



Alloc8 User Guide

Advanced Timesheeting

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Advanced Timesheets

Contents

1. Submitting a timesheet on mobile	2
1.1 Entering a timesheet	2
Step 1 - Complete	2
1.2 Sign and accept exceptions	3
Step 2 - Sign	3
1.3 Submitting timesheet	4
Step 3 - Submit	4
1.4 Emailing the timesheet to your site contact	5
2. Submitting timesheet on web	7
2.1 Signature not required	8
2.2 Signature required	8
2.3 Finalise and submit on mobile (signatures required)	9
3. Editing a signed timesheet on web	10
3.1 Requiring new signatures	10
Clear signatures and require new ones	10
Sign and resubmit on mobile	12
3.2 Do not require new signatures	13

Overview

Alloc8's latest improvements allow you to maximise control, minimise errors and track changes on timesheets. Our latest advancements in timesheeting give web users the power to submit and correct timesheets the web app. With the introduction of new workflows, new notifications, additional validations and audit trails we have greatly reduced the chance of timesheeting errors by people in Alloc8.

1. Submitting a Timesheet on mobile

1.1 Entering a timesheet

NAME	TRAVEL START	SHIFT START	BREAK START	BREAK END	SHIFT END	TRAVEL END	TRAVEL TO (KM)	TRAVEL DURING (KM)	TRAVEL FROM (KM)
Chloe Price									
Rachel Amber									

There are incomplete fields in your timesheet.

NOTES

Figure 1. Timesheet screen - Step 1

Step 1 - Complete

Only the timesheet manager on the shift will be able to create, edit and submit timesheets.

If there is more than one person on the shift you can simply apply the same times to all by toggling on "Apply same hours to all"

Timesheet exceptions

If the timesheet manager enters times that look to be incorrect the exceptions will be highlighted in **orange**. The Confirm and Sign button also changes its color depending on the timesheet.

Orange - if there are times in the timesheet that look abnormal.

Blue - if there are no timesheet exception warnings present

NAME	TRAVEL START	SHIFT START	BREAK START	BREAK END	SHIFT END	TRAVEL END	TRAVEL TO (KM)	TRAVEL DURING (KM)	TRAVEL FROM (KM)
Chloe Price	02:00	04:00	04:00	07:30	08:00	10:30			
Rachel Amber	02:00	04:00	04:00	07:30	08:00	10:30			

There are items that need your confirmation before signing.

NOTES

Figure 2. Timesheet screen - Step 1 (Timesheet exceptions)

1.2 Sign and accept exceptions

Timesheet
Alloc8

13

COMPLETE SIGN SUBMIT

NAME	TRAVEL START	SHIFT START	BREAK START	BREAK END	SHIFT END	TRAVEL END	TRAVEL TO (KM)	TRAVEL DURING (KM)	TRAVEL FROM (KM)
Chloe Price	02:00	04:00	04:00	07:30	08:00	10:30	-	-	-
<ul style="list-style-type: none">1 Did Chloe Price travel 2 hours to this job?1 Did Chloe Price take a break 1 day after the shift start?1 Did Chloe Price take a break for 3 hours 30 minutes?1 Did Chloe Price work for 1 day 30 minutes on this job?1 Did Chloe Price finish the shift 1 day 2 hours after the allocated shift end?1 Did Chloe Price travel 2 hours 30 minutes from this job?1 Was the total travel time 4 hours 30 minutes?									
Rachel Amber	02:00	04:00	04:00	07:30	08:00	10:30	-	-	-

NOTES

Submit Timesheet on Mobile

OPERATOR SIGN OFF

Rachel Amber

SIGN HERE CLEAR X

Rachel

CLIENT SIGN OFF

☒ I have read the shift notes and/or confirm all time exceptions. Please confirm to sign

CLIENT NOT ON SITE ☐

Jane Doe

SIGN HERE CLEAR X

Jane

Edit Timesheet Review and submit

Figure 3. Timesheet screen - Step 2

Step 2 - Sign

After completing timesheets, the Operator and Client will be asked to provide their signatures for sign off.

The Timesheet rows for each worker can be expanded to show alerts if there are excessive hours.

