Time Recording

Time Recording is part of the Support Module

Contents

Introduction

This information assumes you have subscribed, or are planning to subscribe to our **Support Module**. You can subscribe by selecting this option in the Main Menu item Configuration and then License.

The Support Module in total consists of the following

- Support handling
- FAQ
- Punch cards
- Time recording
    - Time Sheets
    - Mileage
    - Expenses

In this guide you can read about Punch cards, Time Sheets, Mileage and Expenses.

Punch Cards allow you to simply allocate time to a project or a support case and then register time to it.

Time sheets allow time to be recorded for a project and any number of phases for that project. This also encompasses mileage and expense recording.

Punch Cards

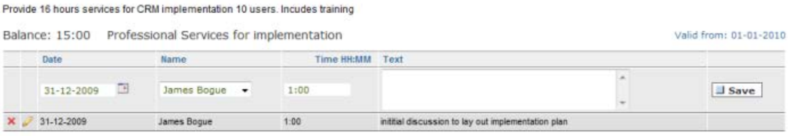
Punch Cards are very simple to use. Just go to the organisation or client record and you will see the following screen:

You may create any Number of punch cards. Just click the Punch Card Icon and then 'create new punch card' following screen will appear:

Simply enter the description of the job or project. Enter the time in HH:MM format, the price if applicable. You then have the option of making the card active and adding comments to help other users.

You may record time spent by each Punch Card. Just click the clock icon in the list of Punch Cards as below:

You will then see the following screen:



Any user who has access to the record can record time. It is also useful if the user enters some text into the time recording field as it helps reporting and evidence to customers.

You may create custom reports for Punch Cards in the Overview section of webCRM. Please refer to the on line help documentation for more information.

Timesheets and Delivery Phases

Time sheets differ to Punch Cards in the following ways:

- Selected Users can be assigned to a project or phases of a project
- Pre-Invoiced, Billable and Overtime Time can be recorded
- Mileage, Time Travelling and Expenses can be recorded
- Summary information by project or phase can be viewed
- The user have a common screen where time can be recorded for all projects

To enable the use of timesheets for a project you must first of all create a delivery. Deliveries are automatically created when a sales opportunity is won. You may of course create a delivery from new. Please refer to the on line help documentation for more information.

The step to allow the use of timesheets, mileage and expenses requires:

- A Delivery or Delivery Phases (optional)

Delivery Phases + Time recording

Comment	Enabled
Work hours	Enabled
Billable time	Enabled
Overtime	Enabled
Travel time	Enabled
Punch cards	Enabled
Phases	One per Delivery
Assign users	Default all assigned
Planning data	Yes
Delivery Phase status	Enabled
Delivery Phase responsible	Enabled
Revenue	Enabled
Record Expenses	Enabled
Record Mileage	Enabled
Record Add-on	Enabled

From the configuration menu you can select to have always just one phase per delivery and you can also select to have all users assigned to projects per default. If you select these options you can create deliveries and start recording time without further requirements.

From the configuration menu < Main Settings < Data fields you can also select the detail level for phases such as planning data. You can also select what you want to record time against (Work hours, Billable time, Overtime, Travel time)

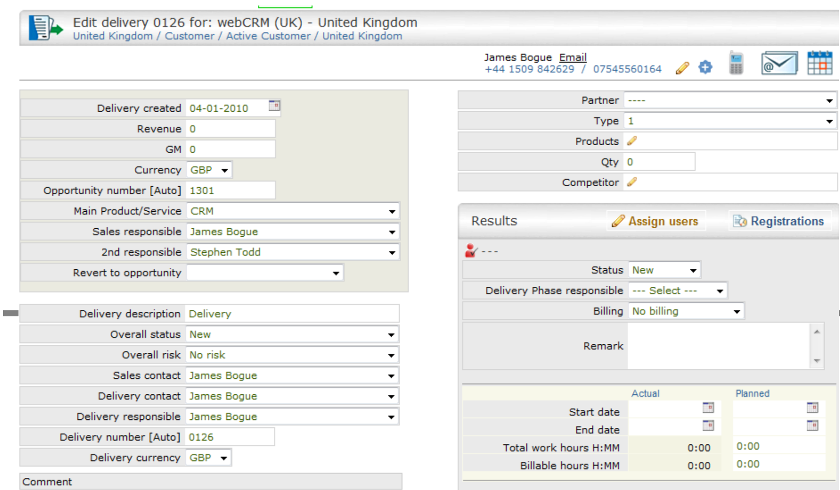
Deliveries:

From a time recording perspective there are 2 types of deliveries:

