

Sentrifugo - Time Management User Guide

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Introduction

Sentrifugo's Time Module is a unique Timesheet Management tool. Managers can configure projects 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.

Steps to make Time Management ready to use

Before the employees can start filling in their 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

Add Clients

Provide the basic information about your clients.

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

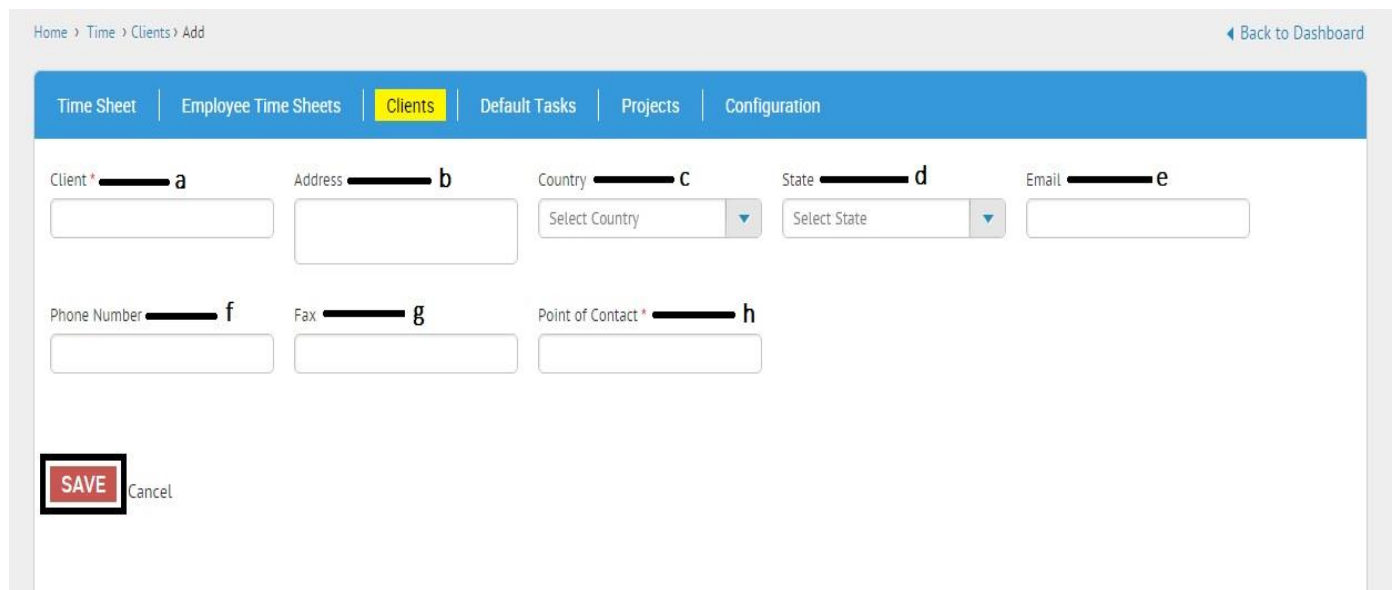


Figure 1

* - Denotes mandatory fields

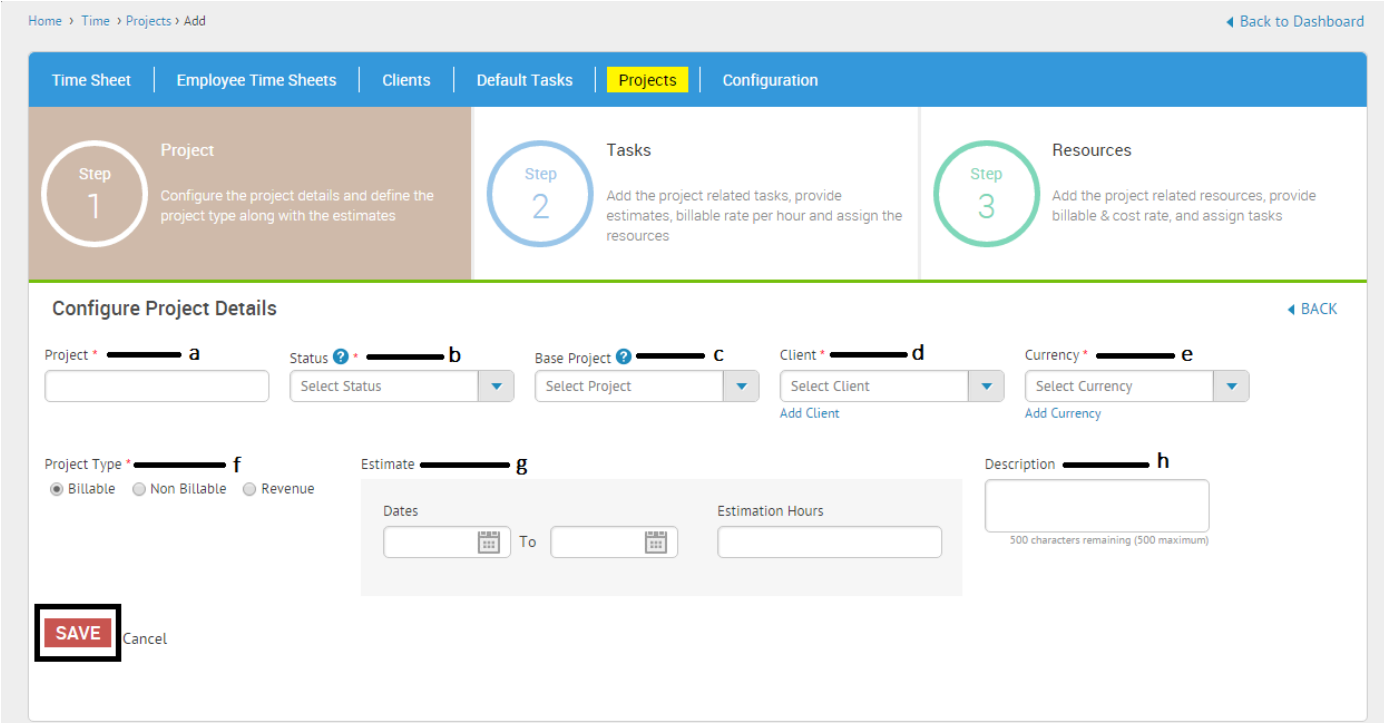
- a. Client name*
- b. Client location
- c. Name of the country the client is located in

- d. Name of the 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*

Add Projects

Under the **Projects** 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

500 characters remaining (500 maximum)

SAVE Cancel

Figure 2

* - Denotes mandatory fields

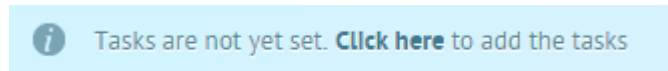
- a. Project Name*
- b. Status of the Project E.g. Initiated, In Progress, Completed etc.*
- c. The parent project name on which the current project is based on

- 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.

