

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.

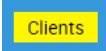

Steps to make Time Management ready to use

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

- Add Clients
- Add Projects
- Add Default Tasks

Add Clients

Provide the basic information about your clients.

Select the option  from the Time module's menu. Click on the  button.

- 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*

* - Denotes mandatory fields

Refer Figure 1

Home > Time > Clients > Add Back to Dashboard

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

Client * **a** Address **b** Country **c** State **d** Email **e**

Phone Number **f** Fax **g** Point of Contact * **h**

SAVE Cancel

Figure 1

Add Projects

Under the **Projects** section there are 3 steps:

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

- 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. Project Description

* - Denotes mandatory fields

Refer Figure 1

Home > Time > Projects > Add Back to Dashboard

Time Sheet

Employee Time Sheets

Clients

Default Tasks

Projects

Step 1

Project

Configure the project details

Step 2

Tasks

Add the project related tasks and assign the resources

Step 3

Resources

Add the project related resources and assign tasks

Configure Project Details

Back

Project * **a**

Status ? * **b**

Base Project ? **c**

Client * **d**

Description **e**

Select Status

Select Project

Select Client

SAVE

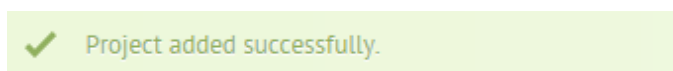
Cancel

Add Client

500 characters remaining (500 maximum)

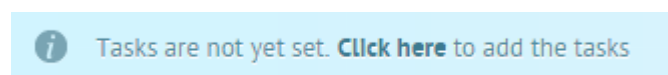
Figure 2

SAVE the details to move onto the next step. Once the project details have been saved you will see the below message on the next screen.



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.

Add Tasks

☐ Default Tasks
 ☐ Mostly used Tasks
 ☒ New Task

Name *


☐ Default Task

Figure 2.1

- Default Tasks - The default tasks that had been set up in the 'Default Tasks' tab (can create here)
- Mostly 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.

a. Select the option **+ Add Task** to add more tasks

b. Click on  to assign resources to tasks

Home > Time > Projects > Edit

◀ Back to Dashboard
 Help

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

Step 1

Project

Configure the project details

Step 2

Tasks

Add the project related tasks and assign the resources

Step 3

Resources

Add the project related resources and assign tasks

Client : App Client Project Name : B

◀ BACK

Search by Task

Tasks

+ Add Task

Name	Actions
General Task	<div>b</div> <div> </div>
Andriod Development	<div> </div>

Figure 2.2

Click on the resources to select them and the name will move to the right column. After selecting the resources click on **+ ASSIGN RESOURCES** .


Assign Resources To Task

Task: Active task


Resources

Resources (Click on resource to add to task)

M



Ron Born
EMPP0005
Employee



Mel Gibson
EMPP0006
Employee

Selected Resources

Task Resources (Click on resource to remove from task)

Resources are not available.

No resource added to task.

+ ASSIGN RESOURCES

Cancel

Figure 2.2.1

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.

Select the manager/employee radio button. Then click on the names you want to add to the project and they will appear on the right side column as selected managers/employees. Click on **ADD TO PROJECT**

ADD TO PROJECT Cancel

Figure 2.3

- Add more resources
- Assign tasks to resources and on clicking this option a pop up (Figure 2.4.1) window will open

Role

All

Search by Employee

Resources

+ Add Resource


Employee	Actions
<div><div></div><div>John Michael</div><div>M</div></div>	<div>b</div> <div><div></div><div></div><div></div></div>
<div><div></div><div>William Blake</div><div>M</div></div>	<div><div></div><div></div><div></div></div>
<div><div></div><div>Rose Mary</div><div>M</div></div>	<div><div></div><div></div><div></div></div>

Figure 2.4

- 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**

SAVE all the added details.

Add Task To Resource ✕



John Michael
EMPP0002
Management

☒ Unassigned ☐ Assigned ☐ All **a**

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

ASSIGN TASK **b**

Cancel

Figure 2.4.1

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.