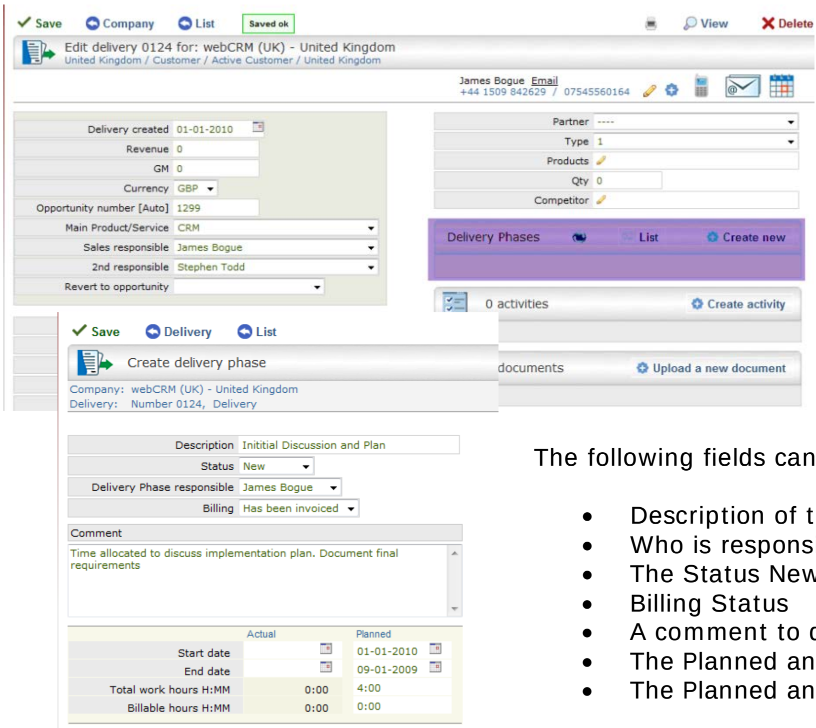
1) Project type deliveries for at specific customer/client.
2) General projects such as Education, Absence, Meetings, Etc.

To create deliveries for general time recording, first create your own company as an Organisation/Client in webCRM. The create deliveries for this organisation an select the field "Overall status" = "General project"

The Delivery Screen (when one phase only is selected form the configuration menu)



The Delivery Screen (when more phases are selected from the configuration menu):



In a new delivery you will see the highlighted area 'Delivery Phases'

To create a Phase just click Create New. You will then see the following screen:

The following fields can be updated:

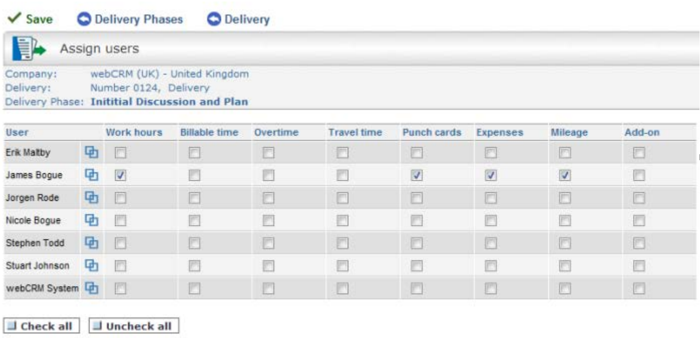
- Description of the Phase
- Who is responsible for the Phase
- The Status New On-Going or Complete
- Billing Status
- A comment to describe the Phase in more detail
- The Planned and Actual Phase start and end
- The Planned and Actual hours to work and be billed

Once you have created the Phase you can then save and if required create additional Phases like the example below:

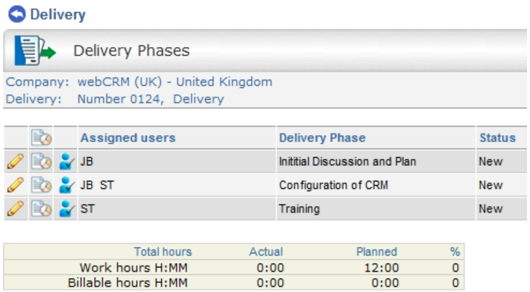
You will notice the red figure, this means that no users have been assigned to the phase and therefore cannot record time.

Assigning Users

In order to enable users to record time you must assign users. Within a delivery phase you will see the red figure. By clicking on the red figure you will be able to allocate users of webCRM to record time, expenses and mileage. The following screen is an example of what you will see:



You can allocate multiple users and also decide what they can record from the options. i.e. If you have a fixed price contract you will only want to record 'Work Hours' but if you need to invoice time you can select Billable Time or a combination as required. This will have the effect of offering the user different options when they want to record against a phase. Additionally you can allocate different options to different users depending on their role in the Phase.



