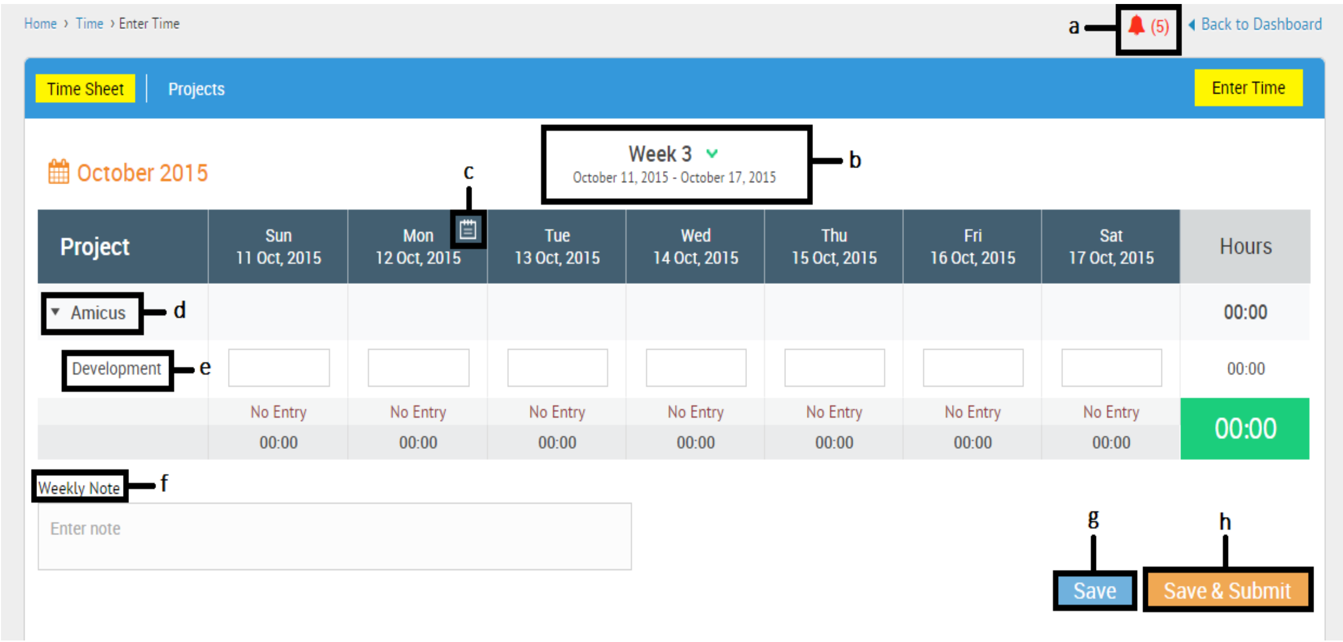


Figure 8.1

a. Reminders for filling in timesheets
b. You can change to whichever week you want
c. Daily notes/comments (You can give details about the tasks and the number of hours for the day)
d. Project name
e. Task name
f. Weekly notes/comments (You can give details about the tasks and the number of hours for the week)
g. Saves the timesheet (can be modified even after saving)

h. Saves & submits the timesheet for approval

How do I view Projects assigned to me?

Click on Projects to view the projects to which you have been added to and to view the project details.

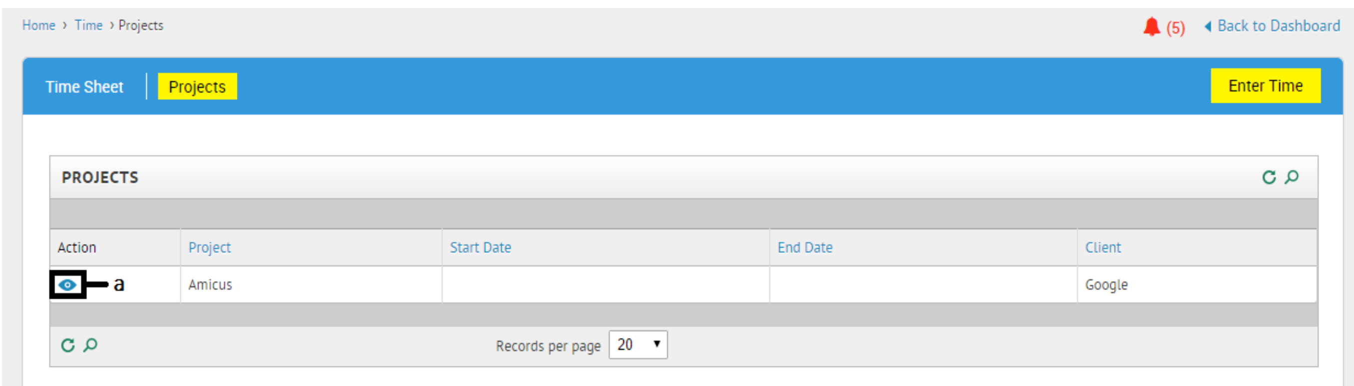


Figure 8.2

a. Click on this icon to view the details of the project.

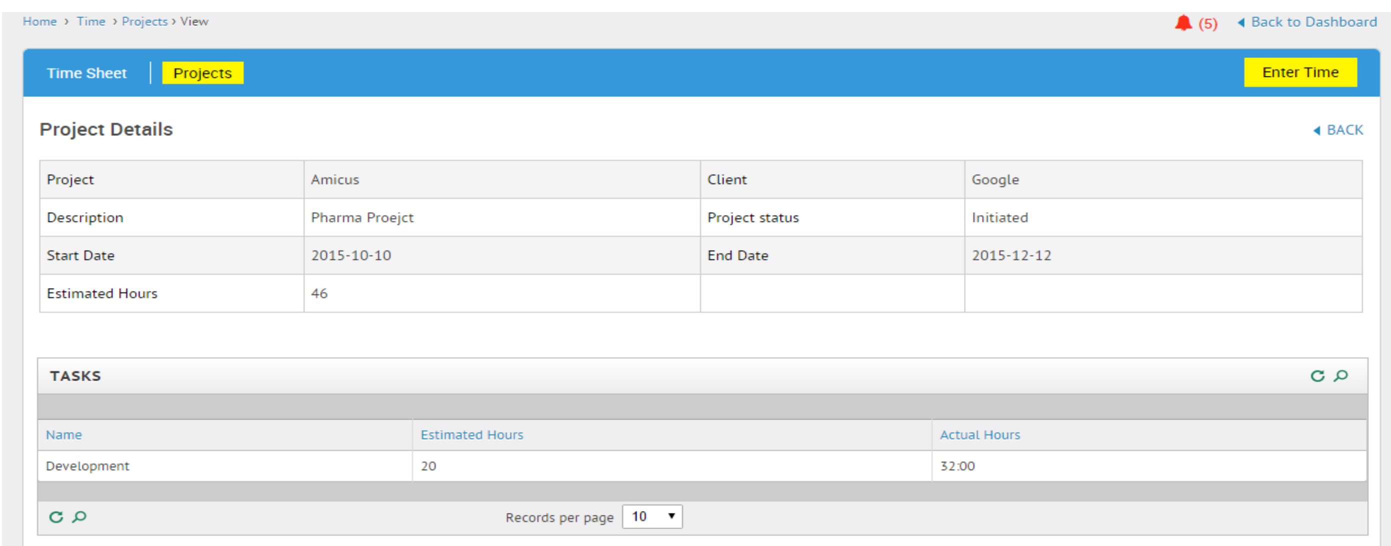


Figure 8.3

The above figure shows the details of the Project. The details are added by the Super Admin/Manager.