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.

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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.

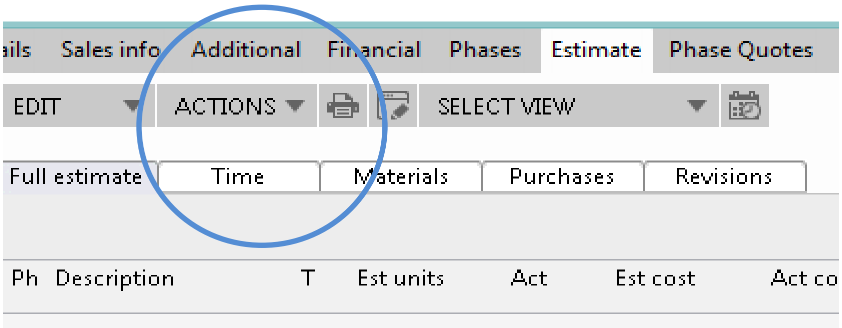
Estimate Tab Timesheet Report

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'.



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Printed Estimate report

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Chg	Act Chg	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

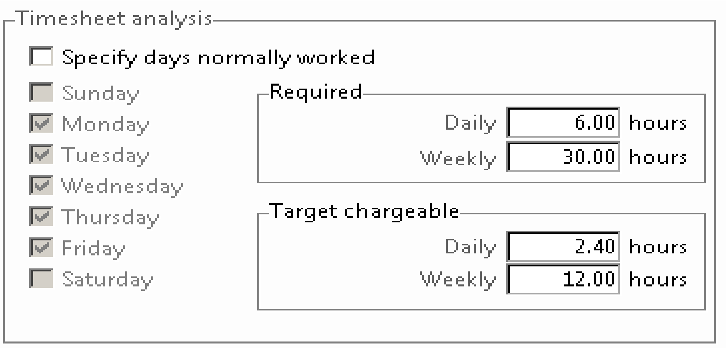
Phase No	Description	Type	Estimated Ur	Actual Units	Estimated Cc	Actual Cost	Estimated Ch	Estimated Ch	Actual Charg	Estimated Pr	Estimated Gr	Staff
1	Design		0	0	0	0	0	0	0	0	0	
	Designer	S	0	0	0	0	0	0	0	0	0	
	Account Dire	S	20	0	400	0	150	3000	0	2600	3000	1/JN
	Client Servic	S	2	0	120	0	120	240	0	120	240	
	Account Mar	S	5	22	165	440	100	500	2200	335	500	
			0	0	0	0	0	0	0	0	0	
2	Development		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 Exe	S	2	11	200	1100	200	400	2200	200	400	
	Client Servic	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	
			0	0	0	0	0	0	0	0	0	
3	Printing		0	0	0	0	0	0	0	0	0	
	Printing	T	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:

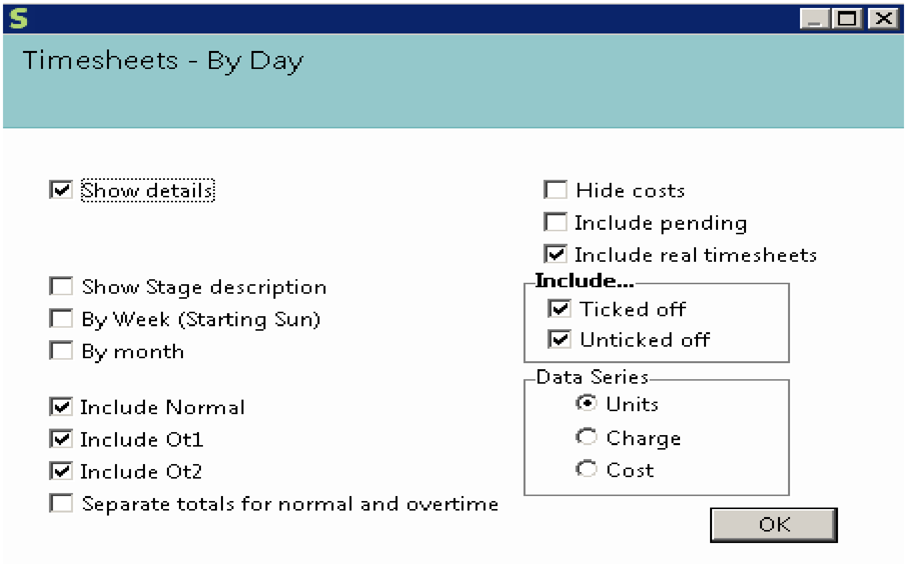
- **Staff Analysis** – Gives detail regarding chargeable/non chargeable time and a breakdown of overtime. Additional criteria can be used to show a breakdown by job.