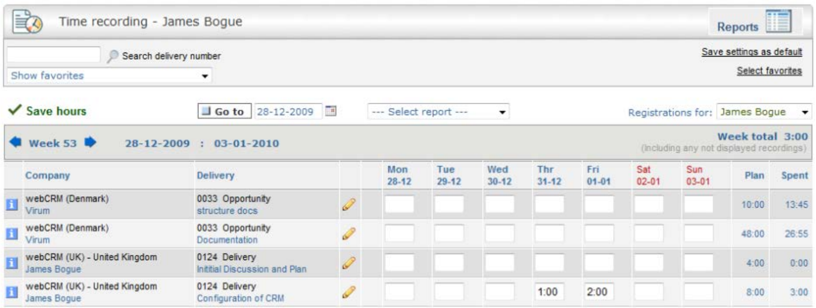
Once you have assigned users to each of the phases when you return to the list of Phases you will see that the allocated users figure has turned to blue.

Now you are ready to record information against the Phases.

Registering Time

You record information by clicking on the Time Recording icon from the Main Menu as highlighted below:

You will then see the following screen:



You will see a list of Phases which have been allocated to the logged in user.

You can filter this list in a number of different ways. You may see all the Phases or indeed as in the example select favourites. You can allocate a favourite by clicking 'Select Favourites' in the top right hand side of the screen. You can then simply select your favourite Phases. You can also select which week you want to record information against by completing the date field and clicking the Go to icon. You can also save these settings as default.

If you have enabled "Punch card" recording for the project you will also see a time icon in the above screen. Click this icon to record Punch card time.

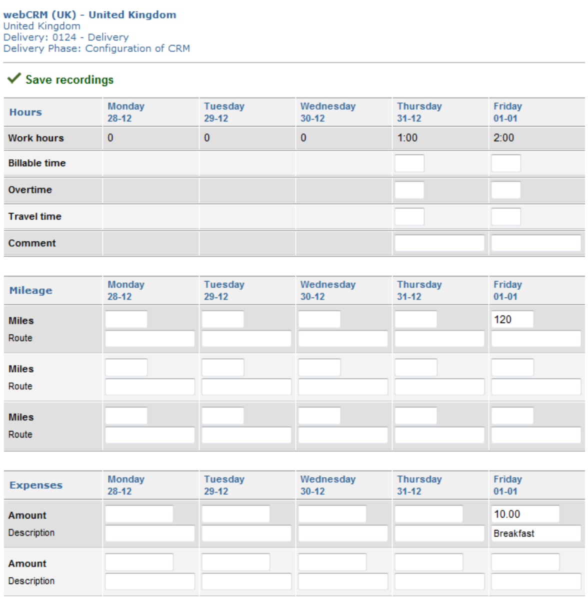
To record work hours just fill in the time, in the format HH:MM or in the format H,hh in each of the boxes against the appropriate Phase. (2:30 = 2.5)

The time entered above is always "Work hours". By clicking the edit icon you then can register other hour types (billable, overtime, travel) and also 'Expenses' and 'Mileage'

By clicking the Info icon you will se details for the project including planned and actual data (when enabled). See the Phase Registration section for more details

Registering Expenses and Mileage Other Hour types

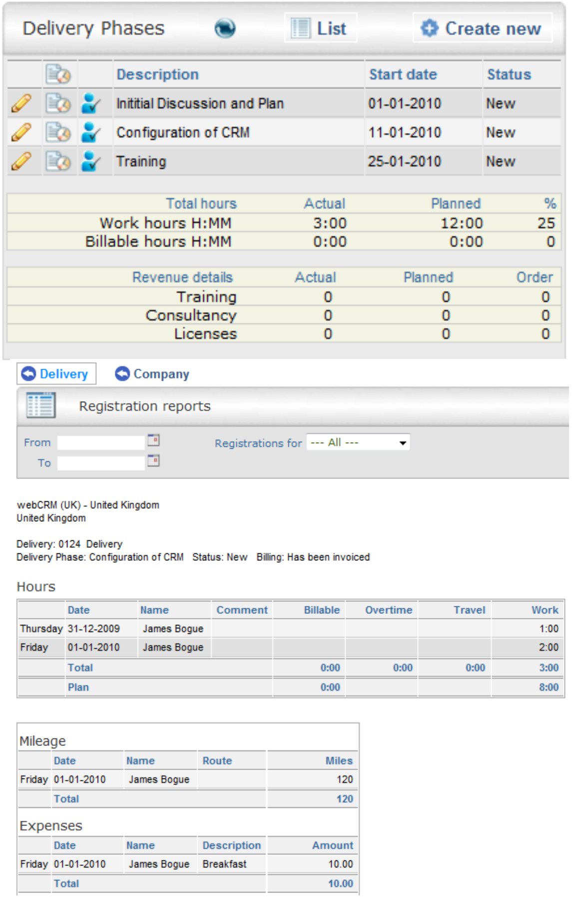
As we have seen by clicking the  edit icon, within the time recording module you then can register 'Expenses and Mileage' for the Phase, as you will see below:



Remember you need to choose the correct options when 'Assigning Users' to record mileage and expenses.

