



TimeSuite : Business Management Software

TimeSuite is a software suite designed specifically for small to medium businesses requiring an integrated system to manage projects, tasks, timesheet entry and approval, business contacts, invoicing, payments and to exchange this information with other business systems.

TimeSuite enables full control of your projects, including:

- Budgeting to individual task level.
- Task assignment and tracking.
- Timesheet entry, approval and export to other business systems.
- Creation of individual charge rates for combinations of user, job type and time for each and every project.

Advanced role based security enables you to easily control individual user access to all features of the system.

Relationship management enables you to define the relationships between people, organisations, projects and clients.

Other time saving features include:

- Timesheets can be created, submitted and approved in minutes.
- You can quickly create detailed timesheet approval paths.
- Approved timesheet information can quickly and easily be downloaded to external business systems for invoicing or analysis.
- Reminders are automatically emailed to users who have not submitted their timesheets or whose timesheet hours do not match the minimum weekly hours required.
- Reminders are sent to timesheet approvers who have unapproved timesheets.
- Detailed reports are available in real time on system status, projects and many other components.
- Invoices can quickly be created based on either approved timesheet entries or free form. The invoice can be emailed to the Client saving postage costs and reducing stationery usage.
- Unpaid and overdue invoices can easily be tracked.

TimeSuite manages

- Projects
- Tasks
- Budgets
- Charge Rates
- Timesheets
- Reminders
- Contacts
- Data Approval
- Data Export
- Security
- Cost Centres
- Job Types
- Invoicing
- Payments

“TimeSuite saves you time and money by centralising your business information”

TimeSuite contact details :

web : www.timesuite.com.au
email : enquiries@timesuite.com.au
telephone : (02) 4966 0602

TimeSuite Feature Overview

System Features

- Project Management
- Task Management
- Timesheet collection, approval and export
- Role Based Security
- SSL Security secures data in transit
- Online helpdesk
- Continuous feature development
- Web-based - no software install required
- Upgradable subscription plans
- 'At a glance' Dashboards provide summary information
- TimeSuite Assistant and Help System
- Unlimited user defined cost centres
- Unlimited user defined job types (activity codes)

Included Modules

- Project Management
- Task & Collaboration Management
- Document Management*
- Contact Management (Address Book)
- Timesheet Entry
- User Definable Timesheet Approval Paths
- Timesheet Approval
- Timesheet Export
- Automatic Email Reminders
- Custom Role Management
- User Management
- User Preferences / Customisation

Optional Modules

- Additional User Licences
- Invoicing, payment tracking and reconciliation

Free TimeSuite Trial

- An obligation free trial of TimeSuite is available on request
- Online guided demonstration also available on request

Hosting Environment and Physical Security

- TimeSuite is hosted in a modern, fully secured hosting environment featuring
 - 24 x 7 biometric site security and full video surveillance
 - Minimum N+1 redundancy on all systems
 - Real time database backup
 - Latest HP server hardware

* Full document management module will be available in 2010.

TimeSuite System Security

TimeSuite incorporates an advanced role based security system

You can quickly specify the roles that each member of your organisation, all clients, suppliers and their employees are assigned.

In addition, you can assign relationships between each of these roles to define exactly how users and organisations interact.

Some examples include:

- Managing teams or groups within your organisation. You can define Managers together with their Team Members.
- Define Project Teams and each users role within a specific project.
- Define Clients and their employees for easy lookup of contact details.

Using this information, TimeSuite can then:

- Control security systems to restrict user access to only the features they should be allowed to use.
- Generate complex timesheet approval paths so that specific users or users in a certain role can approve submitted timesheets.
- Produce customised reports such as:
 - Managers Team Member utilisation.
 - Incomplete or overdue tasks assigned to specific users or teams.
 - Incomplete or overdue tasks raised by a specific user.

Project Management using TimeSuite

TimeSuite provides detailed Project Management and Budgeting Features

Each project your organisation undertakes can be created and managed in detail including:

- Project Team members and their role within the project.
- Individual user charge rates per job type (activity code) and for different timeframes.
- Approval rules for submitted timesheets.
- Individual tasks, budget for each task and what job types consumed time and other resources should be charged to for the task.
- Each task budget rolls up to complete the full project budget.

