

HRMS - Time Management User Guide

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Introduction

HRMS's Time Module is a unique Timesheet Management tool. Managers can configure project details and add Employees to projects. They can view timesheets of the Employees reporting to them in a daily, weekly or monthly view format. Employees can enter the hours spent on an assigned project. Employee and project based time reports can be generated based on the details entered by the Employees.

Time Management Settings Configuration

Before your Employees can start filling the timesheets, as a Super Admin you must configure the following

aspects:

Add Clients

Add Projects

Add Default Tasks

Configuration

- Weekly Submission Reminder
- Timesheet Blocking Range

How do I add Clients?

Provide the basic information about your clients.

Select the option **Clients** from the Time module's menu. Click on the **+ Add** button.

The screenshot shows the 'Add Client' form within the 'Time Management Settings Configuration' interface. The breadcrumb trail at the top left reads 'Home > Time > Clients > Add'. A 'Back to Dashboard' link is in the top right. A blue navigation bar contains tabs for 'Time Sheet', 'Employee Time Sheets', 'Clients' (highlighted in yellow), 'Default Tasks', 'Projects', and 'Configuration'. The form fields are arranged in two rows. The first row includes 'Client *' (labeled 'a'), 'Address' (labeled 'b'), 'Country' (labeled 'c' with a 'Select Country' dropdown), 'State' (labeled 'd' with a 'Select State' dropdown), and 'Email' (labeled 'e'). The second row includes 'Phone Number' (labeled 'f'), 'Fax' (labeled 'g'), and 'Point of Contact *' (labeled 'h'). At the bottom left, there are 'SAVE' and 'Cancel' buttons.

Figure 1

* - Denotes mandatory fields

- a. Client name*
- b. Client location
- c. Country the client is located in
- d. State the client is located in
- e. Client email address
- f. Client phone number
- g. Client fax number
- h. Name of the point of contact from client side*

How do I add Projects?

Under the section there are 3 steps:

- 1. Configure project details:** Provide information about the project.

Home > Time > Projects > Add

Back to Dashboard

Time Sheet | Employee Time Sheets | Clients | Default Tasks | **Projects** | Configuration

Step 1: Project
Configure the project details and define the project type along with the estimates

Step 2: Tasks
Add the project related tasks, provide estimates, billable rate per hour and assign the resources

Step 3: Resources
Add the project related resources, provide billable & cost rate, and assign tasks

Configure Project Details BACK

Project * **a** Status **b** Base Project **c** Client * **d** Currency * **e**

Project Type * **f** Estimate **g** Description **h**

☐ Billable ☐ Non Billable ☐ Revenue

Dates: [] To [] Estimation Hours: []

300 characters remaining (1000 maximum)

SAVE Cancel

Figure 2

* - Denotes mandatory fields

- a. Project Name*
- b. Status of the Project E.g.: Initiated, In Progress, Completed etc.*
- c. The parent project name on which the current project is based on
- d. Client Name*
- e. Currency used in the project*
- f. Type of the project on basis of the income type *
- g. Estimated duration of the Project
- h. Project Description

SAVE

the details to move onto the next step.

2. Add Project related tasks: Add the various tasks which are performed by the Employees in the project

When you are configuring a task for the first time, you will see the below message:



After clicking on the hyperlink, a pop up window will open.

A screenshot of a web-based "Add Tasks" dialog box. The title bar at the top is grey and contains the text "Add Tasks" on the left and a red "X" close button on the right. The main content area has three radio buttons at the top: "Default Tasks", "Frequently used Tasks", and "New Task". The "New Task" radio button is selected. Below the radio buttons is a text input field labeled "Name *". Underneath the input field is a checkbox labeled "Default Task". At the bottom left of the dialog are two buttons: a blue "ADD" button and a grey "Cancel" button.

Figure 2.1

- Default Tasks - The default tasks that had been set up in the 'Default Tasks' tab (you can create a default task here also by selecting the checkbox 'Default Task' while creating a new task)
- Frequently Used Tasks - The tasks frequently used in different projects will be populated here
- New Task – For a particular project only, a new task can be added here

Choose the task category you want by selecting the radio button.

