



“ Suite: a collection of integrated modules functioning as a single program, each module incorporates data from the others, eliminating the need for re-entry or transfer of data ”



## TimeSuite : TimeSheets Plus

TimeSheets Plus is optimised for small and medium organisations who need an integrated system to manage contacts and allow entry and approval of timesheets and export this information to other systems.

With the ability to define charge out rates for every user to multiple cost centres and job types at any point in time, you can easily track time and expenses to any employee or cost centre.

Timesheets can be created, submitted and approved in minutes.

Timesheet information can quickly and easily be downloaded to external systems.

TimeSuite automatically sends reminders to users who have not submitted their timesheets or whose hours do not match the minimum hours specified.

Reminders are also sent to timesheet approvers who have not approved timesheets.

**Timesheet entry** is straightforward. Simply select the date, job type and enter the hours. Click save and the data is stored.

Users can edit details of the timesheet up until the point when they submit it.

Timesheet approvers can edit the approved quantities and values of each timesheet before approval, or can reject the timesheet.

Actual information is still retained for analysis even if approved values are changed.

**Built in roles** control what features each user can access within the system.

**Downloading information** to an external system is a breeze.

Simply select the approved timesheets to download and TimeSuite creates a CSV file ready for you to download and import into your accounting package or other system.

**Custom roles** allow you to group organisations and individuals for marketing strategies or even just to send out newsletters.

As your organisation grows or increases in complexity, you can upgrade to more advanced TimeSuite packages.

Your information is retained during the upgrade, there is no need for data re-entry or expensive transfer between systems.

**Contact Management** is easy with TimeSuite. All your organisation contacts, both internal and external, are stored in one location.

Only authorised users can access this information. No need for multiple copies of contact information.

Advanced role relationship management allows you to easily build internal chains of responsibility, categorise people or clients and manage external contacts in a similar fashion.

This information can be used in a variety of ways ranging from searching for users to generating an organisation chart or for detailed marketing analysis.

### TimeSuite Manages

- Timesheets
- Reminders
- Contacts
- Charge Rates
- Data Approval
- Data Export
- Security
- Cost Centres
- Job Types

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

### TimeSuite contact details :

web : [www.timesuite.com.au](http://www.timesuite.com.au)  
email : [enquiries@timesuite.com.au](mailto:enquiries@timesuite.com.au)  
tel : 02 4966 0602

The following TimeSuite Example Relationship Diagram shows how TimeSuite can be used to model relationships between users and organisations both internal and external to your organisation.

Organisation 1 is the primary group, and represents your own organisation. This example organisation has the roles of Employer, Client and Goods and Services Provider.

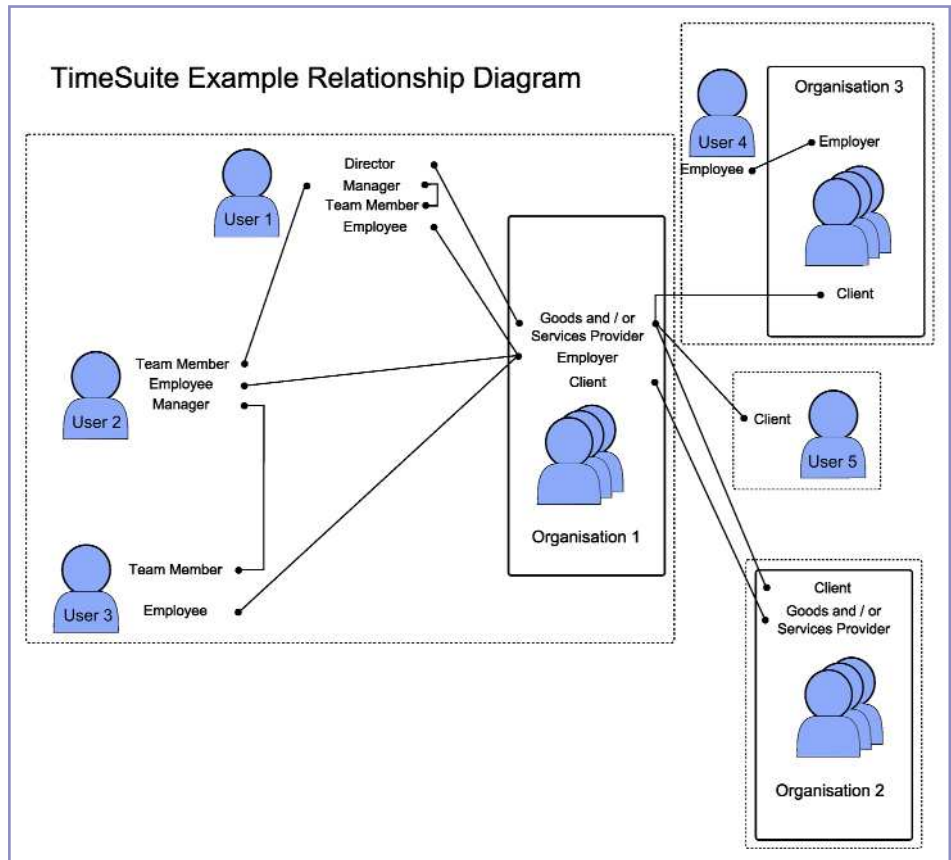
User 1 is the sole director of the organisation, is manager of User 2 and themselves and is an employee of Organisation 1.

