

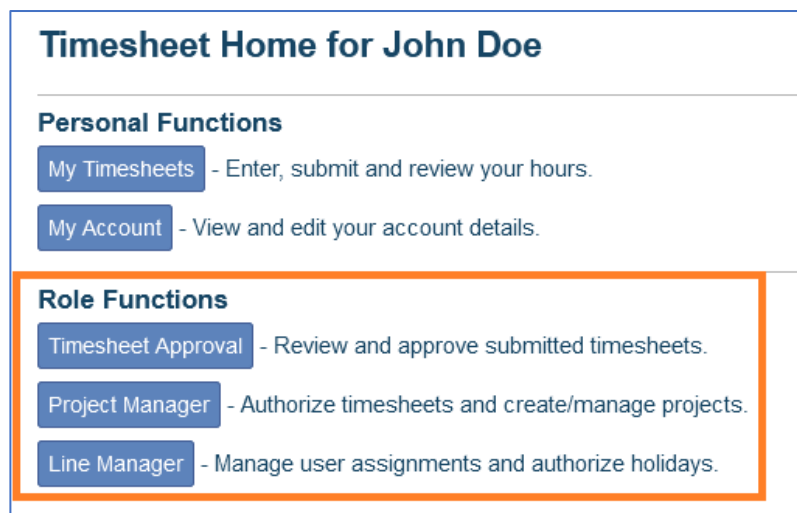
Segula UK Timesheet

Project / Line Manager Guide

This guide is specifically for Project Manager / Line Manager functions.
For basic system functions, such as entering and submitting Timesheets, please refer to “Segula UK Timesheet - User Guide”

Role Functions

As a project- or line manager, you have additional role functions available, that appear on your Timesheet start page.



- “Timesheet Approval”: Review and approve/reject submitted Timesheets. See users with pending Timesheets and users with late Timesheets.
- “Project Manager”: Create and manage projects, view project reports. Create project member assignment requests.
- “Line Manager”: View and manage user assignment requests.

Timesheet Approval

Whether you are a project manager, a line manager or both, you can use this function to review, approve and reject submitted Timesheets.

Timesheet Approval Home

Timesheet Approval Home

Users With Pending Timesheets

List of users with timesheets waiting for approval.

User	Oldest Pending
Royal Maxwell	Oct. 30, 2023

Late Users

Users managed by you, who have not submitted any timesheets for the previous week.

User	Latest Submission
New Guy	No Timesheets submitted yet

User Search

There are three main functions in the Timesheet approval home view.

Users with Pending Timesheets:

A list of users who have submitted Timesheets, which have not been approved or rejected yet, sorted by oldest pending Timesheet.

Clicking on the name of the user or the date for their oldest pending Timesheet, will open up an overview for the user that lists their Timesheets, which you are authorized to view/approve.

Timesheet Overview for Royal Maxwell		
30/10/2023 		
Week	Date	Status
40	Oct. 2, 2023	Approved
41	Oct. 9, 2023	Approved
42	Oct. 16, 2023	Approved
43	Oct. 23, 2023	
44	Oct. 30, 2023	Submitted
45	Nov. 6, 2023	
46	Nov. 13, 2023	

Late Users

A list of users who have not submitted Timesheets for any projects in the previous week.
This will show only users you are authorized for.

Note: Only users who have submitted Timesheets for -any- project at all, will not show up here, even if it is for a project that you are not authorized to view/manage.

User Search

If you want to see a Timesheet overview for a user who does not have pending or late Timesheets, you can use the user search function.

Start typing the name of a user and a list of suggested results will come up.

You can either select a name from the list and click on the “Search” button to directly view the user, or click “Search” without selecting a user to see a list of all matching users.

This will bring up the same overview as seen in the “Users With Pending Timesheets” section above.

Approving Timesheets

To approve or reject Timesheets select a date from the Timesheet overview for a user.

You will see another overview of all of their Timesheets submitted for that week, which you are authorized to view/approve.

Approval Overview for Royal.Maxwell@segula.uk, w/c Oct. 30, 2023

SRGL-401 **Submitted**

Date	Start	End	Hours
Mon 30/10	08:00	17:00	8.0
Tue 31/10	08:00	17:00	8.0
Wed 01/11	08:30	17:00	7.5
Thu 02/11	--:--	--:--	-
Fri 03/11	--:--	--:--	-
Sat 04/11	--:--	--:--	-
Sun 05/11	--:--	--:--	-
Total:			23.5

Details - **History**

Approve **Reject**

Personal Holiday **Submitted**

Date	Start	End	Hours
Mon 30/10	--:--	--:--	-
Tue 31/10	--:--	--:--	-
Wed 01/11	--:--	--:--	-
Thu 02/11	00:00	08:00	8.0
Fri 03/11	00:00	08:00	8.0
Sat 04/11	--:--	--:--	-
Sun 05/11	--:--	--:--	-
Total:			16.0

Details - **History**

Approve **Reject**

You can approve or reject Timesheets directly from this page or click on “Details” to show a detailed view of the submitted hours.