You can then fill in the Estimated Hours and Billable Rate of each task which you have added.



The screenshot shows a web application interface for managing tasks. At the top, there is a search bar labeled "Search by Task" with a magnifying glass icon. Below the search bar is a table titled "Tasks". The table has five columns: "Name", "Estimated hours", "Billable Rate/hr(INR)", "Billable", and "Actions". There are two rows in the table: "Active Task" and "General task". Each row has input fields for "Estimated hours" and "Billable Rate/hr(INR)", a "Billable" checkbox, and an "Actions" column with icons for adding, editing, and deleting. An orange "+ Add Task" button is located in the top right corner of the table.

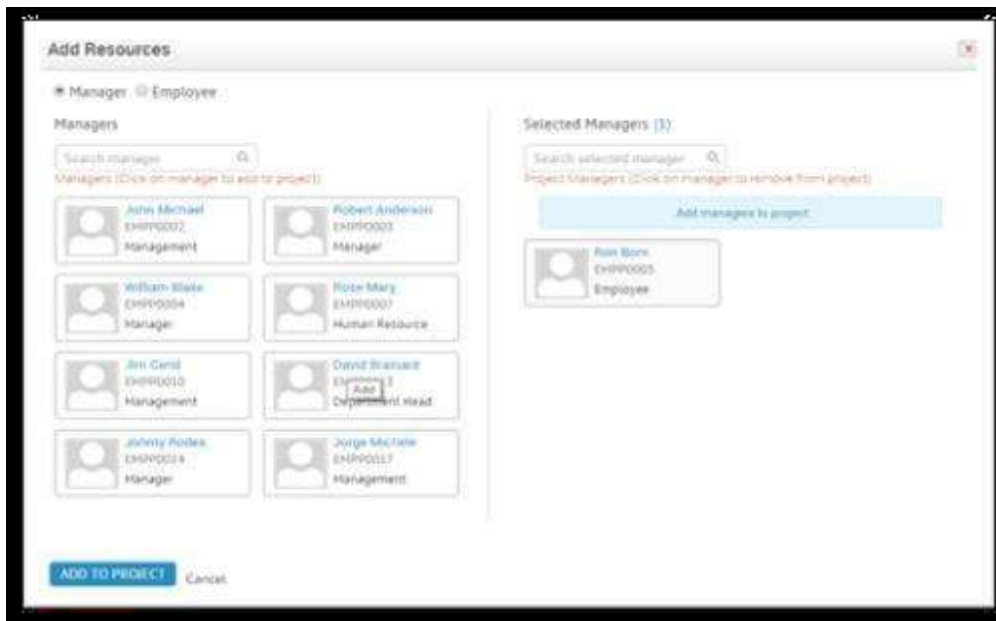
| Name | Estimated hours | Billable Rate/hr(INR) | Billable | Actions |
|--------------|----------------------|-----------------------|--------------------------|---|
| Active Task | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |    |
| General task | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |    |

Figure 2.2








3. Add resources to Projects: You can add Managers/Employees to the project. When you are adding resources for the first time you will see the below message.



After clicking on the hyperlink, a pop up window will open.



The screenshot shows a pop-up window titled "Add Resources". At the top, there are two radio buttons: "Manager" (selected) and "Employee". Below this, there is a "Managers" section with a search bar and a list of managers. Each manager entry includes a profile picture, name, ID, and role. To the right of the managers list is a "Selected Managers (1)" section with a search bar and a list of selected managers. At the bottom left, there is a blue "ADD TO PROJECT" button and a "Cancel" link.

| Managers | |
|---|---|
|  John Michael EMP0002 Manager |  Robert Anderson EMP0003 Manager |
|  William Stone EMP0004 Manager |  Rose Mary EMP0007 Human Resource |
|  Jim Carl EMP0010 Management |  David Branson EMP0011 Department Head |
|  Johnny Rodas EMP0014 Manager |  Jorge McTate EMP0013 Management |


| Selected Managers (1) | |
|---|--|
|  Ron Bork EMP0005 Employee | |

Figure 2.3

Click on the Manager/Employee you wish to add to the project and then the name will appear on the right side column as selected Managers/Employees. Click on ADD TO PROJECT

After the resources have been added the Super Admin/Manager can fill in the billable rate & cost rate.

