Preempt Quick Start Guide

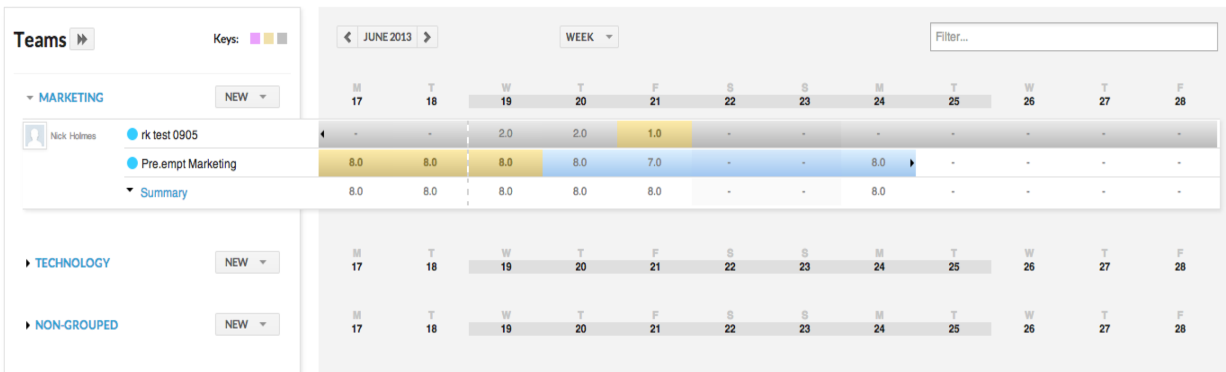
Preempt is a simple and interactive tool to keep your planned work and your actual work in sync. It makes sure your colleagues and managers are always up-to-date on what the team is working on.

You can get help anywhere in the app by clicking ‘Help’ at the top right of the screen. If you need further assistance, please contact jgasteen@precursive.co.uk or visit the online support facility at https://precursive.zendesk.com/home.

There are 4 basic parts to Preempt:

1. **Projects** - create new projects
2. **Scheduling** - add teams to projects
3. **Timesheets -** recording the hours worked on a project
4. **Reporting (Admin Only) -** get real time reporting, which can be emailed

Scheduling



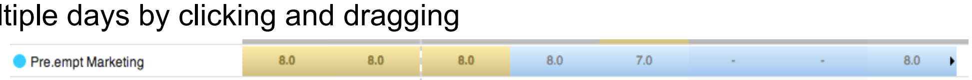
How often should I update my schedule?

1. Ideally as soon as you are aware of a change or before each day at work

How do I update my schedule?

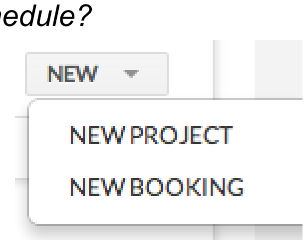
1. On the Scheduling tab, click the ‘Summary’ link next to your name to show details of the items you are booked against

2. Click the block that represents the day that you wish to change. You can easily schedule multiple days by clicking and dragging



3. Enter the new hours per day and click ‘Confirm’ to save the information

How do I add a new item to my schedule?



1. Either click ‘New’ > ‘New Booking’ or click the ‘Summary’ row of the person you want to book
2. Select the project, the person, start and end dates and click ‘Confirm’

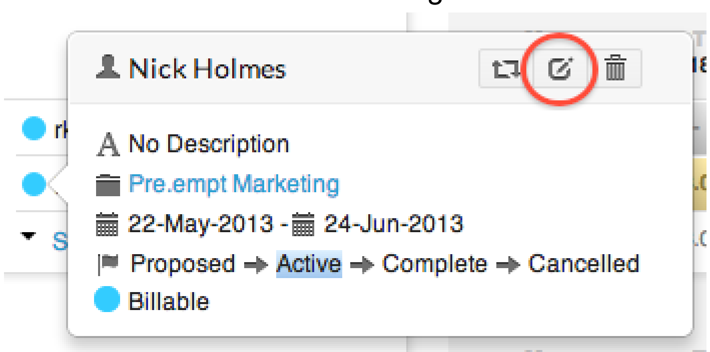
3. Click and drag the hours you wish to allocate to this new project

How do I make a role active?