Phase Registration Information

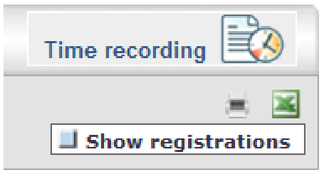
For all time recorded for Phases webCRM add these together and provides a summary of all the time spent for the delivery, as shown in the example below:



In this example you can see that 3 hours have been recorded from the 12 hours allocated to all the phases.

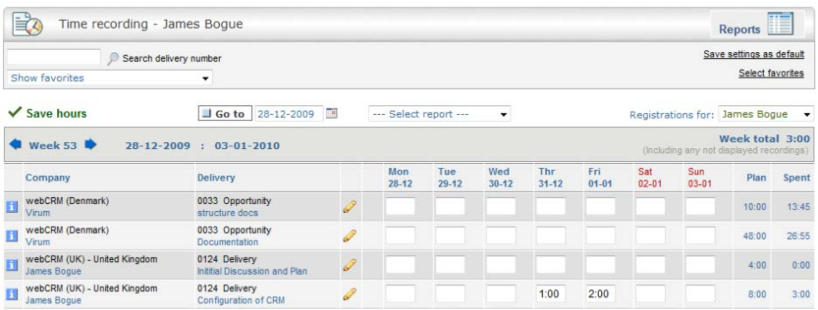
By clicking on the time icon you can also see how much time has been recorded by each phase. This is called a registration report and allows you to filter registrations by user and / or time period. An example is shown below:

You also have the option to download the registration information into excel or print the information:

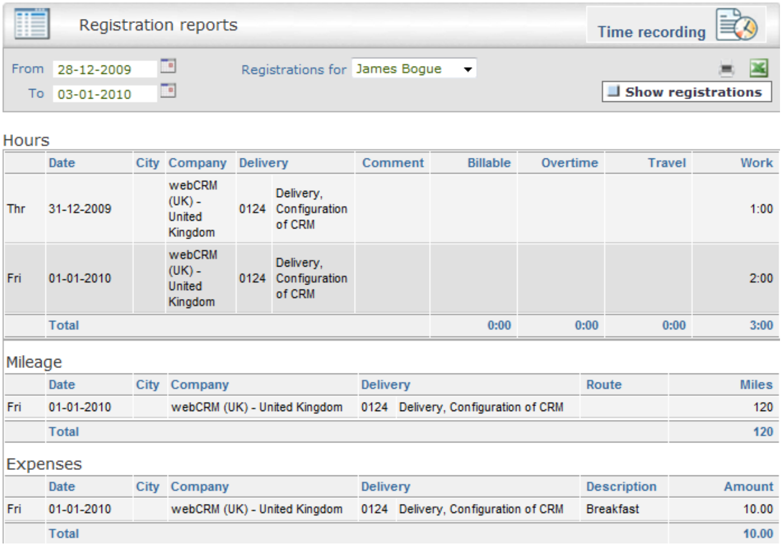


To view detailed registrations by any webCRM user click on the Time Recording icon from the Main Menu as highlighted below:

You will then see the following screen. By selecting the Reports Icon and clicking you will then see the reporting screen.



By selecting Reports in the top right corner you will see the following screen:



Hours

	Date	City	Company	Delivery		Comment	Billable	Overtime	Travel	Work
Thr	31-12-2009		webCRM (UK) - United Kingdom	0124	Delivery, Configuration of CRM					1:00
Fri	01-01-2010		webCRM (UK) - United Kingdom	0124	Delivery, Configuration of CRM					2:00
	Total						0:00	0:00	0:00	3:00

Mileage

	Date	City	Company	Delivery		Route	Miles
Fri	01-01-2010		webCRM (UK) - United Kingdom	0124	Delivery, Configuration of CRM		120
	Total						120

Expenses

	Date	City	Company	Delivery		Description	Amount
Fri	01-01-2010		webCRM (UK) - United Kingdom	0124	Delivery, Configuration of CRM	Breakfast	10.00
	Total						10.00

You may then filter the reports by User and Time Period.

You will also see that you can download the information to excel or indeed print it.

Custom Overviews (Reports)

webCRM provides the facility for you to create custom reports for the following Time Recording options:

- Delivery Phases
- Time Recording
- Expense Recording
- Mileage Recording
- Punch Cards
- Punch Card recordings

Please refer to the on line help documentation for more information about creating Overviews.