Client On Site (toggle OFF):

If the client is onsite, they must confirm that they have read the shift notes and accept all time exceptions by ticking the checkbox below the Client Sign Off label before signing the paperwork.

Client Not On Site (toggle ON):

If the client is not onsite, this checkbox will be hidden.

Upon signing, the Timesheet Manager can click the Review and submit button to proceed with submitting the timesheet.

Or they can click the Edit Timesheet button if they choose to make changes on the timesheet. This will clear all signatures.

1.3 Submitting timesheet

NAME	TRAVEL START	SHIFT START	BREAK START	BREAK END	SHIFT END	TRAVEL END	TRAVEL TO (KM)	TRAVEL DURING (KM)	TRAVEL FROM (KM)
Chloe Price	02:00	04:00	04:00	07:30	08:00	10:30	-	-	-
Rachel Amber	02:00	04:00	04:00	07:30	08:00	10:30	-	-	-

NOTES

Submit Timesheet on Mobile

OPERATOR SIGN OFF

CLIENT SIGN OFF

Operator Name: Rachel Amber

Client Name: Jane Doe

Edit Timesheet Submit

Figure 4. Timesheet Screen - Step 3

Step 3 - Submit

The last step allows the Timesheet Manager to review timesheet, notes, and signatures. They can then click the Submit button to submit the Timesheet PDF and Paperwork PDF if no changes to the timesheet is needed.

Confirm and submit?

Not yet Yes

Figure 5. Confirm and submit pop-up dialog

A dialog is displayed to confirm the timesheet submission.

To successfully submit the timesheet, the Timesheet Manager must click the "Yes" button.

1.4 Emailing the timesheet to your site contact

Once the Timesheet has been submitted on the mobile app, the Timesheet PDF for the job is created. This will include client and operator signatures, timestamp and GPS coordinates of where the Timesheet was submitted.

A copy of the Timesheet PDF is then automatically emailed to the job's site contact as part of the Paperwork PDF.

ABC TRAFFIC MANAGEMENT

Client
ABC Pty Ltd

Job Address
255 Pitt Street, Sydney NSW 2000 Australia

Authorised By
Jane Doe

Purchase Order Number

Ticket#
3198

Date
28/10/2019

Submitted By
Rachel Amber (25/10/2019 11:51)
33.985805, -118.2541117

Vehicle
Ute with AB

Notes
Submit Timesheet on Mobile

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Shift Total	Travel Total	Travel To (KM)	Travel From (KM)
Chloe Price	02:00	04:00	04:00	07:30	08:00	10:30	0.5	0.0	0.0	0.0
Rachel Amber	02:00	04:00	04:00	07:30	08:00	10:30	0.5	0.0	0.0	0.0

Vehicle	Quantity
Ute with AB	1

Client Sign Off
Jane Doe

Operator Sign Off
Rachel Amber

Handwritten signatures: Jane and Rachel

Figure 6. Timesheet PDF with signatures

The Alloc8 web app will reflect the latest timesheet submitted from mobile along with the notes and signatures.

Timesheet #3198

Ticket Details
3198
Mon, 28 Oct 2019 - 4:00

Company
ABC Pty Ltd

Ticket Address
255 Pitt Street, Sydney NSW
2000 Australia

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End
Chloe Price	2:00	4:00	4:00	7:30	8:00	10:30
Rachel Amber	2:00	4:00	4:00	7:30	8:00	10:30

Notes
Submit Timesheet on Mobile

Signatures
Operator Sign Off: Rachel
Client Sign Off: Jane Doe

Figure 7. Timesheet on web with notes and signatures

You can also download the Timesheet PDF at anytime via the job menu icon on the View Jobs page or on the job card in the Whiteboard page.

Manage Tickets

Search: 3198

Job Type: Oakleigh

Branch(es): ABC Pty Ltd

Site Contact: Jane Doe

Start Date And Time: 28/10/2019 - 4:00

Confirmed: Yes

Actions: Add Related Item, Related Ticket Billing Preferences, Download Ticket PDF, Download Timesheet PDF, Download Paperwork PDF

Figure 8. Download Timesheet PDF on View Jobs page

2. Submitting Timesheet on web

If your workers have not submitted their timesheets via mobile you will now be able to submit timesheets via the Alloc8 web app.