1. Click on the user, then 'Summary'
2. Hover over the circle icon and click 'edit'
3. Change the status to active and click 'save'

How do I change an existing project booking?

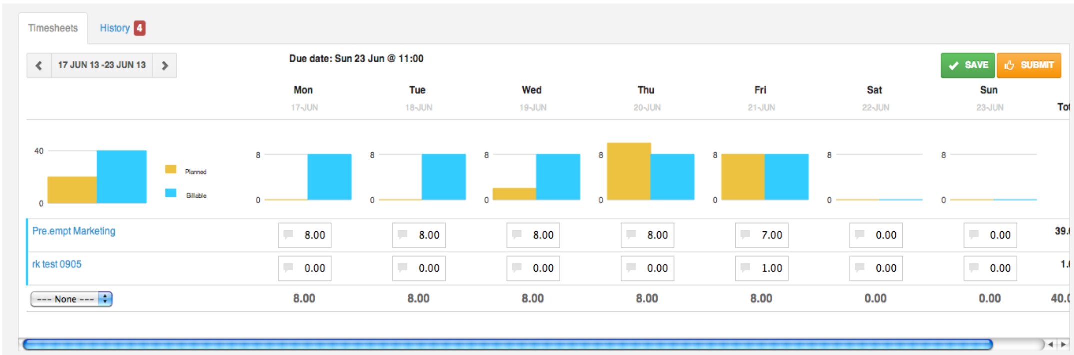
1. Open the bookings by clicking 'Summary'
2. Hover over the circle icon to show the booking information and then click the edit icon



3. Update the details and click 'Confirm' to save

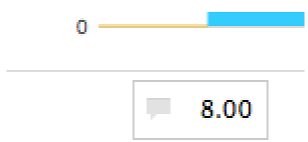
Timesheets

Timesheet



How do I enter the time I actually worked?

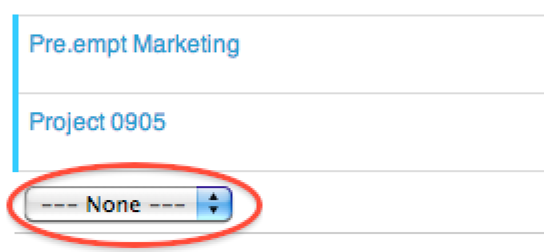
1. Click on the ‘Timesheets’ tab and select the week you wish to record
2. Select the cell you wish to update with the actual hours you worked. The planned hours will be set up for you as a default. Edit the number if required



3. Click the speech bubble to add a comment against each time entry if required
4. Enter all of your hours and click ‘Save’

How do I add an unplanned project?

1. Ask your project manager to add you to the project
2. Select the project from the drop down menu at the bottom left of the screen



3. Enter your actual time

How do I add holidays?

1. Select ‘Holiday’ from the drop down list at the bottom left of the screen

2. Enter holiday time as you would regular hours
3. Click ‘Submit’

How do I submit my timesheet?

1. Once you have entered time which covers your required hours per week and hours per day, click the yellow ‘Submit’ button. Your timesheet will be submitted to your manager to approve

How do I recall a timesheet?

1. You may recall a timesheet to allow you to edit it after the timesheet has been submitted, but only if it had not been approved or rejected
2. Click ‘Recall’, which appears after the timesheet has been submitted, to reopen the timesheet for editing.
3. Submit it again as usual after your edits by clicking ‘Submit’

(Admin) Projects

How do I set up a new project?

1. Click the ‘Projects’ tab
2. Click ‘New Project’ and enter name, start date and end date
3. Click ‘Save’, or click ‘Save and edit’ if you need to add more details or a budget

How do I set the project type (Billable / Non Billable)?

1. This is admin-only functionality accessed from the ‘Codes’ tab
2. Find the project in the list of codes
3. Click ‘Edit’ and change the type
4. Click ‘Save’

How do I set up public codes for booking time?

1. Click ‘Codes’ tab
2. Click ‘New’
3. Enter type and details
4. Click ‘Public’ checkbox to allow all users to book time to this code
5. Click ‘Save’

How do I set up the project budget?

1. Select the project you wish to set up a budget for
2. Click the project name
3. Select ‘Edit’
4. Enter the number of total days budgeted for the project
5. Click ‘Save’