



Synergist Spotlight on...

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.





09/02/15 10:41am

Timesheet list

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 Lesley Hill										
3/00300040	2014-2105 Season	19/01/2015		3.00	0.00	0.00	3.00	125.00	375.00	0.00
3/00300040	2014-2105 Season	24/01/2015		3.00	0.00	0.00	3.00	125.00	375.00	0.00
3/00300040	2014-2105 Season	29/01/2015		3.00	0.00	0.00	3.00	125.00	375.00	0.00
3/00300040	2014-2105 Season	30/01/2015		3.00	0.00	0.00	3.00	125.00	375.00	0.00
3/00300040	2014-2105 Season	31/01/2015		3.00	0.00	0.00	3.00	125.00	375.00	0.00
3/00300040	2014-2105 Season	09/02/2015		3.00	0.00	0.00	3.00	300.00	900.00	0.00
Subtotal for Lesley Hill				18.00	0.00	0.00	18.00		2,775.00	0.00
staff Name Simon Buckby										
3/00300040	2014-2105 Season	19/01/2015		3.00	0.00	0.00	3.00	250.00	750.00	375.00
3/00300040	2014-2105 Season	22/01/2015		3.00	0.00	0.00	3.00	250.00	750.00	375.00
3/00300040	2014-2105 Season	29/01/2015		3.00	0.00	0.00	3.00	250.00	750.00	375.00

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.

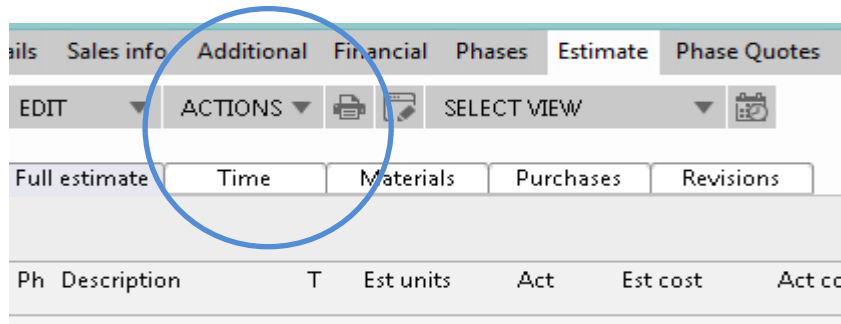
Estimate Tab Timesheet Report

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.**

(See Spotlight 2 for detailed information about how to create and save estimate views.)

To create an estimate report click on the 'actions button' at the top of the estimate tab and select 'Print estimate report' or 'Export estimate view'.





Printed Estimate report

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Chn	Act Chn	Pick
001 Design								
Designer	S							
Account Director	S	20.00		400.00		3,000.00		
Client Services Director	S	2.00		120.00		240.00		
Account Manager	S	5.00	22.00	165.00	440.00	500.00	2,200.00	
Phase Subtotals		27.00	22.00	685.00	440.00	3,740.00	2,200.00	
002 Development								
Designer	S	4.00	3.00	200.00	150.00	400.00	300.00	
Account Director	S		1.00		50.00		150.00	
Account Executive	S	2.00	11.00	200.00	1,100.00	400.00	2,200.00	
Client Services Director	S	3.00		180.00		360.00		
Account Manager	S	4.00		132.00		400.00		
Artworker	S	4.00	5.00	200.00	250.00	480.00	600.00	
Phase Subtotals		17.00	20.00	912.00	1,550.00	2,040.00	3,250.00	
003 Printing								

Export of Estimate Tab

Phase No	Description	Type	Estimated U	Actual Units	Estimated Cc	Actual Cost	Estimated Cf	Estimated Cf	Actual Charg	Estimated Pr	Estimated Gr	Staff
1	Design		0	0	0	0	0	0	0	0	0	0
	Designer	S	0	0	0	0	0	0	0	0	0	0
	Account Dire	S	20	0	400	0	150	3000	0	2600	3000	1/J/N
	Client Serv	S	2	0	120	0	120	240	0	120	240	
	Account Mar	S	5	22	165	440	100	500	2200	335	500	
2	Development		0	0	0	0	0	0	0	0	0	0
	Designer	S	4	3	200	150	100	400	300	200	400	
	Account Dire	S	0	1	0	50	0	0	150	0	0	
	Account Exec	S	2	11	200	1100	200	400	2200	200	400	
	Client Serv	S	3	0	180	0	120	360	0	180	360	
	Account Mar	S	4	0	132	0	100	400	0	268	400	
	Artworker	S	4	5	200	250	120	480	600	280	480	
3	Printing		0	0	0	0	0	0	0	0	0	0
	Printing	T	0	0	0	0	0	0	0	0	0	0
	Printing	B	0	0	234	0	0	280.8	0	46.8	46.8	
	Printing	B	0	0	289	0	0	346.8	0	57.8	57.8	
	Printing	B	0	0	340	340	0	408	408	68	68	

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 allow this report to show 5 daily columns (default), 5 weekly columns (tick 'By Week') or 5 monthly columns (tick 'By Month'). Also useful to report on pending time.