- **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 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.



- **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.

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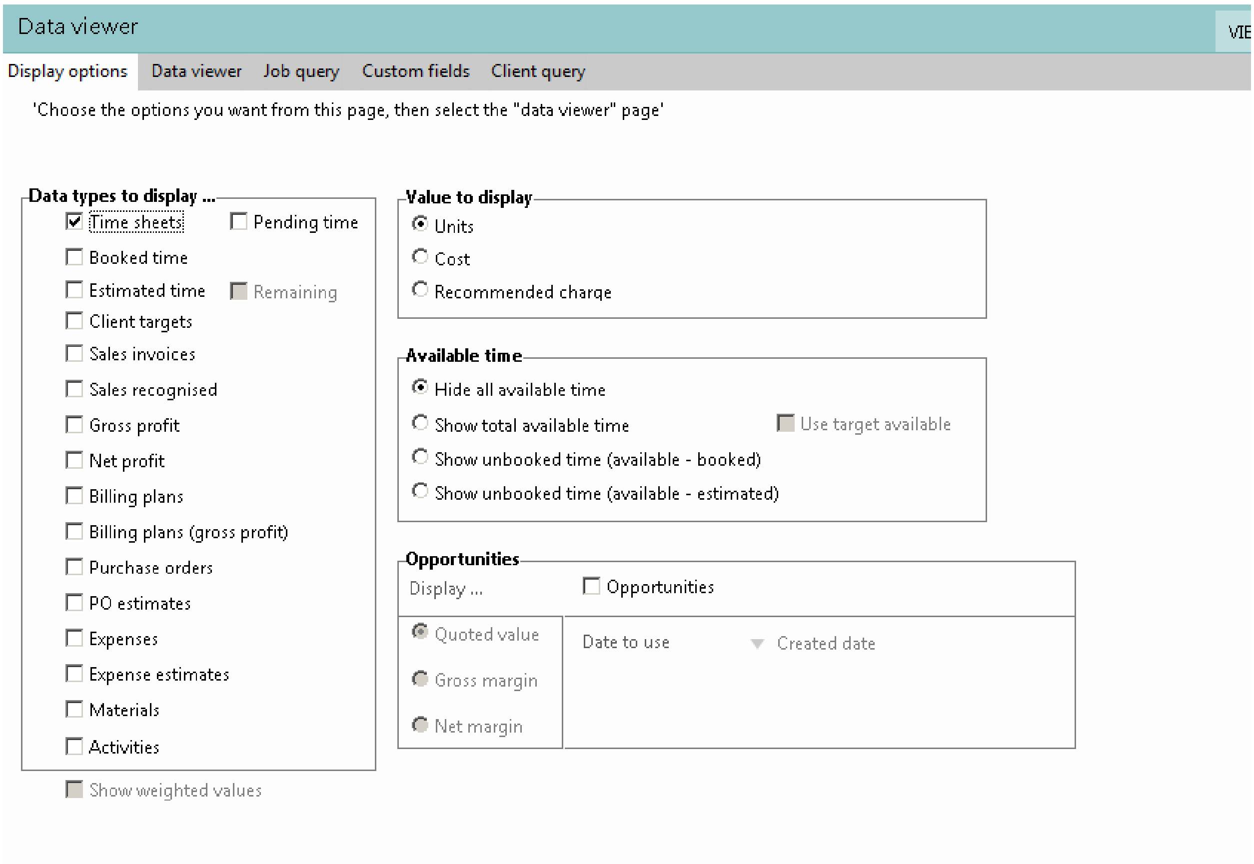
3. Timesheet reports using the Data Viewer

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.