Figure 2.4

a. Add more resources

b. Assign tasks to resources and on clicking this option a pop up (shown below) window will open.

Figure 2.5

a. You can filter the tasks displayed by clicking on a radio button (Unassigned/Assigned/All)

b. After selecting the tasks you wish to assign to the resource, click on **ASSIGN TASK**

How do I add Default Tasks?

Add the various default tasks performed by the Employees in your organization. E.g.: Developing, Documentation, Testing etc.

Select the option **Default Tasks** from the Time module's menu. Click on the **+ Add** button.

Figure 3

* - Denotes mandatory fields

a. Enter the various default tasks existing in your organization one by one and **SAVE** each task*
(default tasks are not editable but can be deleted if not assigned to any Employee)

How do I configure the weekly reminder and timesheet blocking range?

Weekly Submission Reminder

Set a day in a week to send email notifications to your workforce to remind them about filling their timesheets and sending them for approval.

Timesheet Blocking Range

Define a time period within which the Employees' timesheet will be blocked for a month. HRMS offers you two options to accomplish this feature:

1 - End of month

- By the end of every month, all Employees must submit their timesheets
- Two days of grace period i.e. 1st and 2nd of the next month, are provided to the Employees to submit their timesheets. On the 2nd of every month, a notification will be sent as a reminder about blocking the timesheet.
- On the 3rd of every month, if the Employees have not submitted their timesheets, their previous month's timesheet will be blocked.

26th previous month - 25th next month

- By the 25th of every month, all Employees must submit their timesheets.
- Two days of grace period i.e. 26th and 27th of the next month, are provided to the Employees to submit their timesheets. On the 27th of every month, a notification will be sent as a reminder about blocking the timesheet.

- On the 28th of every month, if the Employees have not submitted their timesheets, their previous month's timesheet will be blocked.

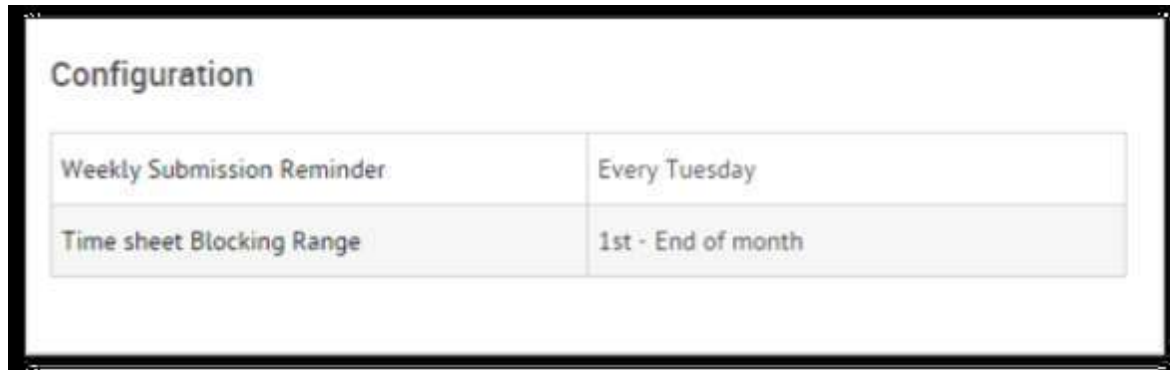


Figure 4

Figure 4.1

- Click on **Time** in the header menu.
- Click on **Configuration** in the Time menu.
- Click on **EDIT** to setup the configurations
- Select a day from the dropdown for Weekly Submission Reminder
- Select an option to determine your monthly timesheet block range
- Click on **SAVE** to apply these changes to your entire organization (editable later)

Can the Super Admin fill timesheets?