* - 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)

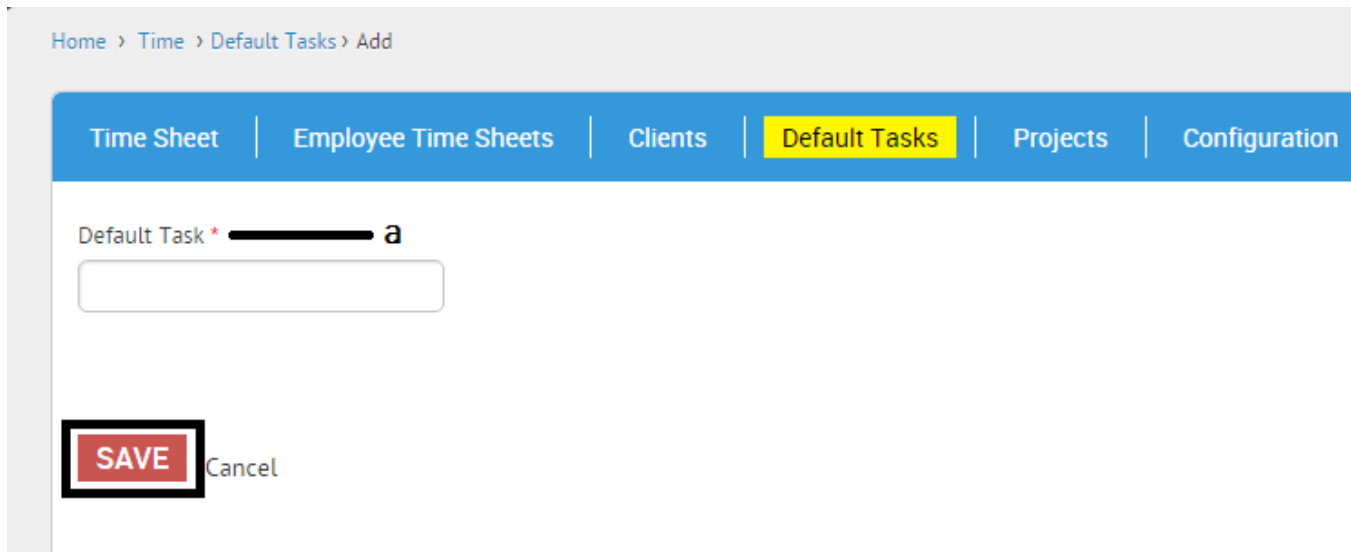


Figure 3

Timesheet

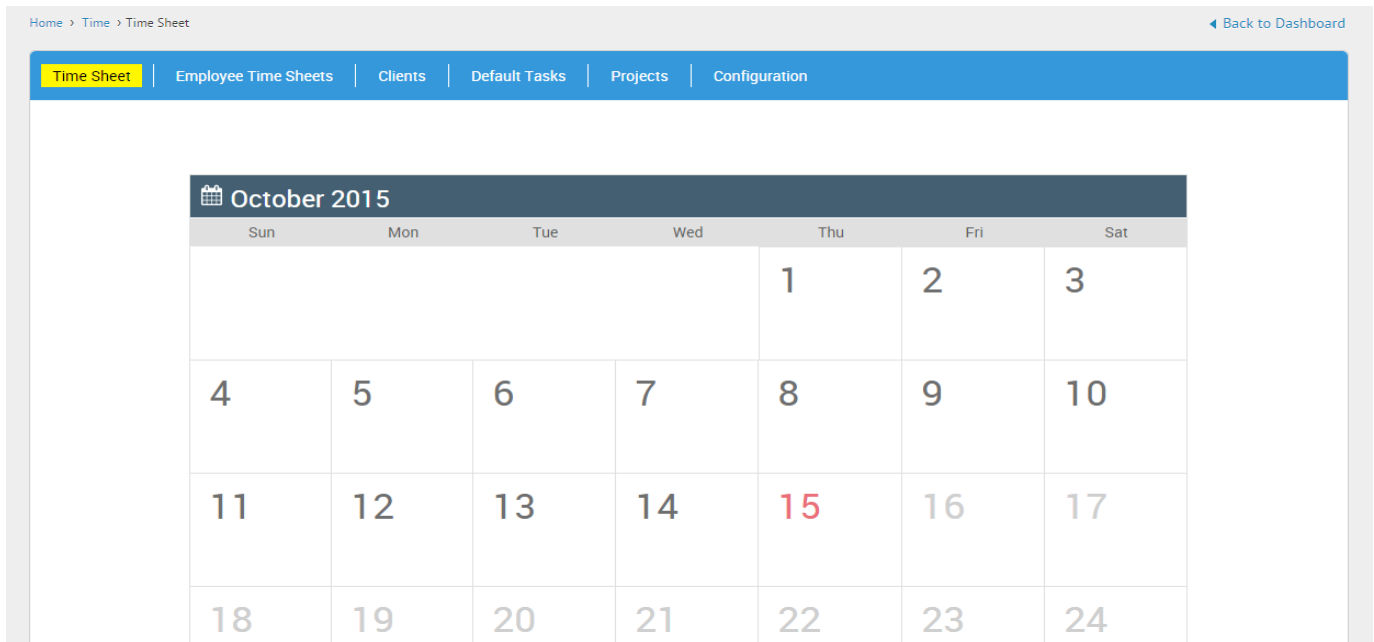


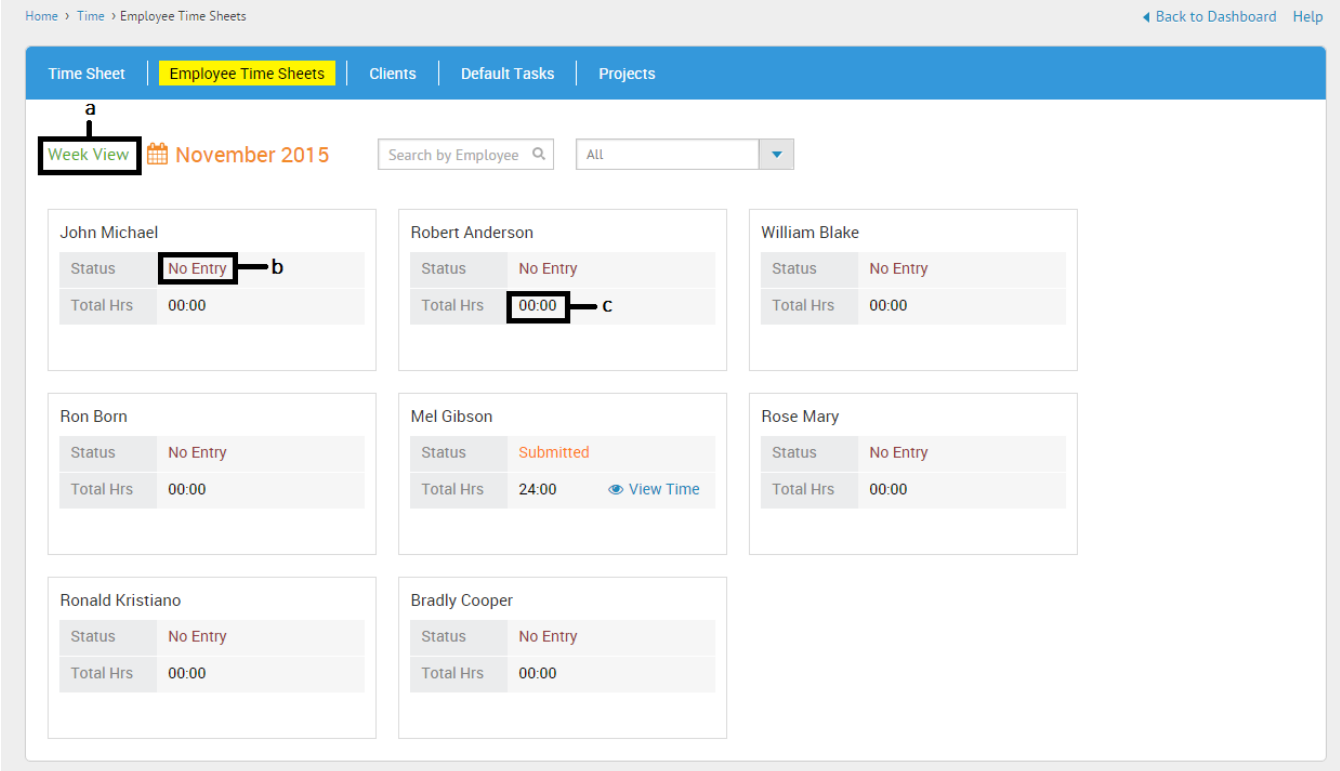
Figure 4

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.

- a. The view type (Weekly/Monthly). Click on the word Weekly View to change it to Monthly View mode.