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)

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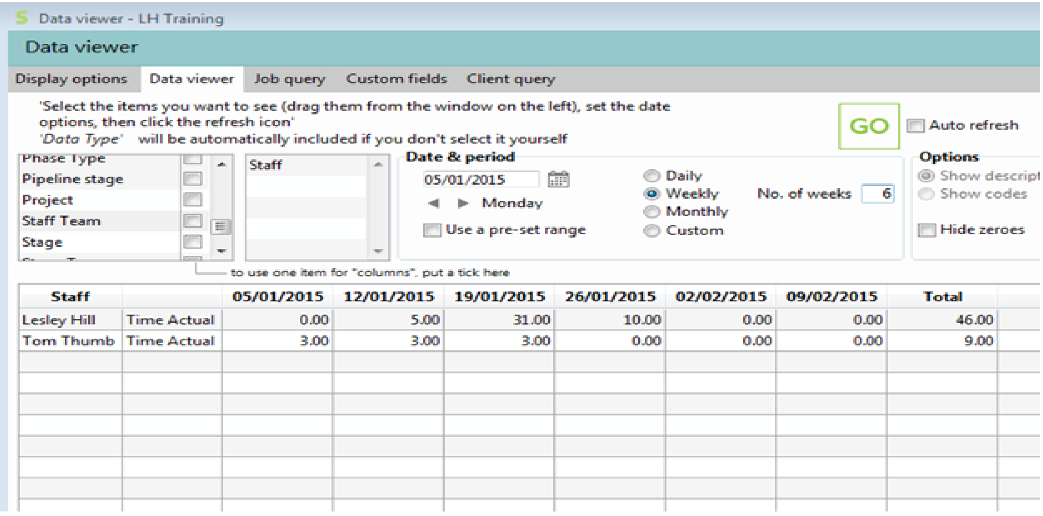
Example Reports using the Data viewer

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.

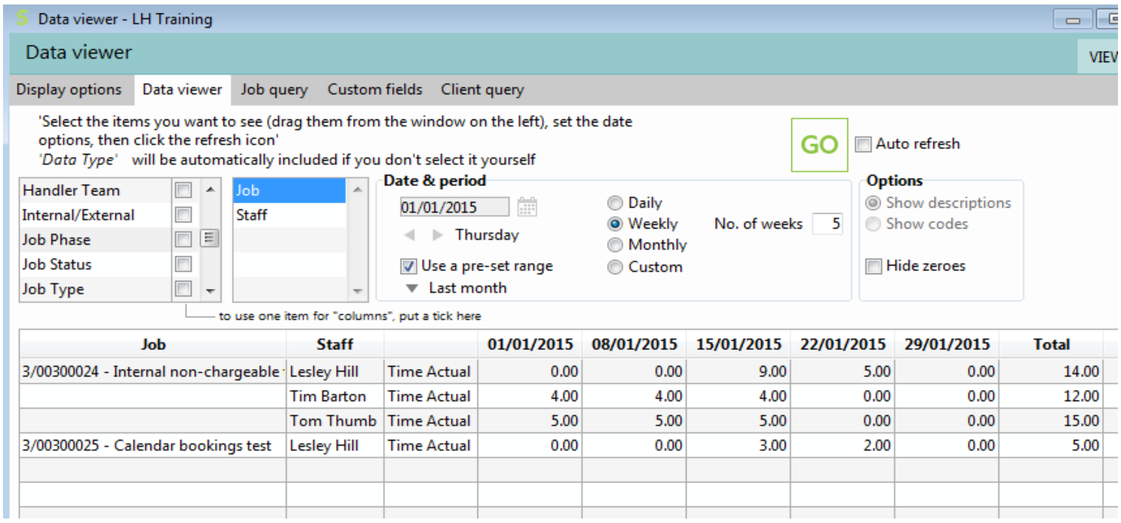
Weekly Timesheet totals

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



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.