Simply go to the job timesheet page, complete the timesheet and click the Save button.

A pop-up dialog will be displayed asking you if you require signatures or not in the mobile app.

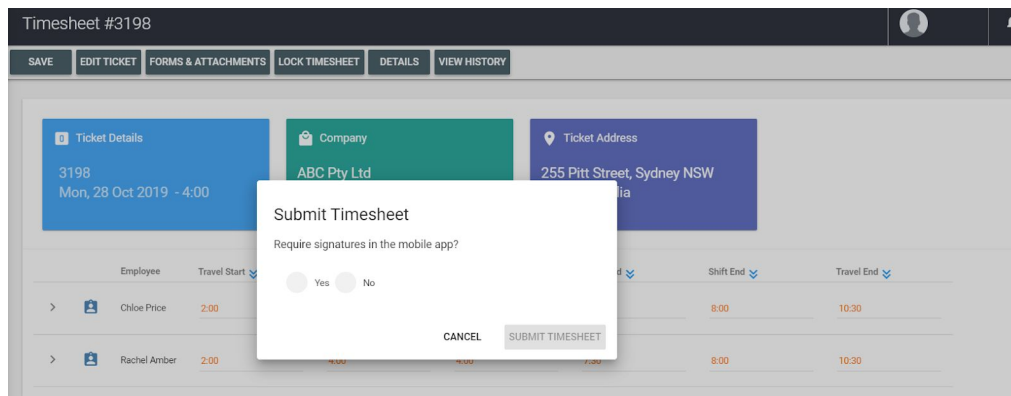


Figure 9. Submit Timesheet pop-up dialog

2.1 Signature not required

If you choose “No” to signature required, you can proceed to submit the timesheet without providing a reason for creating the timesheet on web.

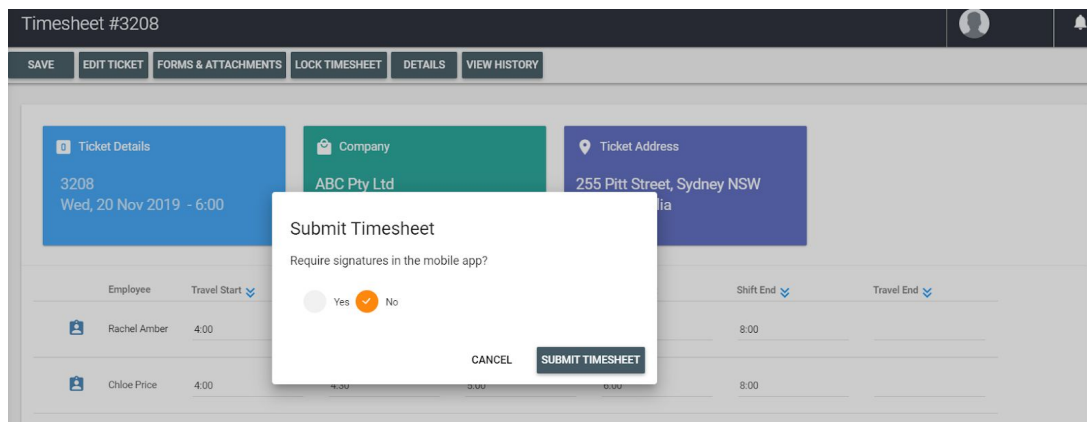


Figure 10. Do not require signatures

Once the Timesheet has been submitted the *Timesheet PDF* and *Paperwork PDF* are sent to your site contact.

A notification will also be sent to the crew informing them that a timesheet had been submitted for their job. They will be able to view the Timesheet PDF via the attachments tab in mobile.

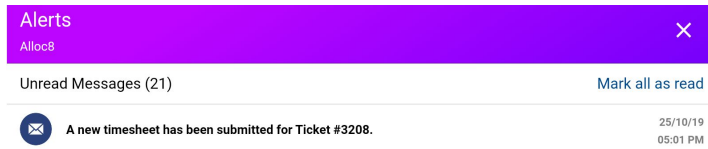


Figure 10. Push notification for timesheet edits without reason

2.2 Signature required

If you require your field workers to obtain a signature for the timesheet select “Yes”. You will need to provide a short reason for why this timesheet was submitted on the web.