- b. Timesheet status (No Entry, Submitted)
- c. Total no. of hours worked



Home > Time > Employee Time Sheets ◀ Back to Dashboard Help

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

a
Week View 📅 November 2015

Employee Name	Status	Total Hrs	Actions
John Michael	No Entry b	00:00	
Robert Anderson	No Entry	00:00 c	
William Blake	No Entry	00:00	
Ron Born	No Entry	00:00	
Mel Gibson	Submitted	24:00	View Time
Rose Mary	No Entry	00:00	
Ronald Kristiano	No Entry	00:00	
Bradly Cooper	No Entry	00:00	

Figure 5

The Figure 5.1 shows the Weekly view options, in which the Timesheets of the employees can be viewed for each week of the month.

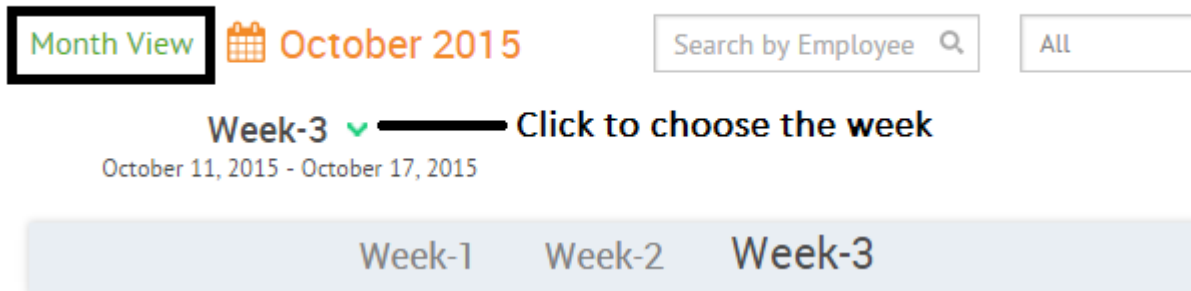


Figure 5.1

After completing all the above mentioned 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.