Setting up User Charge Out Rates is a simple operation.

You can define individual charge rates per user per job type and for discrete time periods for every project. This allows complete flexibility to adjust charge rates from users default charge rates for special projects or where different charge rates have been agreed with the client.

Define rates for project : Brent Ridge Appartments

Start	1 - Project details	2 - Personnel involved	3 - Job Types	4 - Set up rates	Complete
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Step 4 - define chargeable rates for this project.

EC	PC	SC	DR	PR	Conc	TD
Unassigned personnel		Rate assigned personnel		Charge out rate	Valid from	Valid to
Samantha Jones (Sam) [Project Director]		Ross DuPree		\$0.650 / km	12/11/2009	-
Brian Walker (Brains) [Project Team Member]		Wayne Robson		\$0.650 / km	12/11/2009	-
Tania Coleman [Project Team Member]				0.00 / km	13/11/2009	Assign Rate

User Charge Out Rates

These rates are used by the timesheet system to calculate the amount to be charged to the client. This value can also be adjusted during the timesheet approval process if required.


Setup of the project is quick and easy, with a wizard guiding you through each step in the process.

You can also take advantage of the project template feature to make setup even quicker. Once a template is created, setup of an entire project framework can be accomplished in about fifteen seconds. This is especially useful when you have multiple, similarly structured projects.


Project Details

Project Name : Brent Ridge Apartments
 Project Type : External
 Client : Brent Ridge Development Pty Ltd
 Project Description : Brent Ridge Apartments design and build
 Timesheet Approval Rule : Brent Ridge Custom Rule
 Created by : SJones on 12/11/2009
 Start Date : 12/11/2009
 End Date : -
 Status : Active

Modify Project Setup



View Project Details



Personnel Involved in this project

Role	Personnel Name	Manager	Status
Project Team Member	Brian Walker (Brains)	Ross DuPree (RossD)	Active
Project Director	Ross DuPree (RossD)	Samantha Jones (Sam)	Active
Project Director	Samantha Jones (Sam)	Samantha Jones (Sam)	Active
Project Team Member	Tania Coleman	Samantha Jones (Sam)	Active
Project Manager	Wayne Robson	Samantha Jones (Sam)	Active

Incomplete tasks for this project.

Task	Created by	Assigned to	Type	Priority	Due date	Status
Concept design	SJones	TColeman	Project Task	Urgent	01/12/2009	Open
Design	SJones	BWalker	Project Task	Medium	21/12/2009	Open
Design Coordination	SJones	WRobson	Project Task	High	06/02/2010	Open
initial Meeting	SJones	SJones	Project Task	Urgent	16/11/2009	Open

Example Project Overview

From the project overview screen, Project Directors and Project Managers can access detailed reports on project status, create and manage tasks within the project and once completed, close the project for archiving.

Closed projects can be reopened later on if required.

Project Directors can return to project setup and make changes at any time once setup is completed.

Reports on all facets of the project are available in real time and are only accessible to users with appropriate permissions.

Some of the reports available include:

- Project team members, roles and status.
- Chargeout rates.
- Tasks, including information on assignee, due date, current status and estimated, actual and approved costs.
- Full Project Budget.
- Timesheets for the project (allowing custom filtering).

When there are lots of concurrent projects, TimeSuites' project search function allows you to find specific projects quickly. The role based security system determines what features of the project individual users can access.

The budget screen within the project management module includes 'at a glance' details of the project by cost and resource usage for both estimated, actual and approved resource usage and cost.

These details are further broken down into time and other resource usage and also by job type.

Further and more granular information can be obtained by drilling down into individual tasks or timesheet information.