User 2 is a team member under User 1 as Manager and manages User 3.

Organisation 2 is both a client and Goods and services Provider to Organisation 1.

Organisation 3 is a client of Organisation 1. User 4 is an employee of Organisation 2.

User 5 is a client of Organisation 1, however in this case is a client as a person rather than an organisation.



Example Relationship Diagram

### Entering Timesheets is quick and easy.

The timesheet entry interface opens on the current timesheet week and day. Users select the date for the entry, enter the job type code (or click the job code selector), enter the quantity and click 'Save Timesheet'.

*Timesheet details for : Samantha Jones - Week commencing 08/12/2008*

< December 2008 >						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	29	30
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	31	1	2	3	4

Date	Job Type	Quantity	Appvd	Comment	Status
08/12/2008	General Admin (ADM)	0.500 hours	0.500 hours	Set up timesheet project.	Approved
09/12/2008	General Admin (ADM)	1.250 hours	1.250 hours	OH&S Meeting	Open
08/12/2008	Timesheet Approval (TS)	0.250 hours	0.250 hours	Approve weeks timesheets for whole organisation	Approved

**Submit TimeSheet Entries**

**New Timesheet entry**

Tuesday, 9 December 2008

Comments :  
Characters remaining : 4000

Save Timesheet

Timesheet Entry Form

Users may then edit the details as required, or delete the timesheet if necessary.

Timesheets can be entered 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.

### Submitting timesheets is even quicker.

Select the entries to submit and click the 'Submit Timesheet Entries' button. Once submitted, the timesheets are queued for approval according to defined approval rules.

Using the Timesheet Approval module of TimeSuite, authorised timesheet approvers can approve timesheets at any time. There is no need to wait for the end of the week.

**Approving timesheets** using the Timesheet Approval module is also a 'one click' operation.

Review and Approve Timesheets										
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			<input checked="" type="checkbox"/>
Samantha Jones	08/12/2008	General Admin	Set up timesheet project.	0.500 hours	55.000	0.500 hours	55.000			<input checked="" type="checkbox"/>
Samantha Jones	08/12/2008	Timesheet Approval	Approve weeks timesheets for whole organisation	0.250 hours	0.000	0.250 hours	0.000			<input checked="" type="checkbox"/>
Tania Coleman	08/12/2008	Print A4 Colour	Brochure proof	10.000 pages	3.500	10.000 pages	3.500			<input checked="" type="checkbox"/>
Tania Coleman	08/12/2008	Conceptual design	Design brochure with client.	2.000 hours	70.000	2.000 hours	70.000			<input checked="" type="checkbox"/>
Tania Coleman	08/12/2008	Photoshop	Image clean for brochure.	1.250 hours	56.250	1.250 hours	56.250			<input checked="" type="checkbox"/>

Timesheet Approval

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

Select the entries to approve and click the 'Approve Timesheet' button. Rejecting a timesheet is just as easy. Rejected timesheets are sent back to the originator and can be edited for resubmittal or deleted as required.

At the start of the timesheet week, TimeSuite will automatically send email reminders to users who have unsubmitted timesheets for the previous week (or have not submitted sufficient time to meet their required minimum hours that week) and also to approvers who have not approved timesheets submitted for the previous week.