S Timesheets - By Day

Show details

Show Stage description

By Week (Starting Sun)

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** – Untick 'key' reports and further timesheet reports are displayed. This report is a weekly report that only shows entries for those who do have missing timesheets.





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.

Data viewer VIEW

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

'Choose the options you want from this page, then select the "data viewer" page'

Data types to display ...

- Time sheets Pending time
- Booked time
- Estimated time Remaining
- Client targets
- Sales invoices
- Sales recognised
- Gross profit
- Net profit
- Billing plans
- Billing plans (gross profit)
- Purchase orders
- PO estimates
- Expenses
- Expense estimates
- Materials
- Activities

Show weighted values

Value to display

- Units
- Cost
- Recommended charge

Available time

- Hide all available time
- Show total available time Use target available
- Show unbooked time (available - booked)
- Show unbooked time (available - estimated)

Opportunities

Display ... Opportunities

<input checked="" type="radio"/> Quoted value	Date to use	▼ Created date
<input type="radio"/> Gross margin		
<input type="radio"/> Net margin		

Lists of tables for reporting on timesheets

- **Timesheets** – Actual posted time
- **Estimated time** – for Capacity planning
- **Booked time** – for diary bookings

(See Spotlight 6 for detailed information about how to use the Data Viewer)





Example Reports using the Data viewer

These are some useful examples of how flexible the data viewer can be when reporting. All of these could be saved as User, Group or Company views.

Weekly Timesheet totals

- Tick Timesheets on the display options tab
- Could be further filtered by Timesheet staff

The screenshot shows the 'Data viewer' window with the 'Data viewer' tab selected. The 'Date & period' section is set to '05/01/2015' on a 'Monday' for '6' weeks. The 'Options' section has 'Show descriptions' and 'Show codes' checked, and 'Hide zeroes' unchecked. The table below shows time actuals for two staff members: Lesley Hill and Tom Thumb.

Staff		05/01/2015	12/01/2015	19/01/2015	26/01/2015	02/02/2015	09/02/2015	Total
Lesley Hill	Time Actual	0.00	5.00	31.00	10.00	0.00	0.00	46.00
Tom Thumb	Time Actual	3.00	3.00	3.00	0.00	0.00	0.00	9.00

Internal Timesheets

- Untick 'external' on the job query tab so that only internal hours are shown
- Drag in job/phase or charge code to get the granularity about what internal time is being recorded.

The screenshot shows the 'Data viewer' window with the 'Job query' tab selected. The 'Date & period' section is set to '01/01/2015' on a 'Thursday' for '5' weeks, with 'Use a pre-set range' checked and 'Last month' selected. The 'Options' section has 'Show descriptions' and 'Show codes' checked, and 'Hide zeroes' unchecked. The table below shows time actuals for three jobs: 3/00300024 (Internal non-chargeable) and 3/00300025 (Calendar bookings test).

Job	Staff		01/01/2015	08/01/2015	15/01/2015	22/01/2015	29/01/2015	Total
3/00300024 - Internal non-chargeable	Lesley Hill	Time Actual	0.00	0.00	9.00	5.00	0.00	14.00
	Tim Barton	Time Actual	4.00	4.00	4.00	0.00	0.00	12.00
	Tom Thumb	Time Actual	5.00	5.00	5.00	0.00	0.00	15.00
3/00300025 - Calendar bookings test	Lesley Hill	Time Actual	0.00	0.00	3.00	2.00	0.00	5.00





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.

The screenshot shows the 'Data viewer' window with the following data table:

Job	Staff	In-house	Live	Total	
3/00300002 - Nominal Code Analysis	Lesley Hill	Time Actual	0.00	12.00	12.00
3/00300024 - Internal non-chargeable	Lesley Hill	Time Actual	14.00	0.00	14.00
	Tim Barton	Time Actual	12.00	0.00	12.00
	Tom Thumb	Time Actual	15.00	0.00	15.00
3/00300025 - Calendar bookings test	Lesley Hill	Time Actual	5.00	0.00	5.00
3/00300068 - Quarter one 2015 advert	Lesley Hill	Time Actual	0.00	15.00	15.00
	Tom Thumb	Time Actual	0.00	9.00	9.00

Time Units

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

The 'Value to display' dropdown menu is shown with the following options:

- Units
- Cost
- Recommended charge





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 scheduler and click 'new'.
- Select Overdue 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.

Utilities - LH Training

Scheduled events

Alert/process: **Overdue Time sheets** Active

Description: Overdue Time sheets

Frequency

Freq. type: **Weekly**

Time: **12:00 AM**

Day of week: **Monday**

Parameters

Company: **- All -**

User: *** 4D Server ***

Pre-process...

None

4D method

FootRunner

Post-process...

None

4D method

FootRunner

- Also check on the users 'approval' tab and select a Line Manager's name. When the alert is triggered, the individual and the 'managed by' will receive an alert.





S User: Tom.Thumb

Tom.Thumb

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
No Approval

Managed by

Out of office handler permissions

Deputy 1

Deputy 2