Projects	Personnel	Chargeout rates	Tasks	Budget	Timesheets				
i									
<i>Budget for project : Brent Ridge Apartments for Brent Ridge Development Pty Ltd</i>									
Summary - All costs									
Estimated Total Costs : \$19 885.00			Project Status Icons here						
Actual Total Costs : \$0.00									
Approved Total Costs : \$0.00									
Summary - Time tracking			Summary - Other Resource Tracking						
	Hours	Cost							
Estimated Totals :	140.00	\$18 370.00	Estimated Total Costs :	\$1 515.00					
Actual Totals :	0.00	\$0.00	Actual Total Costs :	\$0.00					
Approved Totals :	0.00	\$0.00	Approved Total Costs :	\$0.00					
Breakdown summary - Time based job types									
Cost Centre	Job Type	Est Hrs	Act Hrs	App Hrs	Est Cost	Act Cost	App Cost	Invoiced	UnCharged
Compliance (Comp)	Environmental Compliance (EC)	0.000	0.000	0.000	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Planning compliance (PC)	8.000	0.000	0.000	\$2 400.00	\$0.00	\$0.00	\$0.00	\$0.00
	Structural Compliance (SC)	32.000	0.000	0.000	\$3 520.00	\$0.00	\$0.00	\$0.00	\$0.00
Drafting (Draft)	Drafting (DR)	100.000	0.000	0.000	\$12 450.00	\$0.00	\$0.00	\$0.00	\$0.00
Graphic Design (GD)	Conceptualisation (Conc)	0.000	0.000	0.000	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Totals	140.00	0.00	0.00	\$18 370.00	\$0.00	\$0.00	\$0.00	\$0.00
Breakdown summary - Other resources									
Cost Centre	Job Type	Est Qty	Act Qty	App Qty	Est Cost	Act Cost	App Cost	Invoiced	UnCharged
Drafting (Draft)	Printing Drafting (PR) [pages]	1200.000	0.000	0.000	\$540.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel (Trav)	Travel Distance (TD) [kms]	1500.000	0.000	0.000	\$975.00	\$0.00	\$0.00	\$0.00	\$0.00
	Totals				\$1 515.00	\$0.00	\$0.00	\$0.00	\$0.00

Example Project Budget

Task Management System

The task management system within TimeSuite is directly linked to the Project Management system. This allows complete control of budgeting for individual tasks within a project and also provides increased collaboration between all members of your organisation.

Tasks are available for several different applications. The primary type of task is directly related to a project and is generally controlled by the Project Manager or Director.

All project tasks have integrated tracking histories for changes, assignments, timesheet entries and comments plus individual budgets which roll up to form a part of the main project budget.

Other types of task can also be created, including:

- Journals - a permanent record of an event that has occurred.
- Phone messages. This type of task can be added to a project and allows timesheets to be entered against the time spent on the task. It significantly reduces the need for paper or email notifications when a user is not available to answer a phone call or other contact.
- Personal reminder. This type of task is designed for personal use. No other users can access the details of the task. You cannot enter timesheets against this type of task.

Tasks that are part of a project can be updated, reported on, have assignees changed (for example when a task must be worked on by multiple people) and can also be closed off once complete. Tasks can also be reopened later on if necessary.

Role based security dictates which users can access the details of the task or make changes to its budget.

Task details :

Task ID / Ticket number : 62
 Task : Design
 Client : Brent Ridge Development Pty Ltd
 Project : Brent Ridge Appartments (P3271)
 Task type : Project Task
 Priority : Medium
 Status : In Progress
 Date due : 21/12/2009

Task History :
 2009-11-12 14:14:13 - Created by SJones
 2009-11-12 14:14:13 - Assigned to BWalker
 2009-11-13 11:47:43 - Read by recipient BWalker

Task Options

Task Budget

Time Tracking	Est Qty	Act Qty	App Qty	Est Cost	Act Cost	App Cost
Drafting (DR) [hours]	80.000	2.250	0.000	10000.000	281.250	0.000
Structural Compliance (SC) [hours]	32.000	3.750	0.000	3520.000	412.500	0.000
Time Totals	112.00	6.00	0.00	13 520.00	693.75	0.00
Other resource types						
Printing Drafting (PR) [pages]	1200.000	42.000	0.000	540.000	18.900	0.000
Other Resource Totals				540.00	18.90	0.00
Total Costs				14 060.00	712.65	0.00

Description :
 On Nov 12 2009 2:14PM SJones wrote:

 Initial Design of building

More details Update Task

Timesheets for this task

Date	User	Comment	Job Type	Status	Quantity	\$
13/11/2009 11:48:40 AM	BWalker	Setup file structure. Load data from client.	Drafting (DR)	Open	2.250 hours	281.250
13/11/2009 11:49:13 AM	BWalker	Print draft design for review.	Printing Drafting (PR)	Open	42.000 pages	18.900
13/11/2009 11:50:23 AM	BWalker	Stress analysis of steel beam superstructure for balconies	Structural Compliance (SC)	Open	3.750 hours	412.500

Task completion details :
 You may add a timesheet entry by completing the fields below.