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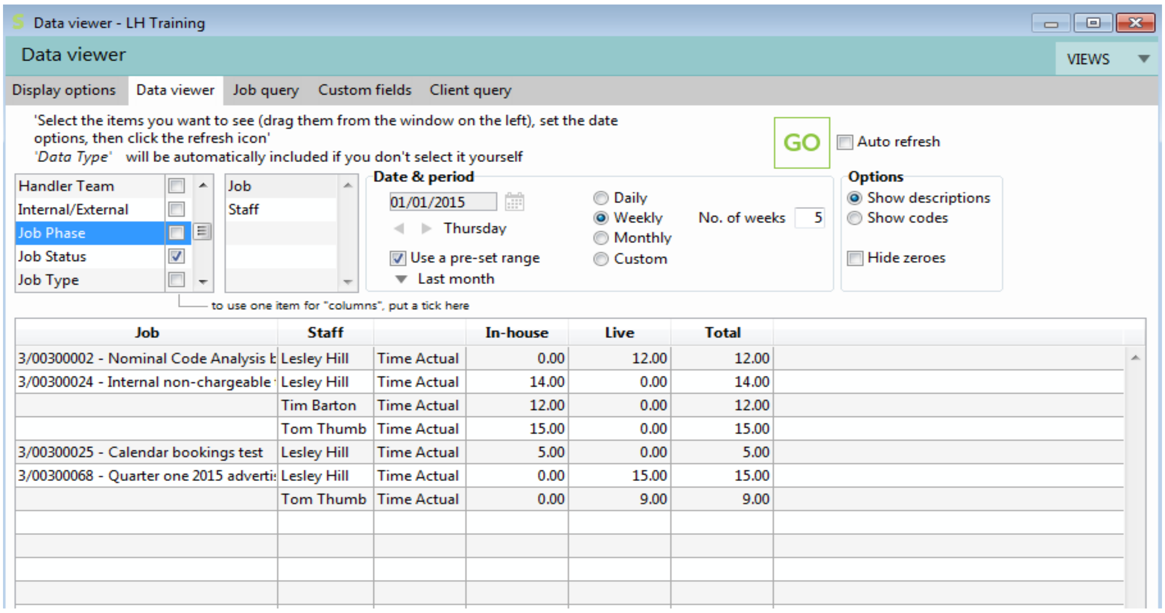
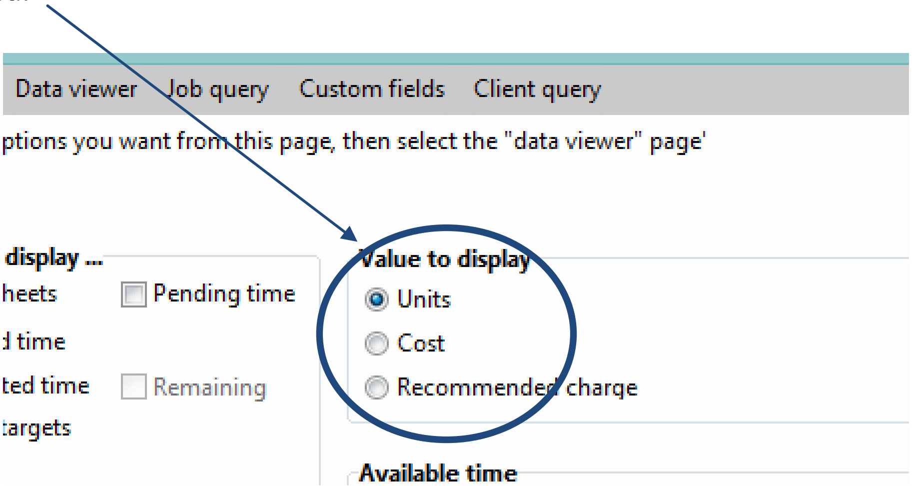
Timesheets by Job status

- 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.