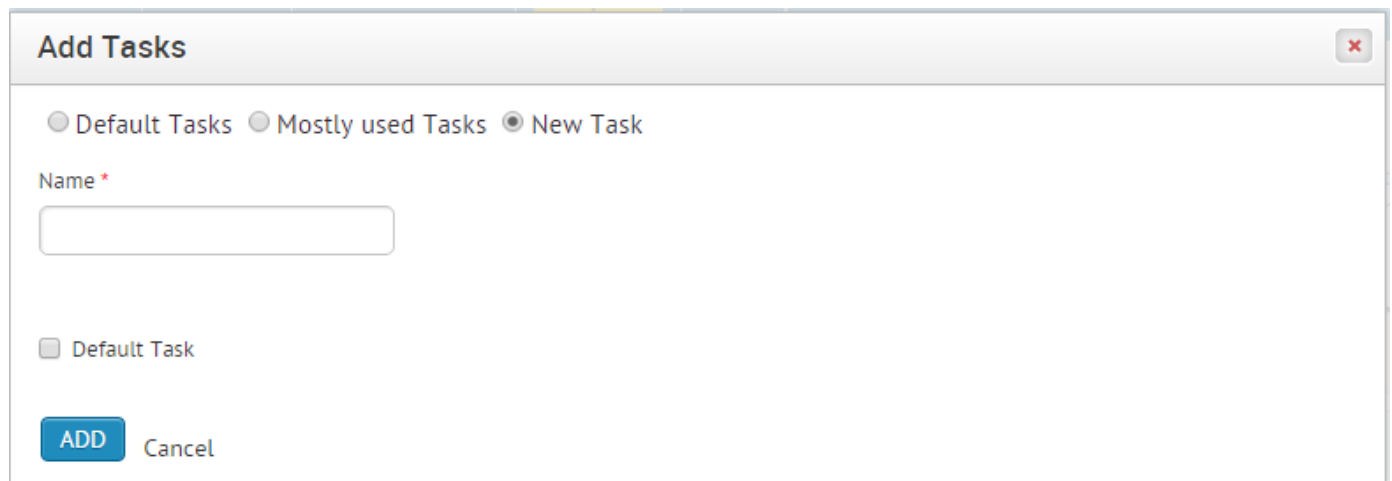
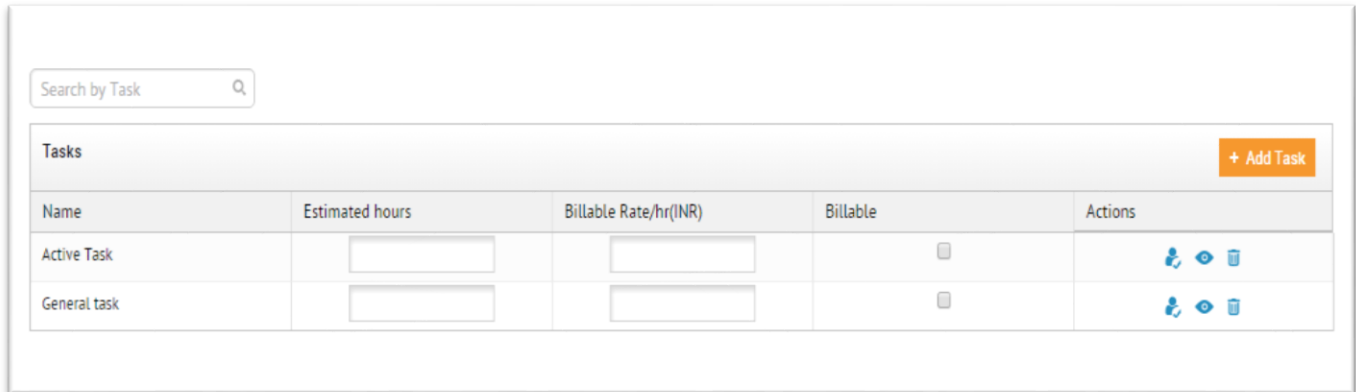
A screenshot of a web-based pop-up window titled "Add Tasks" in a grey header bar with a close button (X) on the right. The window has three radio buttons: "Default Tasks", "Mostly used Tasks", and "New Task", with "New Task" selected. Below the radio buttons is a text input field labeled "Name *" with a red asterisk. Underneath the input field is a checkbox labeled "Default Task". At the bottom left 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 (can be created here also)
- Mostly Used Tasks - The tasks frequently used in different projects will be populated here
- New Task – A new task can be added here (For a particular project only)