Create timesheet entry

Charge to : for :

Timesheet comments :
 Characters remaining : 4000

Mark task as complete even if I don't have a valid charge-out rate.

Timesheet Management within TimeSuite

Collecting timesheet information is a key part of successful business management.

TimeSuite collects timesheet information from each user either by direct entry of a timesheet or by adding the timesheet entry from a task information page. This means that not only can you track the actual hours or other resource usage, but you can also track it directly from an employee of your organisation to a task, project, client, job type and cost centre.

For each timesheet entry, you can easily track the following information:

- Employee ID
- Employee Name
- Date of timesheet entry
- Project Name
- Project Code
- Task Number(if timesheet is charged against a task)
- Link to the task for budget, and other details of the task (if timesheet is charged against a task)
- Client Name
- Timesheet Comments
- Job Type Name
- Job Type Code
- Cost Centre Name
- Cost Centre Code
- Unit of Measurement
- Estimated task resource usage (if timesheet is charged against a task)
- Estimated task cost (if timesheet is charged against a task)
- Actual Quantity
- Actual Value
- Approved Quantity
- Approved Value
- Chain of approval for the timesheet

Entering Timesheets is quick and easy.

The timesheet entry interface opens on the current timesheet week and day. Users enter a timesheet by selecting the appropriate project, job type, quantity of time or other resource to add plus optional comments.

Only details pertaining directly to the users situation are available. This means that users can only enter timesheets for projects and charge rates that are assigned them. This significantly reduces the chance of errors in timesheet entry and also makes data entry quicker as there are less options for the user to choose from.

Users can optionally attach the timesheet to an existing task. This allows detailed tracking of resource usage to the relevant task and project budget.

TimeSheet summary for this week

Time Tracking	Other Resources	<div style="border: 1px solid black; padding: 2px; font-size: small;"> ≤ November 2009 ≥ Mon Tue Wed Thu Fri Sat Sun 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5 6 </div>																		
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You still need to enter 34.00 hours and submit 40.00 hours to meet your required 40.00 hours for this week.

Mon 9/11/2009	Tue 10/11/2009	Wed 11/11/2009	Thur 12/11/2009	Fri 13/11/2009	Sat 14/11/2009	Sun 15/11/2009	Summary
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Project	Job Type	Qty	Appvd	Comment	Status
Brent Ridge Apartments for Brent Ridge Development Pty Ltd	Drafting (DR)	2.250 hours	2.250 hours	Setup file structure. Load data from client.	Open
Brent Ridge Apartments for Brent Ridge Development Pty Ltd	Printing Drafting (PR)	42.000 pages	42.000 pages	Print draft design for review.	Open
Brent Ridge Apartments for Brent Ridge Development Pty Ltd	Structural Compliance (SC)	3.750 hours	3.750 hours	Stress analysis of steel beam superstructure for balconies	Open

New timesheet entry

Select Project :

Select job type :

Enter quantity :

Comments :
Characters remaining : 4000

Main Timesheet Entry Screen

Users can also add timesheets via the task details page. This reduces the amount of options to select as the project and job type is already known.

Users may then edit timesheet details as required, or delete the timesheet if necessary up to the time where they submit the timesheet for approval.

Timesheets can be entered and submitted for approval at any time. There is no need to wait for the end of the week to enter details. Users can even enter time in advance, for example holiday leave.

The timesheet details page tracks all timesheets entered for the current week and provides a summary of timesheet entries per job type and also the hours still to be submitted to reach their minimum required hours for the week (if specified in the user setup).

A weekly summary breaking down the users entered timesheets into client, project and job type is also available in real time. From the summary screen, users can submit all or selected timesheets for approval at any point in time. All timesheets can also be edited or deleted up until the point when the user submits them for approval. Approvers can then make amendments and approve, or reject the timesheet as required.

TimeSuite automatically sends email reminders on the start day of your organisations timesheet week if the user has unsubmitted timesheets or has not entered sufficient hours to meet the previous weeks required hours.