Detail Approval View

The detailed approval view lets you see the exact start and end times, break taken, location and description for the submitted Timesheet.

Royal Maxwell - Timesheet for: SRGL-401							
Date	Start	End	Break	Hours Worked	Location	Description	Status
Oct. 30, 2023	08:00	17:00	01:00	08:00	Home Office	Regular Project Work	Submitted
Oct. 31, 2023	08:00	17:00	01:00	08:00	Home Office	Presentation Preparation	Submitted
Nov. 1, 2023	08:30	17:00	01:00	07:30	Client Site	Presentation for client	Submitted
Nov. 2, 2023	00:00	00:00	00:00	00:00	----		Submitted
Nov. 3, 2023	00:00	00:00	00:00	00:00	----		Submitted
Nov. 4, 2023	00:00	00:00	00:00	00:00	----		Submitted
Nov. 5, 2023	00:00	00:00	00:00	00:00	----		Submitted
Approve Timesheet Reject Timesheet Back							

If another project manager has made a project member assignment for a user that you are the line manager of, you will be able to view their submitted Timesheets for that project, but will not be able to approve or reject them. See the example below:

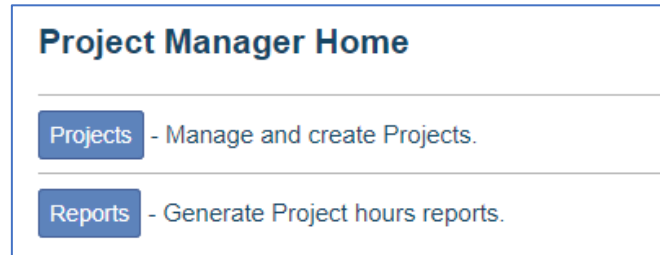
Royal Maxwell - Timesheet for: JJBA-231							
Date	Start	End	Break	Hours Worked	Location	Description	Status
Oct. 23, 2023	08:00	16:00	00:00	08:00	----		Submitted
Oct. 24, 2023	08:00	16:00	00:00	08:00	----		Submitted
Oct. 25, 2023	08:00	16:00	00:00	08:00	----		Submitted
Oct. 26, 2023	08:00	16:00	00:00	08:00	----		Submitted
Oct. 27, 2023	08:00	16:00	00:00	08:00	----		Submitted
Oct. 28, 2023	00:00	00:00	00:00	00:00	----		Submitted
Oct. 29, 2023	00:00	00:00	00:00	00:00	----		Submitted
View Only - Project Managed by "John Doe" Back							

Project member assignment requests will be described in detail in the “Line Manager” section.

Project Manager

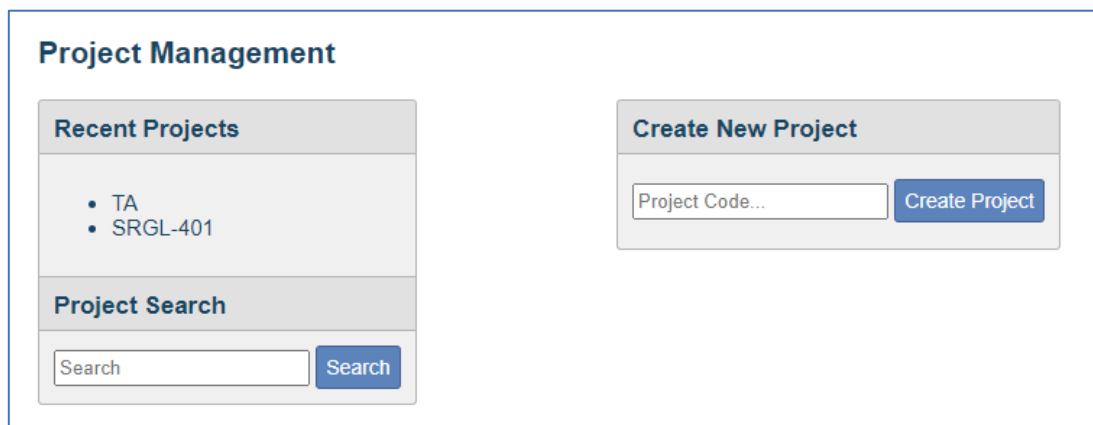
The Project Manager Role has two main functions:

- Project Management
- Project Reports



The image shows a mockup of the 'Project Manager Home' interface. It features a title bar at the top. Below the title bar, there are two main sections. The first section has a blue button labeled 'Projects' followed by the text '- Manage and create Projects.'. The second section has a blue button labeled 'Reports' followed by the text '- Generate Project hours reports.'.