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

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



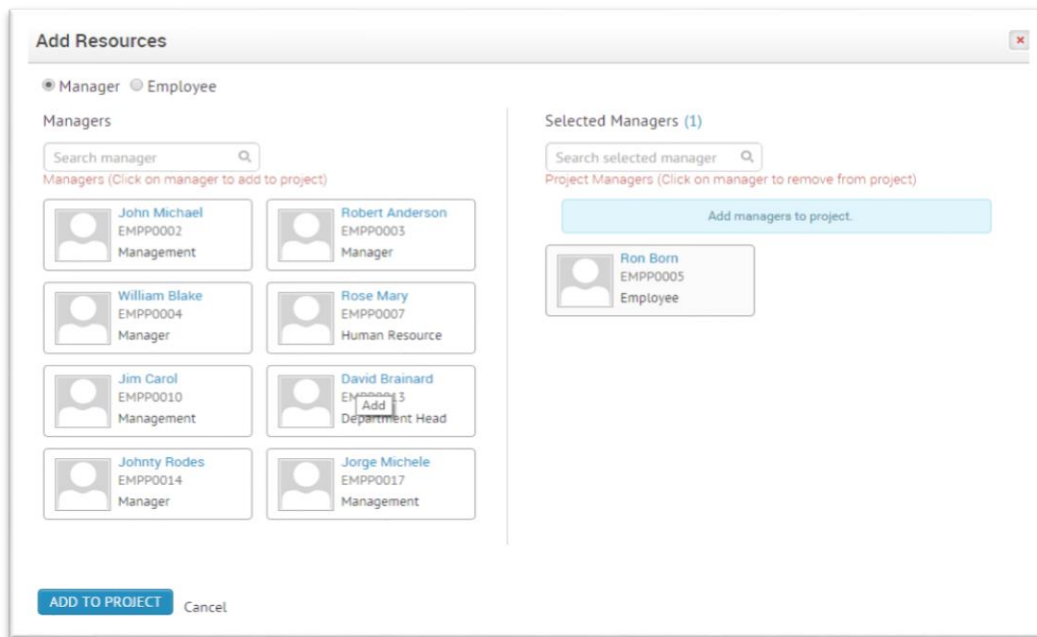
Tasks + Add Task				
Name	Estimated hours	Billable Rate/hr(INR)	Billable	Actions
Active Task	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	
General task	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

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.



Add Resources

Manager
Employee

Managers

Search manager

Managers (Click on manager to add to project)

John Michael
EMPP0002
Management

Robert Anderson
EMPP0003
Manager

William Blake
EMPP0004
Manager

Rose Mary
EMPP0007
Human Resource

Jim Carol
EMPP0010
Management

David Brainard
EMPP0013
Department Head

Johny Rodes
EMPP0014
Manager

Jorge Michele
EMPP0017
Management

Selected Managers (1)

Search selected manager

Project Managers (Click on manager to remove from project)

Add managers to project.

Ron Born
EMPP0005
Employee

ADD TO PROJECT
Cancel

Figure 2.3





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Click on the manager/employee radio button you wish to add to the project and then the name will appear on the right hand 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.

Role:


Resources			
Employee	Billable Rate/hr (INR)	Cost Rate/hr (INR)	Actions
 Robert Anderson <input checked="" type="radio"/> M	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> b   

a **+ Add Resource**

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.



Rose Mary
EMPP0007
Human Resource

☒ Unassigned
 ☐ Assigned
 ☐ All

Task	Estimated hours
<input type="checkbox"/> General task	
<input type="checkbox"/> Active Task	

a

b

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**

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.

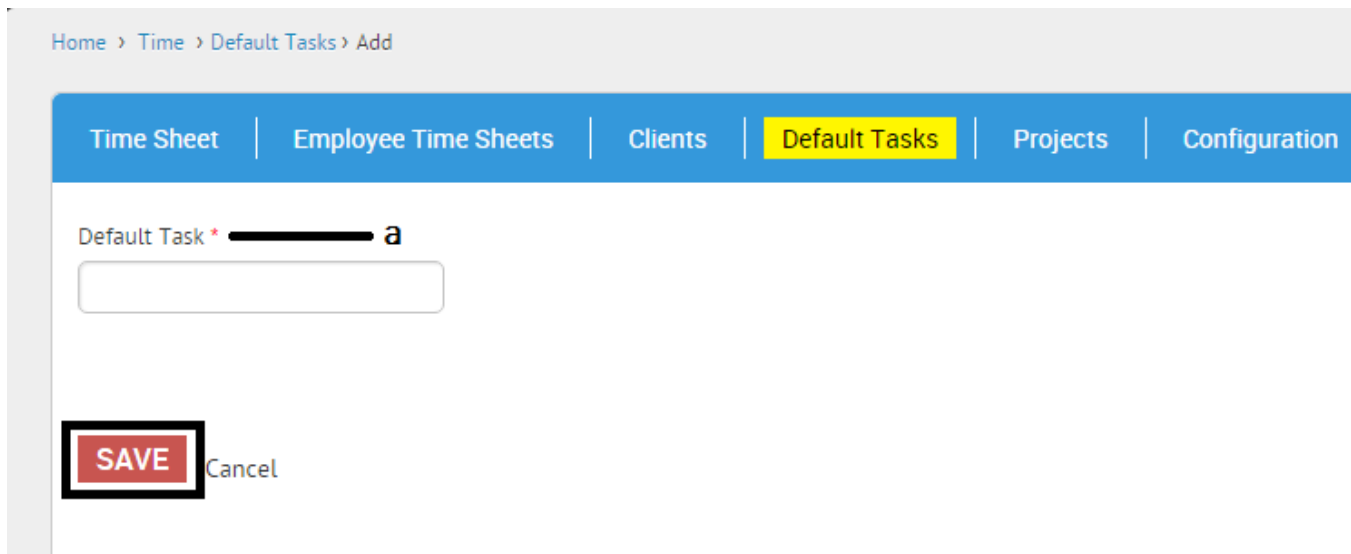


Figure 3

* - 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)

Configuration

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 the month. Sentrifugo 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.