Additional emails can be sent to your financial personnel. These emails provide reports on timesheets that must be entered or submitted and notifies timesheet approvers of any timesheet entries submitted and which they have not yet approved.

TimeSheet summary for this week

Time Tracking	Other Resources	< November 2009 > <table border="1" style="font-size: small;"> <tr><td>Mon</td><td>Tue</td><td>Wed</td><td>Thu</td><td>Fri</td><td>Sat</td><td>Sun</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> </table>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6
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 [Sat 14/11/2009](#) |
 [Sun 15/11/2009](#) |
 [Summary](#)

Timesheet summary for week commencing Monday, 9 November 2009

Brent Ridge Development Pty Ltd

Brent Ridge Apartments (P3271)

Job Type	Date	Amount	Comment	Status	Submit
Drafting (DR)	13/11/2009	2.250 hours	Setup file structure. Load data from client.	Open	<input checked="" type="checkbox"/>
	2.250 hours				
Printing Drafting (PR)	13/11/2009	42.000 pages	Print draft design for review.	Open	<input checked="" type="checkbox"/>
	42.000 pages				
Structural Compliance (SC)	13/11/2009	3.750 hours	Stress analysis of steel beam superstructure for balconies	Open	<input checked="" type="checkbox"/>
	3.750 hours				

[Submit TimeSheet Entries](#)

Main Timesheet Summary Screen

Approving timesheets

Each timesheet entry can be edited for approved quantity and value before final approval if desired.

Timesheets are approved according to a set of user definable rules. Each project can be assigned individual approval rules if required. There is also the option of allowing 'auto approval' of timesheets should your organisation not require formal approval of timesheets.

Timesheet approval workpaths can be almost unlimited and allow any or all of specific people, or people in a specific role or relationship to the project to be part of the path.

Some common examples could be 'Manager of the user approves the timesheet' or 'All Project Managers' (of the project the timesheet relates to) must approve the timesheet.

Rules can be combined into steps and each step is then executed in sequence until the timesheet is either approved or rejected. There is no limit to the number of approval steps that can be added to a rule.

User	Date	Job Type	Comment	Act Qty	\$	App Qty	\$	
Ross DuPree	08/12/2008	Filing	Filed end of month paperwork.	0.250 hours	15.000	0.250 hours	15.000	
Samantha Jones	08/12/2008	General Admin	Set up timesheet project.	0.500 hours	55.000	0.500 hours	55.000	
Samantha Jones	08/12/2008	Timesheet Approval	Approve weeks timesheets for whole organisation	0.250 hours	0.000	0.250 hours	0.000	
Tania Coleman	08/12/2008	Print A4 Colour	Brochure proof	10.000 pages	3.500	10.000 pages	3.500	
Tania Coleman	08/12/2008	Conceptual design	Design brochure with client.	2.000 hours	70.000	2.000 hours	70.000	
Tania Coleman	08/12/2008	Photoshop	Image clean for brochure.	1.250 hours	56.250	1.250 hours	56.250	

Timesheet Approval

Extracting timesheet data for Invoicing or further analysis

TimeSuite provides a straightforward interface for exporting timesheet information to other business systems (eg accounting).

The timesheet download automatically creates a compressed (zipped) CSV (comma separated value) file and your browser will then allow you to save it to your local file system for further processing. In addition, the downloaded file is automatically saved to the built-in document management system within TimeSuite so that you can access it later if required.

For each timesheet entry, the downloaded CSV file contains the following information:

- Employee ID
- Employee Name
- Date
- Project Name
- Project Code
- Client Name
- Comment
- Job Type Name
- Job Type Code
- Cost Centre Name
- Cost Centre Code
- Unit of Measurement
- Actual Quantity
- Actual Value
- Approved Quantity
- Approved Value