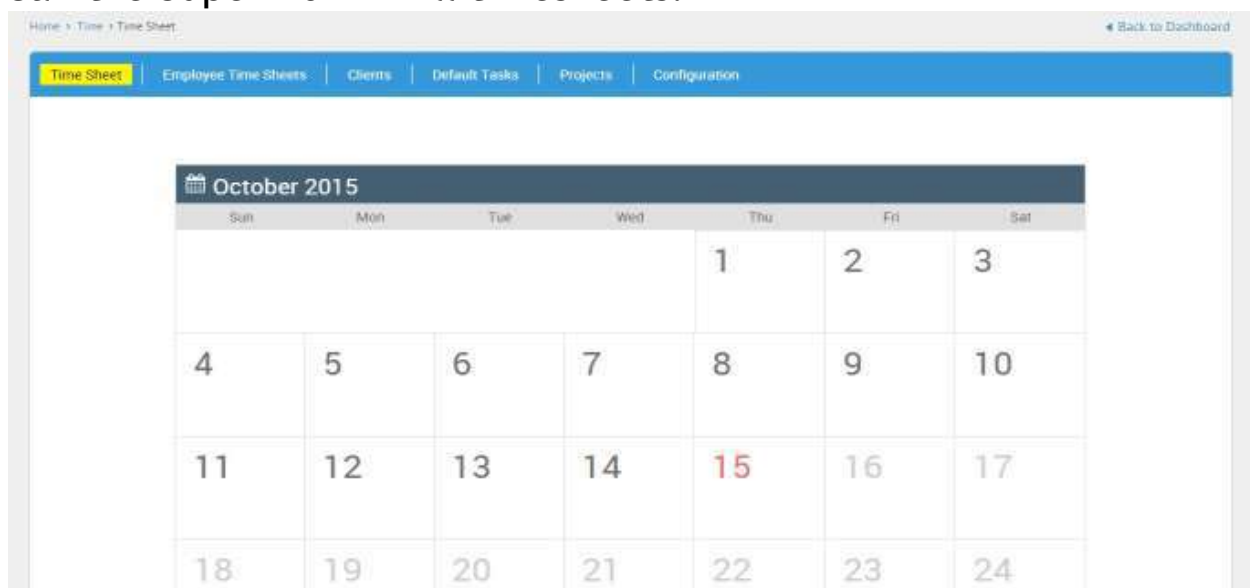


Figure 5

The Super Admin can view the current month's calendar and can't fill in timesheets unlike rest of the users.

Can the Super Admin Approve/Reject Employee Timesheets?

The Super Admin can view the timesheets of all Employees and can also Approve/Reject them.