Configuration	
Weekly Submission Reminder	Every Tuesday
Time sheet Blocking Range	1st - End of month

Figure 4

Weekly Submission Reminder *

Select Weekly Reminder D... ▼

Timesheet Blocking Range *

Select Block Dates Range ▼

SAVE Cancel

Figure 4.1

- Click on **Time** in the header menu.
- Select **Configuration** in the Time menu.
- Click on **EDIT** to perform the configuration
- 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 (Can be edited later)

Timesheet

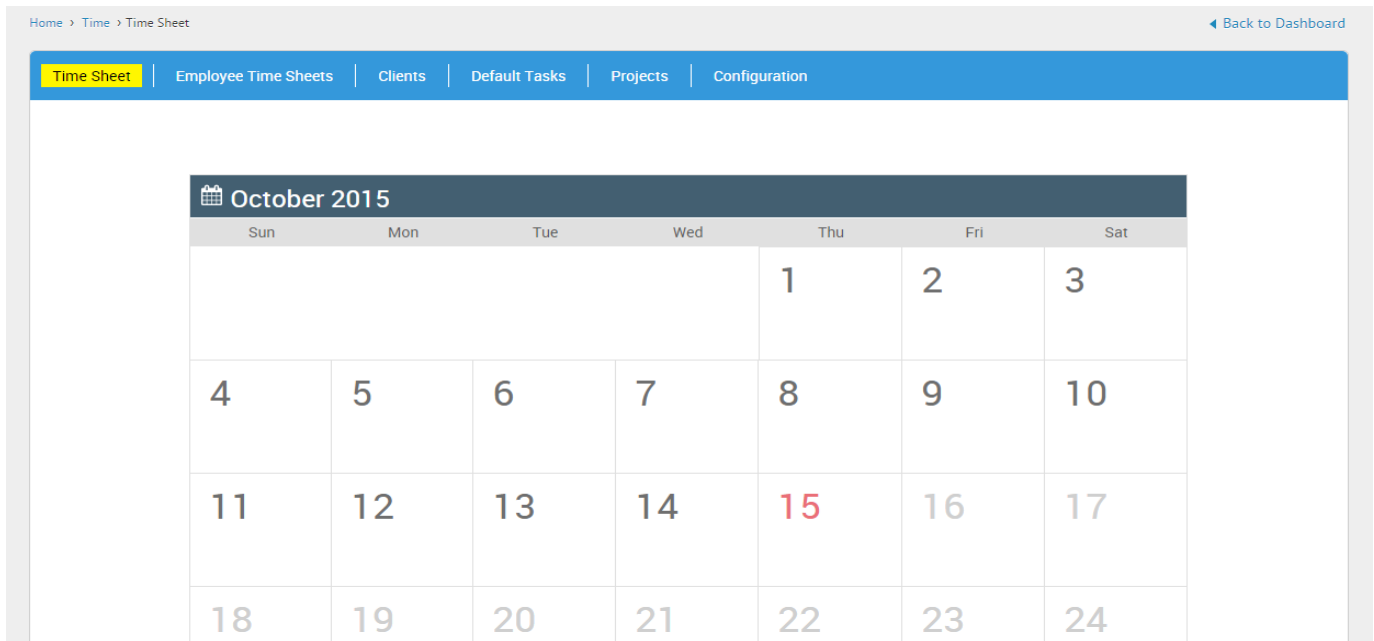
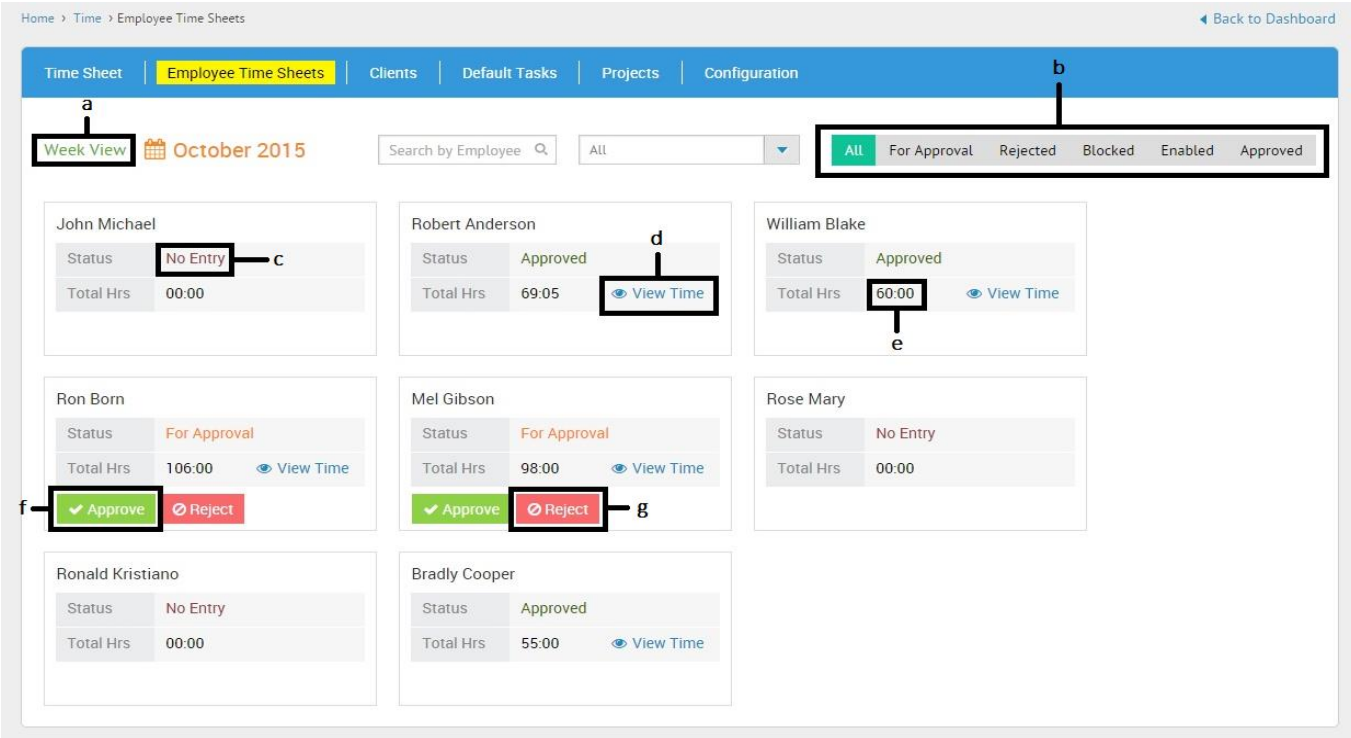


Figure 5

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

Employee Timesheets

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



The screenshot displays the 'Employee Time Sheets' page in the Sentrifugo HRMS. The interface includes a navigation bar with tabs for 'Time Sheet', 'Employee Time Sheets' (selected), 'Clients', 'Default Tasks', 'Projects', and 'Configuration'. A breadcrumb trail shows 'Home > Time > Employee Time Sheets'. A 'Back to Dashboard' link is in the top right.