User	Emp ID	Date	Job Type	Project	Comment	Act Qty	\$	App Qty	\$	
Ross DuPree	003	08/12/2008	Filing	TimeSheet Tracking	Filed end of month paperwork.	0.250 hours	15.000	0.250 hours	15.000	
Samantha Jones	0001	08/12/2008	General Admin	TimeSheet Tracking	Set up timesheet project.	0.500 hours	55.000	0.500 hours	55.000	
Samantha Jones	0001	08/12/2008	Timesheet Approval	TimeSheet Tracking	Approve weeks timesheets for whole organisation	0.250 hours	0.000	0.250 hours	0.000	
Tania Coleman	0002	08/12/2008	Print A4 Colour	TimeSheet Tracking	Brochure proof	10.000 pages	3.500	10.000 pages	3.500	
Tania Coleman	0002	08/12/2008	Conceptual design	TimeSheet Tracking	Design brochure with client.	2.000 hours	70.000	2.000 hours	70.000	
Tania Coleman	0002	08/12/2008	Photoshop	TimeSheet Tracking	Image clean for brochure.	1.250 hours	56.250	1.250 hours	56.250	

Timesheet Download

User and Organisation Management

This feature allows authorised users to manage the setup, login details (username & password), contact details, roles and relationships for all people and organisations associated with your organisation.

Individual users can also manage their own contact details. They cannot change roles or other security information.

New to this version of TimeSuite is the 'TimeSuite Assistant'. This feature guides you through creating and setting up user and organisation details in easy steps.

Organisation setup is almost identical to user setup. The main difference is that organisations cannot access the system in their own right, hence there are no Navigation roles, HR details or logins to manage.

The integrated address book contains contact information which is based on the information shown in the figure above. Personal details and financial information are not available to users accessing the address book information.

Custom Roles can be created to allow grouping of organisations or users for any reason. Examples could be to define people who should be invited to an annual sales event or perhaps to mark a group of clients as being likely to provide repeat business or to mark certain clients as continually making late payment of invoices.

Current details for user : Samantha Jones

User Status
Current user status : Active

Personal Details

Employee ID : 0001

Salutation : Ms

First name : Samantha

Middle Name :

Last name : Jones

Preferred name : Sammy

Date of Birth :

Business Details

Position title : Operations Manager

ABN :

Trading Name :

Min reqd hrs / week : 40.000

Default charge rate \$/hour : 90.000

Electronic Contact Details

Landline phone : 02 4966 0602

Mobile :

After hours phone :

Email : sjones@timesuite.com.au

Fax :

Pager :

[Update User Details](#)

Contact Address

Acme House
SYDNEY
NSW 2000
Australia

Postal Address

No postal address is currently specified.

Billing Address

No billing address is currently specified.

This section contains personal, contact and HR information. For example if the user is an employee, you can define the minimum hours to work per week plus default charge rates. If the user is a client, you can define ABN, Trading Name and invoice to addresses.

System Login Permissions

This user has system login permissions enabled.

Assigned Roles

Navigation Menu

- Project Team Member
Defines the user as able to belong to a project team.
- Support Contact
Allows access to the TimeSuite Support module. Only users assigned this role can contact TimeSuite online support.
- Timesheet Approver
Allows user to approve / reject timesheets
- Timesheet Plus Admin
Allows access to manage timesheet setup.
- Timesheet Plus User
Allows the user to enter timesheets plus view personal details.
- User Manager
Allows user access to the user maintenance system

Navigation Menu roles allow access to certain modules of TimeSuite. Users can only access the modules specified in this section and then only if they are assigned a valid login (above).

Relational

- Client
A person or organisation that requests the goods and / or services that an organisation or person provides in the normal course of business.
- Contractor
This party is a contractor to another party
- Employee
An employee of an organisation.
- Employer
A person or organisation that employs a person as an employee
- Goods and/or Services Provider
Defines the party as being a provider of good and or services to another party.
- Manager
Defines this user as a manager of another party.
- Team Member
Defines the user as able to belong to a team to which a manager is generally assigned.

Relational roles define the physical roles a user or organisation can act as or under. Relationships between these roles are defined below. Examples include Manager to Team Member and Employee of Employer.

[Update User Details](#)

Relationships

Samantha Jones (Sammy)	Director	Acme Consulting	Goods and/or Services Provider
Samantha Jones (Sammy)	Employee	Acme Consulting	Employer
Samantha Jones (Sammy)	Manager	Ross Dupree (Ross)	Team Member
Samantha Jones (Sammy)	Manager	Tania Coleman (Tanco)	Team Member
Samantha Jones (Sammy)	Manager	Wayne Robson (Wayno)	Team Member

User Management Form including addresses, roles, logins and relationship management

Custom roles will appear below the relational roles in the user and organisation management screens. To assign the user to this role, simply check the role name checkbox. User searches can then use this role as a filter parameter for example if you wanted to find all the people to invite to a sales event, just select all users with that role.