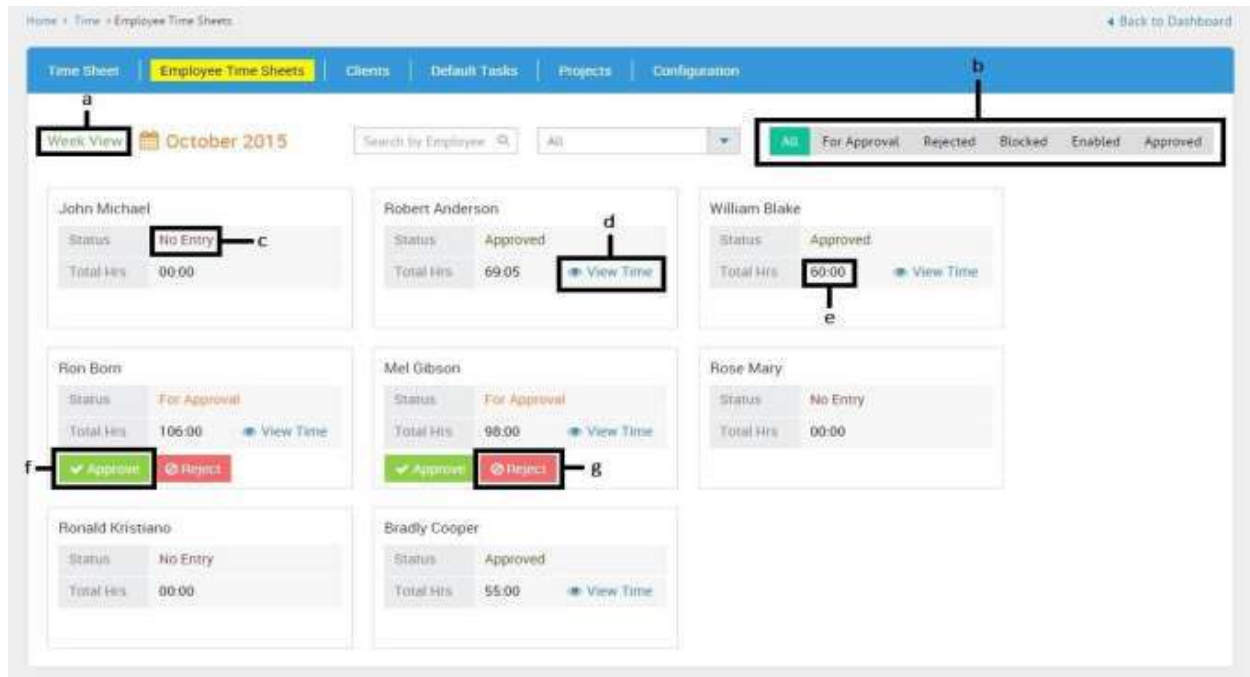


Figure 6

- a. The view type (Weekly/Monthly). Click on the word Weekly View to change it to Monthly View mode.
- b. Categories based on status of Timesheet
- c. Timesheet status (No Entry, Approved, Rejected etc.)
- d. View the Timesheet in detail
- e. Total no. of hours worked
- f. Approve Timesheet
- g. Reject Timesheet

The Figure 6.1 shows the Weekly view options, in which the Timesheets of the Employees can be viewed for each week of the month.



Figure 6.1

After completing all the above mentioned steps, your Time module is now ready to use.

What is the role of a Reporting Manager in Time module?

Note: Reporting Managers can belong to any role (Management/Manager/HR/Employee/System Admin) as long as they have Employees reporting to them.

A Reporting Manager has access to all the functions like the Super Admin, except for the '**Configuration**' function.

Reporting Managers have an extra feature of viewing the list of Employees who haven't submitted their timesheets yet.