Employee

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

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

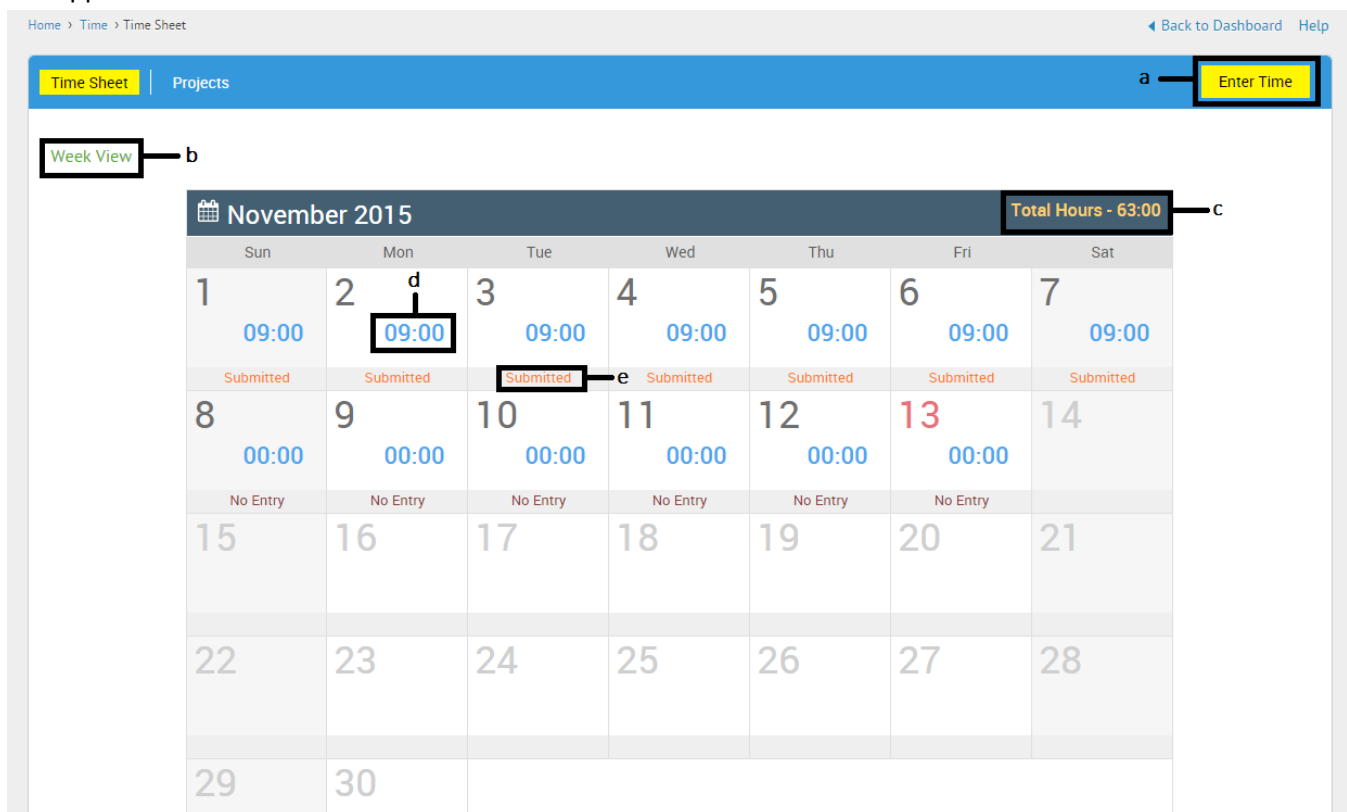
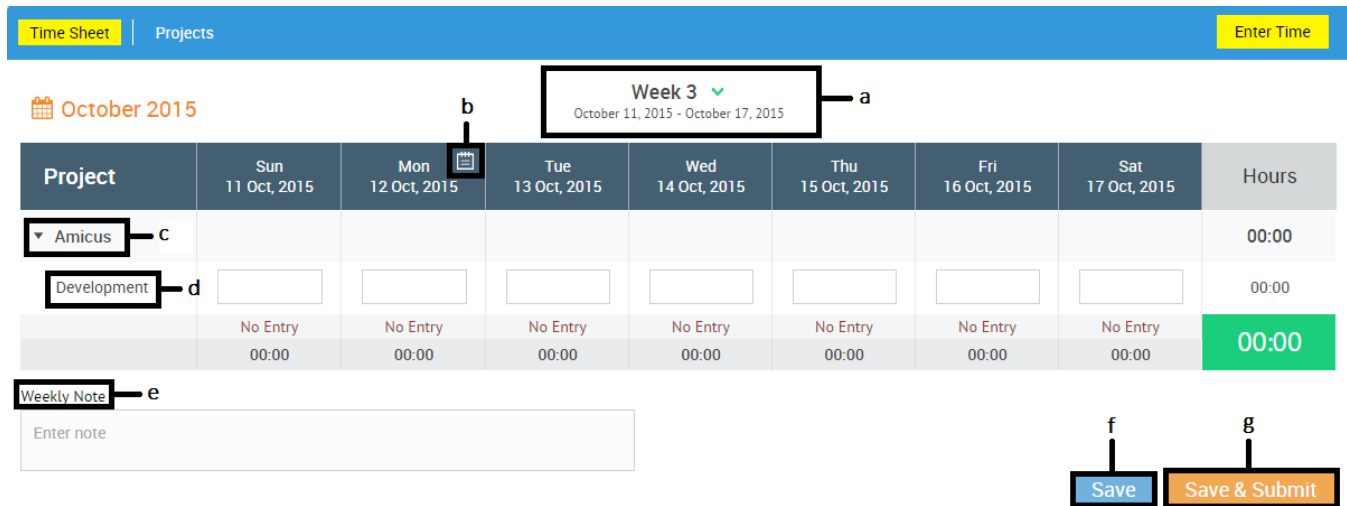