Project Management



The image shows a mockup of the 'Project Management' interface. It is divided into two main panels. The left panel is titled 'Project Management' and contains two sub-sections. The first sub-section is 'Recent Projects', which lists two items: 'TA' and 'SRGL-401'. The second sub-section is 'Project Search', which includes a text input field labeled 'Search' and a blue 'Search' button. The right panel is titled 'Create New Project' and contains a text input field labeled 'Project Code...' and a blue 'Create Project' button.

The Project Management start page has two panels.

The first panel lets you select a project from a list of the 5 most recently created projects or use the search to find projects by project code. Similarly to the user search for the approval role, you can start typing a project code and select from the list of suggestions to view a project directly, or you can enter a search term and click on Search to see a list of all search results.

The second panel lets you create a new project. Simply enter a new project code and click on “Create Project”. You will be given a prompt to confirm the creation.

Project Details

On the Project Details, you have two main panels, one for project member controls (1) and one for general project controls (2).

The screenshot displays the 'Details for Project: SRGL-401' interface. It is divided into two main panels, both highlighted with orange boxes and numbered 1 and 2.

Panel 1: Member Controls

- Add Members:** Includes a text input field labeled 'Member to add...' and an 'Add' button.
- Request Members:** Includes a description 'Create a request to add members from a different line manager.' and a 'Create Request' button.
- Project Members:** A list of five members, each with a name and a button with an 'X' to remove them:
 - Melani Newman
 - Bodhi White
 - Royal Maxwell
 - Maeve Levy
 - Cayden Christian

Panel 2: Project Controls

- Retire Project:** A button with the text 'Retire Project - Retire a project that is no longer being worked on.'
- Total Project Hours:** Displays '12136.0' with a 'View Hours' button next to it.
- Detailed Report:** Includes two date pickers for 'Start Date' and 'End Date' (both showing 'dd/mm/yyyy') and a 'Generate Report' button.

Member Controls

- **Add Members:** To add a user to a project, start typing their name into the search bar, select their name from the list of results and click "Add".
Only users that you are the line manager for will show up through the search.
- **Request Members:** To add a user from a different line manager to your project, click on "Create Request" to create a Project Member Assignment Request. (Details in the following section).
- **Project Members:** A list of all current project members. Click on the "X" next to a name to remove the user from the project.

Project Controls

- **Retire Project:** Retire the project. Project members will no longer be able to submit hours for this project and you will not be able to add/remove project members or make assignment requests. This can be undone at any time.
- **Total Project Hours:** Shows all hours entered for the project so far. Click "View Hours" for a more detailed view, broken down by month.
- **Detailed Report:** Enter a start and end date and click on Generate Report to download a spreadsheet with all submitted user hours for that timeframe, broken down by user.

Project Member Assignment Requests

Here, you can create requests to add project members from other line managers to your project.

Request Project Member

Project Code:
SRGL-401

Member to Request:

Line Manager: -

Start Date:
 

End Date:
 

Additional Notes:

To create a request, find and select the person you want to request by starting to type their name into the search bar and selecting them from the list.

The start date is mandatory, but the end date and additional notes are optional.

Before the request is submitted, you will see a summary of your request.

Once you confirm the request, it will be sent to the users line manager for approval.

Project Reporting

If you want to generate hour reports for multiple projects, instead of going through each project's detail view and generating the report from there, you can go to the "Project Reporting" page from the Project Manager home start page.

Reports

Project Reporting

Project:

Start Date: 

End Date: 

Line Manager

Other than Timesheet approval for default projects, the Line Manager role has only one function.

Line Manager Home

Assignment Requests - View and manage Project Assignment Requests

Assignment Requests

On this page, you will see a list of pending, active and inactive project member requests.

Project Member Assignment Requests

Pending Requests

Requested User	Project	Status
Deborah Miller	ARC-421	Pending

Active Requests

Requested User	Project	Status
Royal Maxwell	JJBA-231	Active

Inactive Requests

- No inactive requests.

To view the details for a request, click on the button showing the status for it.

Requested User:

Deborah Miller

Requested By:

John Doe

Project:

ARC-421

Start:

Oct. 30, 2023

End:

--/--/--

Additional Notes:

Approve

Reject

Approval for a request can be revoked at any point, by going into the details of an active request and selecting "Revoke".

However, inactive requests (expired or rejected) can not be retroactively approved.