Download Approved Timesheets										
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	<input checked="" type="checkbox"/>
Samantha Jones	0001	08/12/2008	General Admin	TimeSheet Tracking	Set up timesheet project.	0.500 hours	55.000	0.500 hours	55.000	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>
Tania Coleman	0002	08/12/2008	Print A4 Colour	TimeSheet Tracking	Brochure proof	10.000 pages	3.500	10.000 pages	3.500	<input checked="" type="checkbox"/>
Tania Coleman	0002	08/12/2008	Conceptual design	TimeSheet Tracking	Design brochure with client.	2.000 hours	70.000	2.000 hours	70.000	<input checked="" type="checkbox"/>
Tania Coleman	0002	08/12/2008	Photoshop	TimeSheet Tracking	Image clean for brochure.	1.250 hours	56.250	1.250 hours	56.250	<input checked="" type="checkbox"/>

Timesheet Download

**Approved timesheet data can be downloaded using the TimeSheet Download module.**

Downloading Timesheets involves selecting the entries to download (all entries are selected by default) and clicking the 'Download TimeSheets' button.

TimeSuite will automatically create a compressed 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.

The downloaded CSV file contains the following information for each timesheet entry :

- 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 / Organisation Management** is straightforward. Only authorised users can access the user and organisation details screens where personal and contact details, logins and roles and relationships can be managed on an individual basis.

*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 :

**Contact Address**  
 Acme House  
 SYDNEY  
 NSW 2000  
 Australia

**Business Details**

Position title : Operations Manager  
 ABN :  
 Trading Name :  
 Min reqd hrs / week : 40.000  
 Default charge rate \$/hour : 90.000

**Postal Address**  
 No postal address is currently specified.

**Electronic Contact Details**

Landline phone : 02 4966 0602  
 Mobile :  
 After hours phone :  
 Email : sjones@timesuite.com.au  
 Fax :  
 Pager :

**Billing Address**  
 No billing address is currently specified.

**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

**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.

**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

**Update User Details**

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.

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 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.

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

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 address book features contact information which is based on the information shown in the graphic above. Personal details and financial information are not available to users using the address book. In addition, no information can be changed via the address book.

**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.

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.

**Managing Timesheet tracking setup** is also a simple task. The 'TimeSuite Assistant' will guide you through the steps required to manage setup and changes to setup of the timesheet tracking project.

Timesheet setup and management uses features from the TimeSuite Project Management modules (the full version is only available in more advanced subscriptions) to allow complete management of all aspects required.

Setup of the project allows you to manage the personnel who will be entering timesheets, the cost centres and job types that will be tracked and allows setup of individual charge out rates per job type. These rates can also be varied over time and even entered in advance if known.

All valid rates can be modified eg for date range and rate. TimeSuite will not allow date period overlaps, so there can be no confusion between rates.

Timesheets entered are costed at the rate specified on the day they relate to.

Define rates for project : Website for Coffee Unlimited

Start
1 - Project details
2 - Personnel involved
3 - Job Types
4 - Set up rates
Complete

*Step 4 - define chargeable rates for this project.*

FAD	C#	GD1	SQL01	TT	TVKM
<b>Unassigned personnel</b>		<b>Rate assigned personnel</b>			
Wayne Robson (Wayno) [Project Manager]		Samantha Jones		Charge out rate	Valid from
Ross Dupree (Ross) [Project Director]		Tania Coleman		\$90.000 / hour	02/09/2008
		Tania Coleman		\$45.000 / hour	27/08/2008 03/11/2008
		Tania Coleman		\$35.500 / hour	04/11/2008 03/12/2008
		Tania Coleman		\$35.500 / hour	05/12/2008 -
				0.00 / hour	8/12/2008
				Assign Rate	

Finish project setup

User Charge Out Rates

The graphic above shows the charge rate setup screen.

The Timesheet Management dashboard shown to the right allows you to edit specific aspects of the project setup and also view details of the project with one click of your mouse.