Time Units

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



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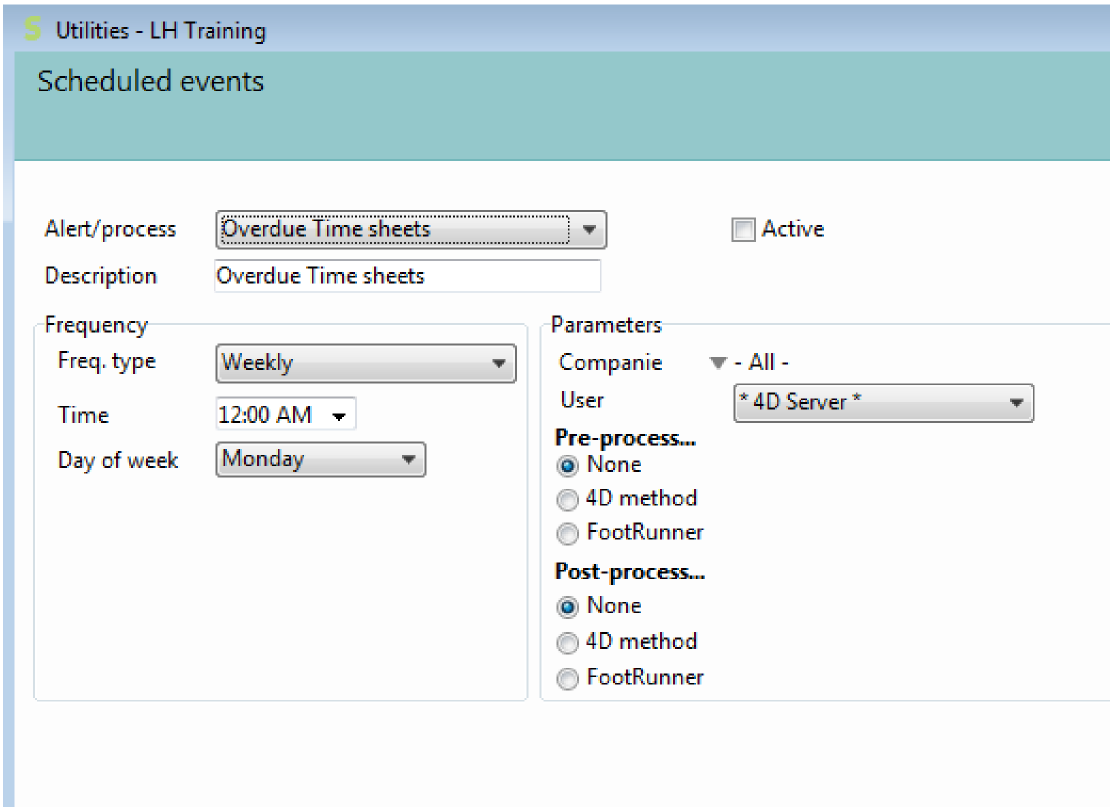
Scheduler

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.



- 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.

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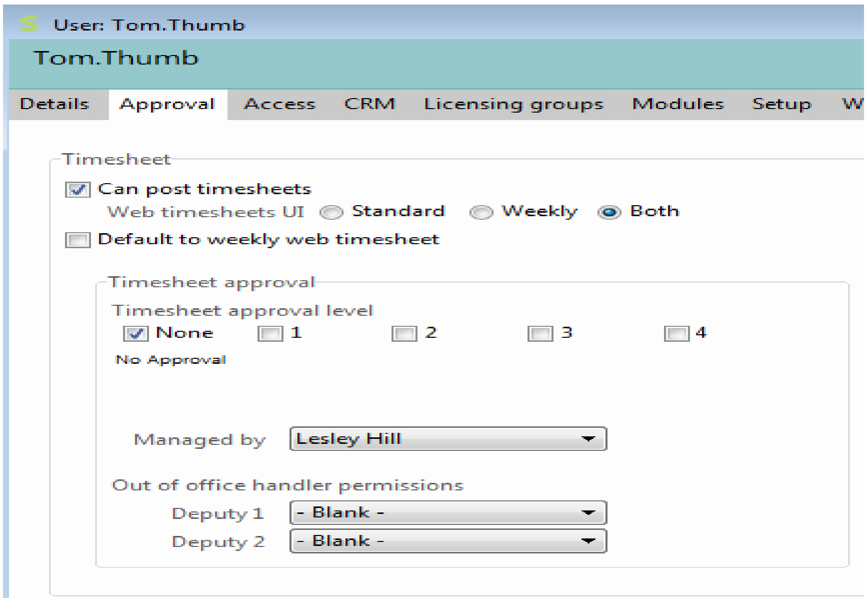
User: Tom.Thumb
Tom.Thumb
Details
Approval
Access
CRM
Licensing groups
Modules
Setup
W
Timesheet
Can post timesheets
Web timesheets UI
Standard
Weekly
Both
Default to weekly web timesheet
Timesheet approval
Timesheet approval level
None
1
2
3
4
No Approval
Managed by
Lesley Hill
Out of office handler permissions
Deputy 1
- Blank -
Deputy 2
- Blank -