Customised User Summary Information (My Dashboard)

My Dashboard provides a summary of the whole system when you login.

Some of the information included is shown in the image below. The actual information available depends on the roles assigned to the user.

Each user can select whether or not to be shown each section of information.

Latest tasks worked on	Project	Status
initial Meeting	Brent Ridge Apartments (P3271)	In Progress
Test CNC Software	CNC System Development (P7219)	In Progress
Check factory space for system installation	CNC System Development (P7219)	In Progress

My Current Statistics

Last Login : 13/11/2009
14:57:59

[Open Tasks](#) : 4

[Active Projects](#) : 3

[Projects to invoice](#) : 4

[Overdue invoices](#) : 0

Timesheets to approve : 0

Timesheets to submit : 0

Timesheets outstanding : 3

You have 3 tasks which require your attention in the next week.

Your team members have 4 overdue tasks.

Your team utilisation for the next week.

Team Member	Open tasks	Standard Hours	Planned hours	Hours b/f	Unassigned hours	Utilisation (Next seven days)
Ross DuPree (RossD)	1	40.000	3.500	0.000	36.500	8.750%
Samantha Jones (Sam)	4	37.750	8.000	0.250	29.750	20.530%
Tania Coleman	4	37.500	12.000	0.000	25.500	32.000%
Wayne Robson	2	40.000	0.000	0.000	40.000	0%

One task which you raised to others is due for completion today or is outstanding.

Information that can be shown (depending on the users assigned roles) includes:

- Summary of recently worked on tasks.
- Summary of statistics such as open tasks, projects involved in, invoicable projects, overdue invoices, timesheets to approve, submit and unsubmitted timesheets.
- List of tasks the user should complete in the next seven days.
- Tasks the users team have not completed on time (applies to team managers).
- Team utilisation for the next week (applies to team managers).
- Tasks the user has raised for others to complete and which are currently outstanding or due today;
- Support tasks raised to TimeSuite support which are currently unresolved.

Managing Cost Centres and Job Types (Activity Codes)

You can create and maintain an unlimited number of Cost Centres and Job Types (activity codes) as required.

Cost Centres and Job types are containers to which budgets and timesheets are charged to. They are completely user defined and can be designed to match external systems for easy data export from TimeSuite to your existing accounting system for example.

Cost Centres and Job Types are hierarchical with the Cost Centre being the container for Job Types.

The interface is very straightforward both for creating new items and editing existing ones.

Updates to Cost Centres and Job Types are immediately reflected in what other users can see and are also immediately available to the Project Management system.

TimeSuite will not allow deletion of any Cost Centre or Job Type if it is currently in use (for example if users are currently assigned a charge out rate against this job type).

Invoicing and Payments Module (Optional module)

The Invoicing module allows you to create invoices either based on approved timesheets or as a blank invoice.

As each approved timesheet entry contains the information required to correctly charge your client, assembling the details of the invoice only takes seconds.

Client addresses and other information are drawn from the built in address book and automatically included in the invoice.

The invoice is created as a PDF document and can be automatically emailed to the client if desired.

All details of the invoice including any timesheet entries it is based on are easily viewable and can be reported on should your client require a detailed breakdown of the timesheets which comprise the invoice.

Payments can be separately recorded and reconciled with invoices providing at a glance information on unpaid and overdue invoices.

The invoice template can be user customised or we can design a custom template based on your existing stationery if you wish.

TimeSuite Free Trial

A free trial of TimeSuite is available. This free trial includes all features of the full version of TimeSuite and normally lasts for one month.

We can extend this period on request if you need more time to evaluate TimeSuite.

To set up your free trial of TimeSuite, please contact us by email or telephone.

We can also provide a free online guided tour in conjunction with your free trial of TimeSuite if you wish. This normally takes 1 to 2 hours depending on local internet connection speeds. The guided tour will show you how to setup the system to suit your business and also how to use the features of the system.

On site demonstrations are available at your premises on request.



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