The upper row of icons allows you to edit

- Personnel;
- Job Types;
- Charge Rates; and
- Timesheet Approval rules

Project Details

Project Name : TimeSheet Tracking  
 Project Type : Timesheet  
 Client : Acme Consulting  
 Project Description : Default TimeSheet Tracking Project.  
 Timesheet Approval Rule : Manager Approves Timesheet  
 Created by : TestUser2 on 18/09/2008  
 Start Date : 18/09/2008  
 End Date : -  
 Status : Active

**Modify Project Setup**

**View Project Details**

The lower icons allow you to view detailed information for

- Personnel involved plus role assigned (admin or user);
- Charge out Rates; and also to
- Search Timesheet Entries

**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 shown depends on your assigned roles and can also be customised.

Each user can select whether or not to be shown each section of information using the **'My Preferences'** screen.

**My Current Statistics**

Last Login : 12/12/2008 11:32:03

Timesheets to approve : 1

Timesheets to submit : 1

Timesheets outstanding : 0

**Your timesheet Summary for this week.**

Date	Job Type	Quantity	Appvd	Comment	Status
08/12/2008	General Admin (ADM)	0.500 hours	0.500 hours	Set up timesheet project.	Approved
09/12/2008	General Admin (ADM)	1.250 hours	1.250 hours	OH&S Meeting	Open
12/12/2008	General Admin (ADM)	0.500 hours	0.500 hours	Research upgrade to TimeSuite 'Timesheets Plus' plan.	Awaiting Approval
08/12/2008	Timesheet Approval (TS)	0.250 hours	0.250 hours	Approve weeks timesheets for whole organisation	Approved

**Open Support Requests raised by your group. (some may be duplicated if they have not been allocated to a technician).**

Ticket #	Created by	Date raised	Task	Priority	Latest Action	Status
55	Samantha Jones	12/12/2008	Upgrading plans	High	Accepted by LTester	Open

Personalised Dashboard

**Managing Cost Centres and Job Types** is included in the TimeSheets Plus plan. You can create and maintain an unlimited number of Cost Centres and Job Types as required.

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 Timesheet Project Setup.

*Update the details of this job type.*

Cost Centre : Administration

Job Type Code : ADM

Job Type Name : General Admin

Job Type Description : General Admin

Unit of Measurement : hour

Job Type Tracks Time ONLY? :  Yes  No

Update Job Type

Editing a Job Type

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).

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# **Timesheets Plus by TimeSuite**

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## **System Features**

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- Roles Based Security
- SSL Security secures data in transit
- Online helpdesk
- Constant development and upgrade
- Web-based - no software install required
- Custom Roles
- Upgradable
- 'At a glance' Dashboards
- TimeSuite Assistant and Help System
- User can manage own contacts
- Unlimited user defined cost centres
- Unlimited user defined job types

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## **Included Modules**

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- Contacts Management
- Timesheet Entry Management
- Reminders
- Custom Roles Management
- User Management
- User Preferences / Customisation
- Timesheet Approval Module
- Timesheet Download Module

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## **Optional Modules**

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- Additional User Licences

## Plan Comparisons

	Quick Timesheets	Timesheets Plus
Included user licences	10 <sup>1</sup>	25 <sup>1</sup>
Included Cost Centres	5 <sup>2</sup>	Unlimited
Included Job Types	25 <sup>2</sup>	Unlimited
Monthly payment option	✓	✓
Annual payment options	✓	✓
Contacts Management	✓	✓
Relationship Management	✓	✓
Custom Roles	✓	✓
Helpdesk / Support	✓	✓
Timesheet Entry	✓	✓
Timesheet Approval	✓	✓
Timesheet Export	✓	✓
Manage Cost Centre and Job Type details <sup>3</sup>	✓	✓
Define User Charge Out Rates	✓	✓
Automatic Email Reminders	✓	✓
Continuous Development and updates	✓	✓
<b>Options</b>	✓	✓
Extra Users (in blocks of 5)	✓	✓
Timesheet Approval Module	✓	✓
Timesheet Export Module (includes Approval Module)	✓	✓
Additional Cost Centres or Job types	✓	✓

### NOTES

1 The number of members of your organisation that can be granted logins. Extra licences can be purchased in blocks of 5 on the same basis as your primary subscription. Annual subscriptions will be charged pro-rata to your existing subscription to maintain anniversary date.

2 Additional Cost Centres and Job Types can be added later if desired.

3 Organisations on QuickTimesheets plan must request changes to Cost Centres and Job Type details (such as adding new ones or changing names) as a Support Request. Charges apply for this if your initial setup exceeds the standard quantities allowed OR if you request any changes after initial setup is completed.

✓ = Included



= optional