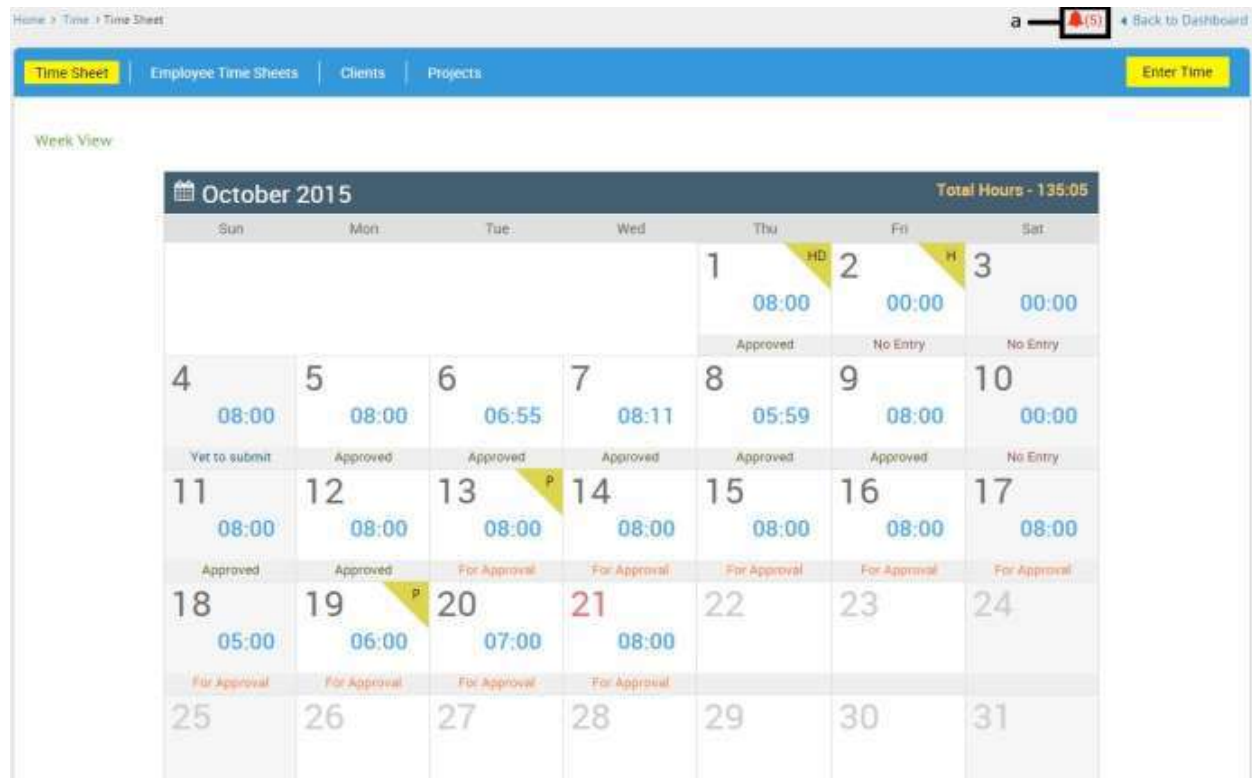


Figure 7

a. Click here to view the list of Employees who haven't submitted their timesheets. The number in the parentheses () denotes the number of Employees in the list.

Weekly View for Pending Submissions:



Figure 7.1

Monthly View for Pending Submissions:

Home > Time > Pending Submissions

Time Sheet | Employee Time Sheets | Clients | Projects

Enter Time

Week | **Month**

October 2015

Pending Submissions:

| Employee | Week-1 | Week-2 | Week-3 |
|-------------|---------------|---------------|---------------|
| Ron Born | Submitted | Submitted | Yet to Submit |
| Rimny Jim | Yet to Submit | Yet to Submit | Yet to Submit |
| Jony tydia | Approved | Yet to Submit | Yet to Submit |
| Rony Joet | Yet to Submit | Yet to Submit | Yet to Submit |
| Cheryl Jone | Yet to Submit | Yet to Submit | Yet to Submit |

Figure 7.2

How do I fill in timesheets?

When you log in to your HRMS account and navigate to the Time module, this is how the screen will appear:

Time Sheet | Projects

Enter Time

Your time sheet has been approved. View Details

Week-3 time sheet(s) of October has not been submitted.

Week View

October 2015

Total Hours - 32:00

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----------|----------|----------|----------|----------|----------|----------|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| | | | 08:00 | 08:00 | 08:00 | 08:00 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 00:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| No Entry | No Entry | No Entry | No Entry | No Entry | No Entry | No Entry |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 00:00 | 00:00 | | | | | |
| No Entry | No Entry | | | | | |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Figure 8

- a. Will redirect you to the screen where you can fill in the timesheets
- b. Shows the the weekly timesheets (For viewing purpose only)
- c. Total number of hours worked by you **in a month**
- d. Total number of hours worked by your **in a day**
- e. Status of the timesheet e.g.- Approved
- f. Status of the timesheet e.g.- No entry

You will see the following message if your timesheet has been approved:



If you've not filled in the timesheet for a particular week, you will find the following message:



If you want to enter hours into the timesheet, you should click on **Enter Time** and the following window will open:

Figure 8.1

- a. Reminders for filling in timesheets
- b. You can change to whichever week you want
- c. Daily notes/comments (You can give details about the tasks and the number of hours for the day)
- d. Project name
- e. Task name
- f. Weekly notes/comments (You can give details about the tasks and the number of hours for the week)
- g. Saves the timesheet (can be modified even after saving)
- h. Saves & submits the timesheet for approval

How do I view Projects assigned to me?