Below the navigation bar, there's a section for 'Week View' (labeled 'a') showing the month of 'October 2015'. A search bar 'Search by Employee' and a dropdown menu 'All' are present. A filter bar (labeled 'b') shows tabs for 'All', 'For Approval', 'Rejected', 'Blocked', 'Enabled', and 'Approved'.

The main content area displays a grid of employee timesheets. Each employee's record shows their name, status, total hours, and a 'View Time' link. The status and total hours are labeled with letters c and e respectively. The 'View Time' link is labeled with letter d. At the bottom of the grid, there are 'Approve' (labeled f) and 'Reject' (labeled g) buttons for the selected employee.

Employee Name	Status	Total Hrs	Action
John Michael	No Entry	00:00	
Robert Anderson	Approved	69:05	View Time
William Blake	Approved	60:00	View Time
Ron Born	For Approval	106:00	View Time
Mel Gibson	For Approval	98:00	View Time
Rose Mary	No Entry	00:00	
Ronald Kristiano	No Entry	00:00	
Bradly Cooper	Approved	55:00	View Time

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.

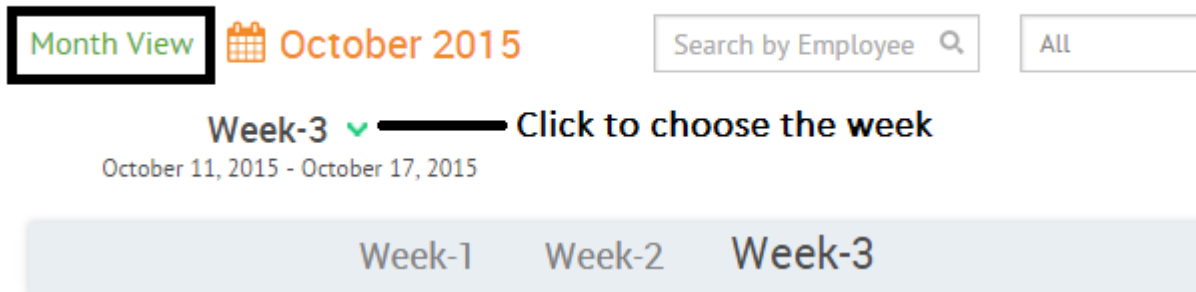


Figure 6.1

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

Manager

A manager has access to all the above listed options and can perform all the functions like the Super Admin, except for the **'Configuration'** function.

Managers have an extra feature of viewing the list of employees reporting to them, who haven't submitted their timesheets yet.

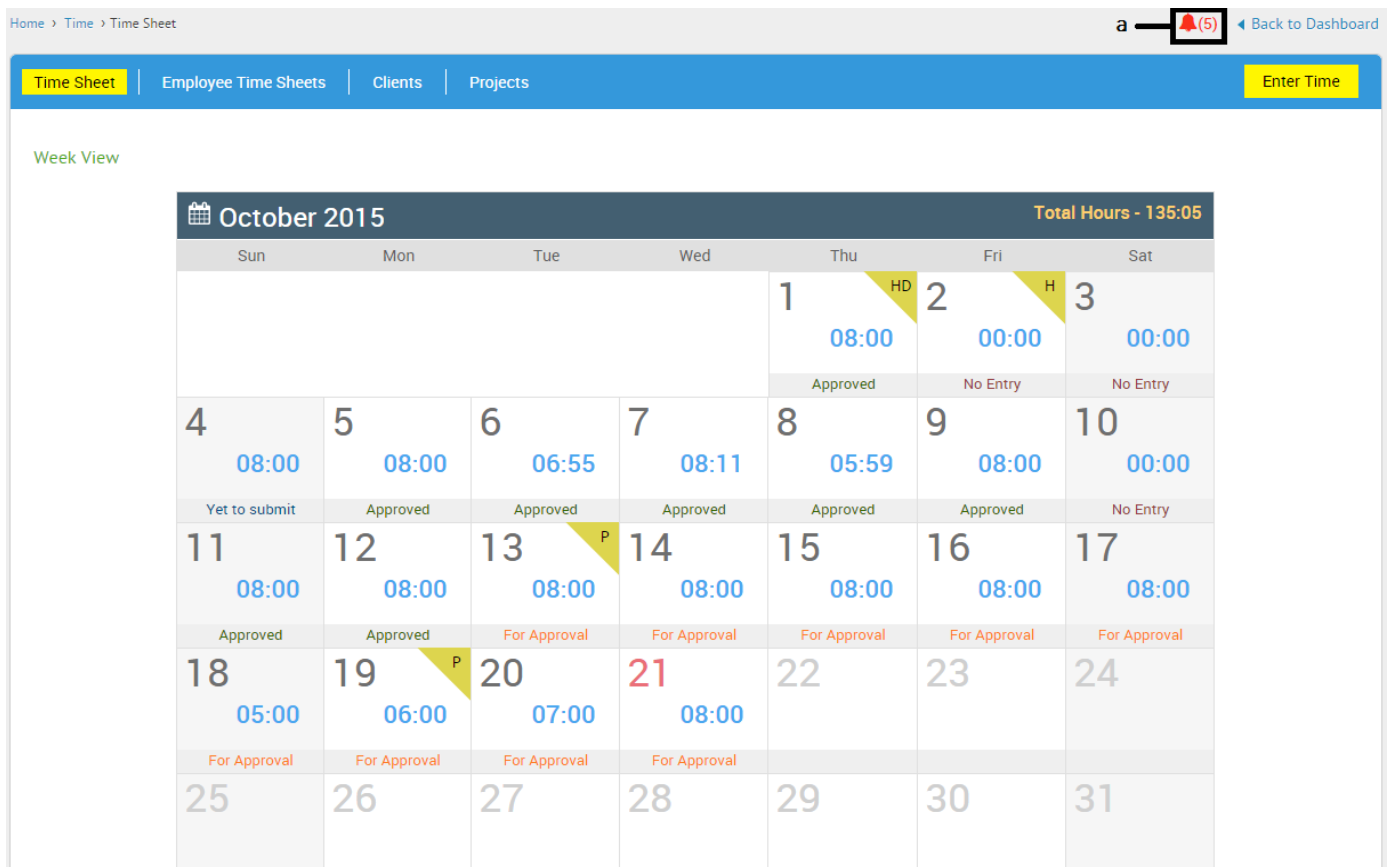


Figure 7

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:

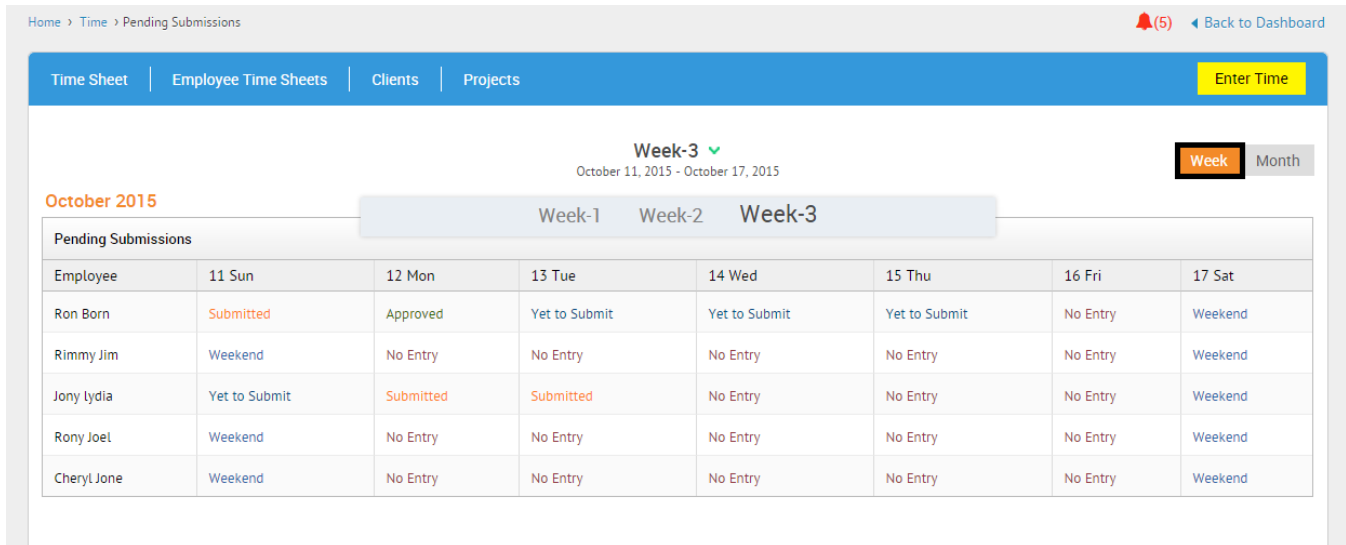


Figure 7.1

Monthly View for Pending Submissions:

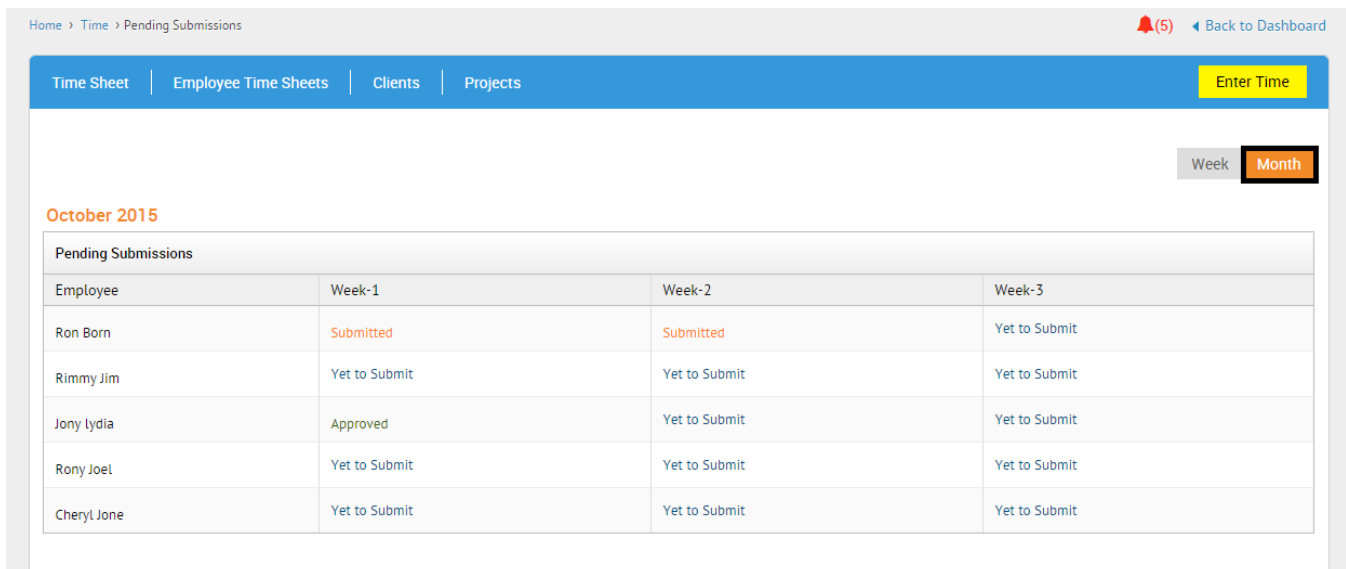


Figure 7.2

Employee

When an employee logs in to his Sentrifugo account and navigates to the Time module, this is how the screen will appear to him:

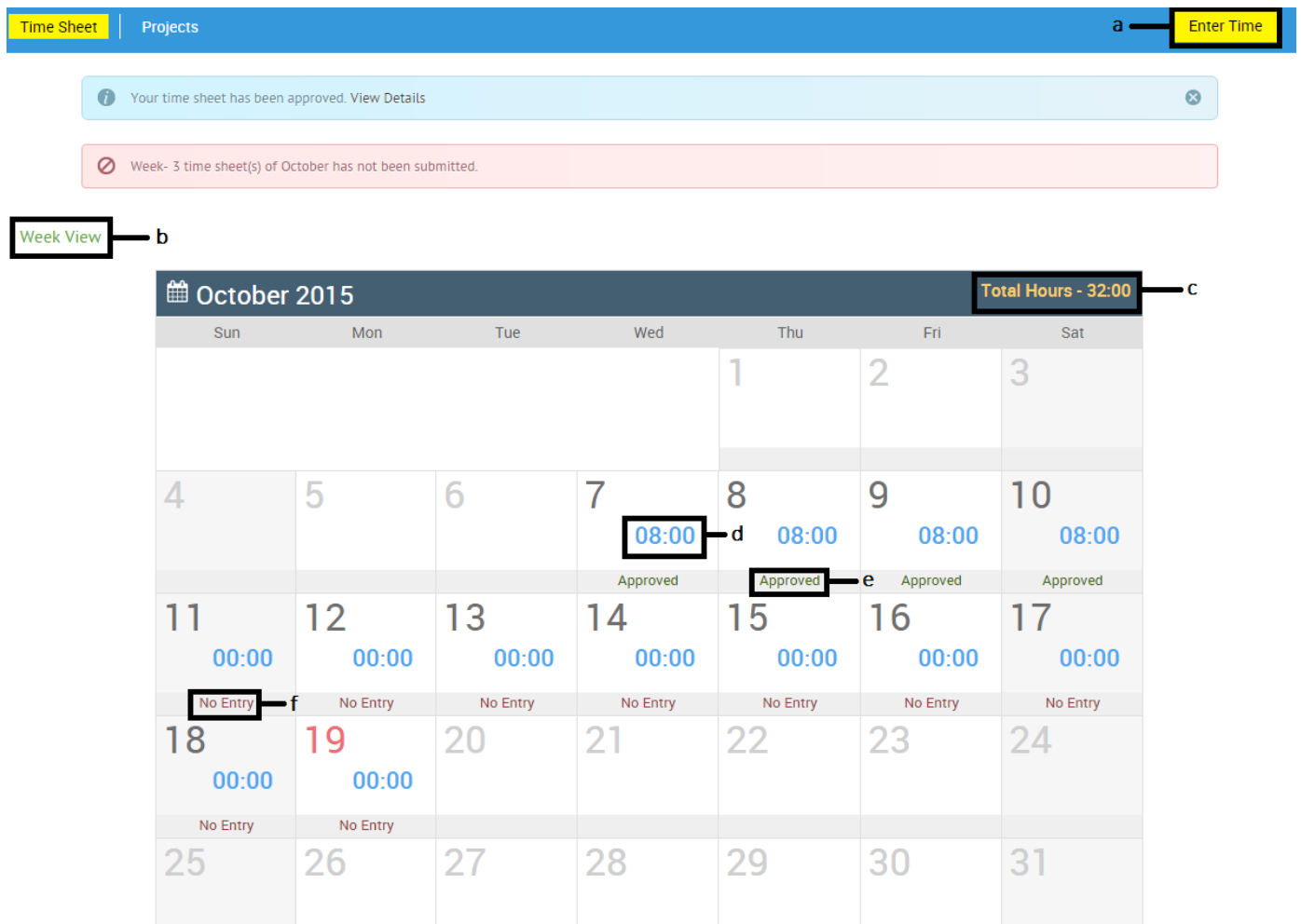




Figure 8

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

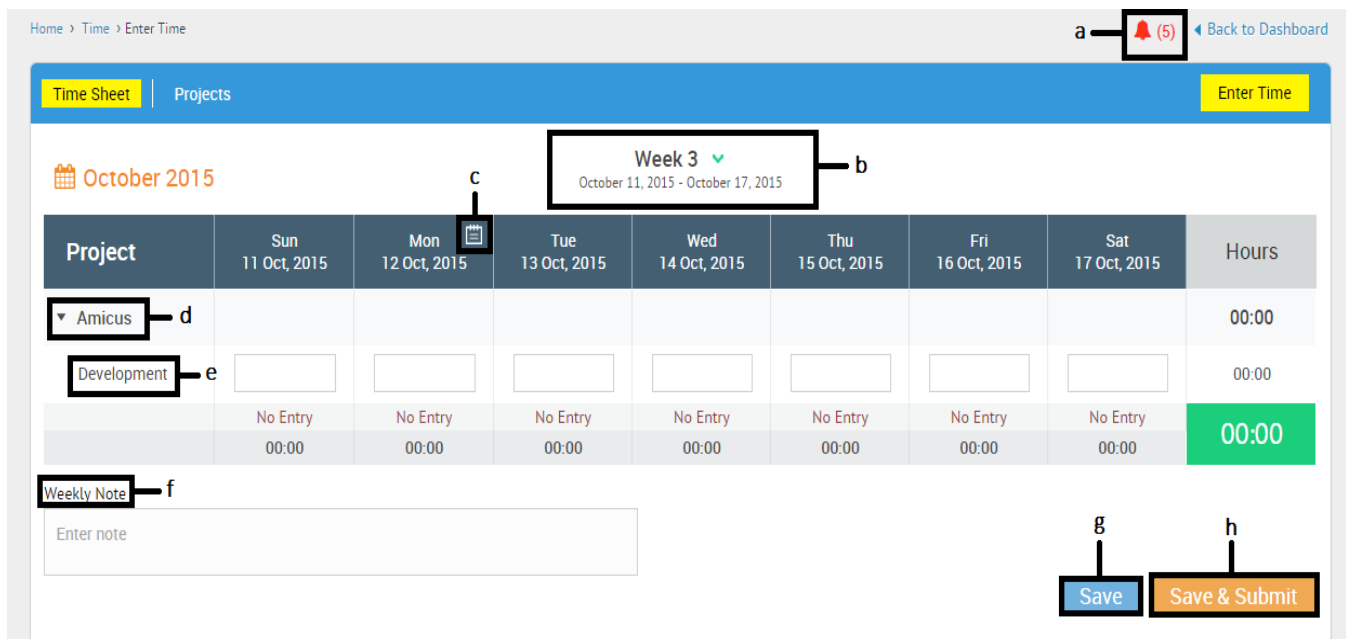
An employee will see the following message if his timesheet has been approved:

 Your time sheet has been approved. [View Details](#)


If the employee has not filled in his timesheet for a particular week, he will find the following message:

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

If an employee wants to enter the hours into his timesheet, he should click on [Enter Time](#) and the following window will open:





Home > Time > Enter Time



a  (5) [Back to Dashboard](#)

Time Sheet | **Projects** **Enter Time**

October 2015

Week 3  **b**
October 11, 2015 - October 17, 2015

c 

Project	Sun 11 Oct, 2015	Mon 12 Oct, 2015	Tue 13 Oct, 2015	Wed 14 Oct, 2015	Thu 15 Oct, 2015	Fri 16 Oct, 2015	Sat 17 Oct, 2015	Hours
d  Amicus								00:00
e  Development	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
	No Entry 00:00	No Entry 00:00	No Entry 00:00	No Entry 00:00	No Entry 00:00	No Entry 00:00	No Entry 00:00	00:00

f **Weekly Note**

Enter note

g **Save** **h** **Save & Submit**

Figure 8.1

- a. Reminders for filling in timesheets
- b. You can change to whichever
- c. Daily notes/comments (Employee can give details about the tasks and the number of hours for the day)
- d. Project name
- e. Task name
- f. Weekly notes/comments (Employee 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

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

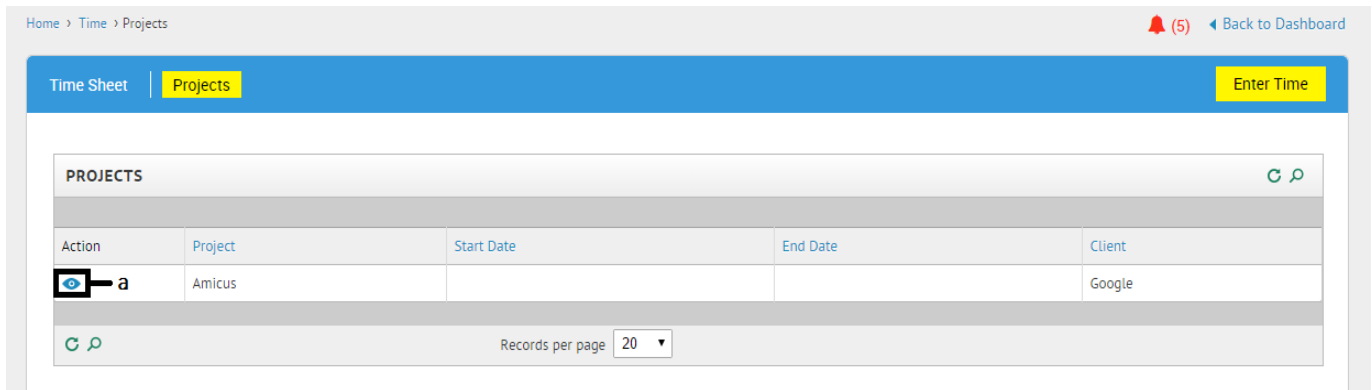


Figure 8.2

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

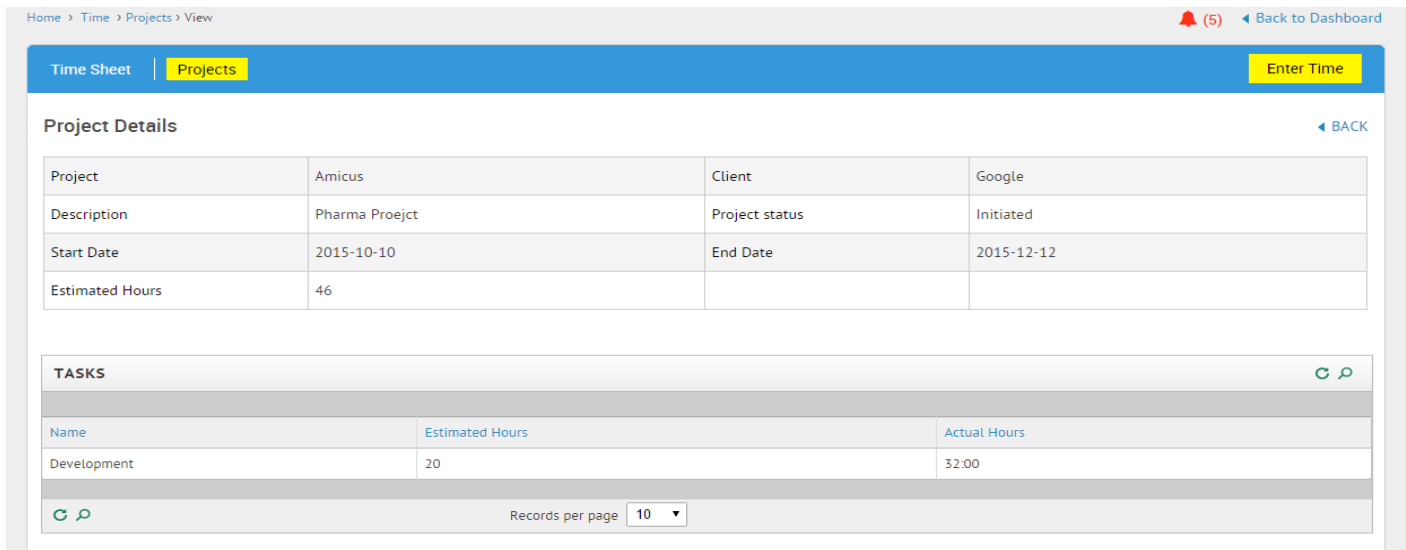


Figure 8.3

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