Figure 6

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

- You can change the week

- b. Daily notes/comments (Employee can give details about the tasks and the number of hours for the day)
- c. Project name
- d. Task name
- e. Weekly notes/comments (Employee can give details about the tasks and the number of hours for the week)
- f. Saves the timesheet (can be modified even after saving)
- g. Saves & submits the timesheet for approval



Time Sheet | Projects Enter Time

October 2015 Week 3 ✓
October 11, 2015 - October 17, 2015

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
Amicus								00:00
Development								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

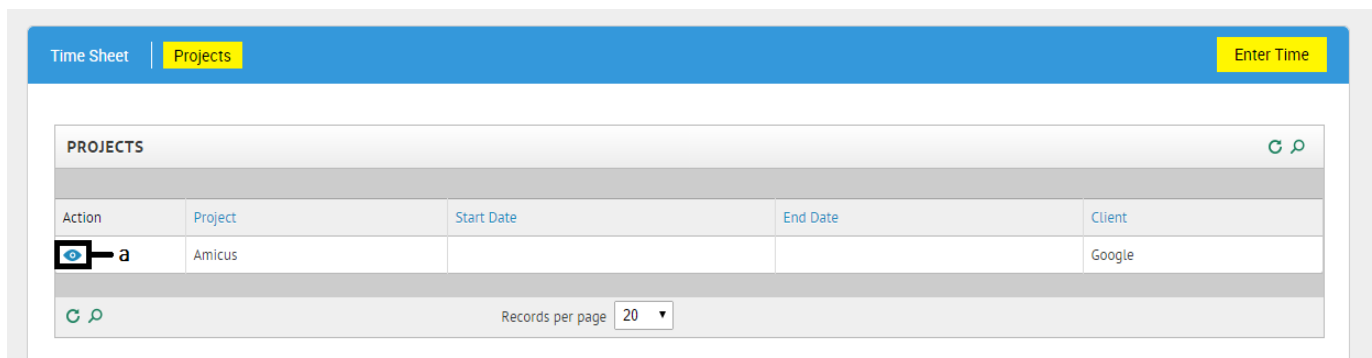
Weekly Note
Enter note

Save Save & Submit

Figure 6.1


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

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



Time Sheet | **Projects** Enter Time

PROJECTS

Action	Project	Start Date	End Date	Client
 a	Amicus			Google

Records per page 20

Figure 6.2

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

[Home](#) > [Time](#) > [Projects](#) > [View](#)

[Back to Dashboard](#)
[Help](#)

Time Sheet | **Projects** Enter Time

Project Details ◀ BACK

Project	Helios	Client	Google
Description		Project status	Initiated

TASKS 🔄 🔍

Name	Actual Hours
Active task	07:00
General task	56:00

🔄 🔍
Records per page 10 ▼

Figure 6.3