Click on **Projects** to view the projects to which you have been added to and to view the project details.

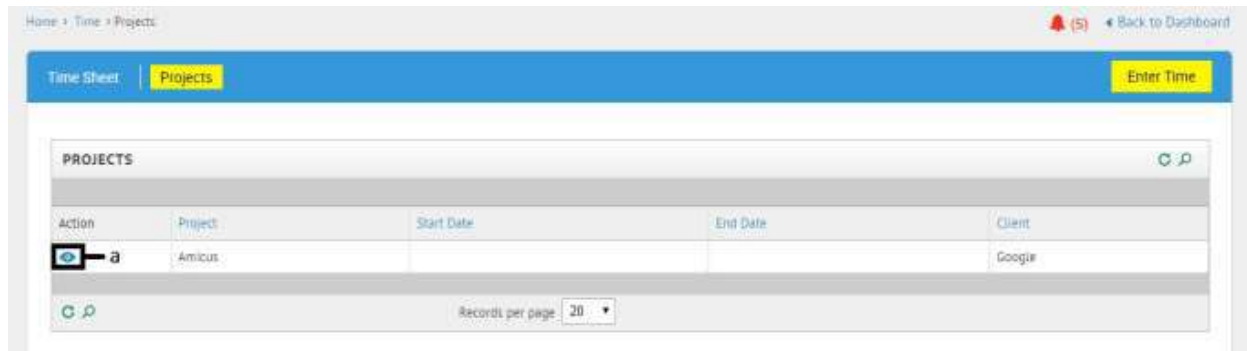


Figure 8.2

a. Click on this icon to view the details of the project.

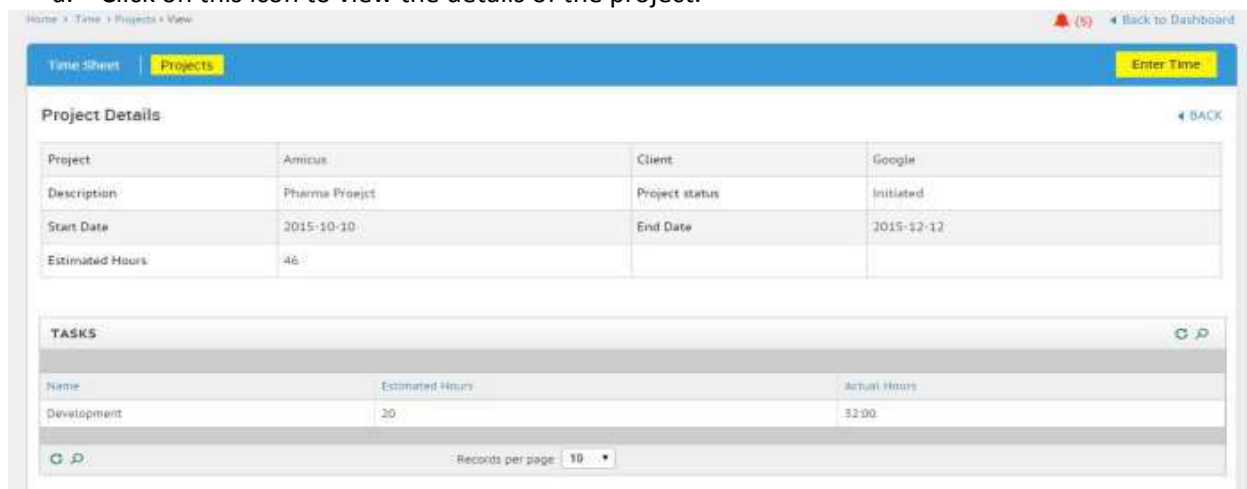


Figure 8.3

The above figure shows the details of the Project. The details are added by the Super Admin/Manager.