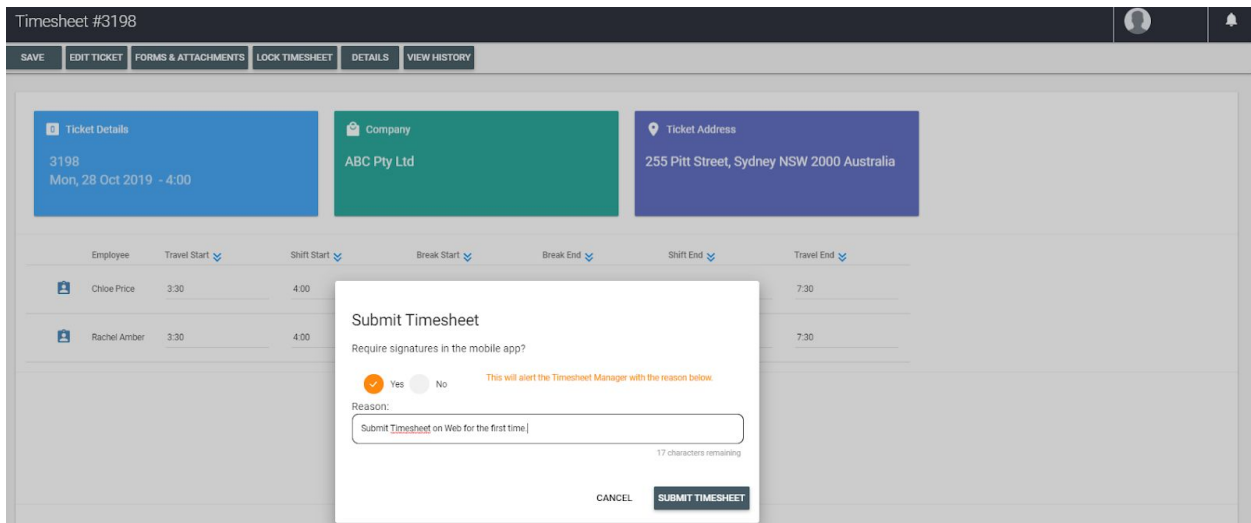


Figure 11. Require signatures in the mobile app

The Timesheet Manager in the field will then be sent an in-app notification with this reason, and they will be required to sign and get the client signature before the timesheet is finalised.

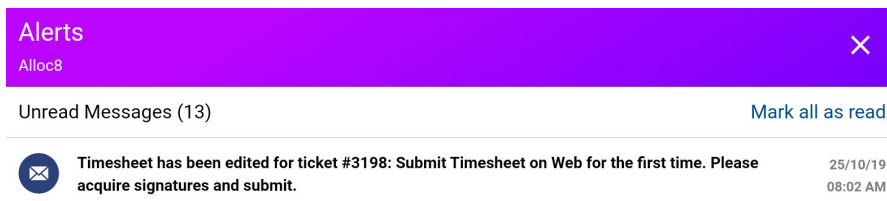


Figure 12. Push notification for timesheet edits with reason

2.3 Finalise and submit on mobile (signatures required)

When the Timesheet Manager visits the Timesheet tab for that job in the mobile app, they can see the timesheet that was entered on the web, with the time and date on when it was last submitted.

The Timesheet Manager then needs to click the Sign and resubmit timesheet button to acquire signatures and finalise the timesheet.

The screenshot shows the 'Timesheet' screen in a mobile app. At the top, there is a purple header with the text 'Timesheet' and 'Alloc8' below it. A red notification bubble with the number '13' is in the top right corner. Below the header is a table with the following columns: NAME, TRAVEL START, SHIFT START, BREAK START, BREAK END, SHIFT END, TRAVEL END, TRAVEL TO (KM), TRAVEL DURING (KM), and TRAVEL FROM (KM). The table contains two rows of data for 'Chloe Price' and 'Rachel Amber'. Below the table is a 'NOTES' section with a large white text area. At the bottom, it says 'SUBMITTED AT 08:02 ON 25 OCTOBER 2019' and has a button labeled 'Sign and resubmit timesheet'.

NAME	TRAVEL START	SHIFT START	BREAK START	BREAK END	SHIFT END	TRAVEL END	TRAVEL TO (KM)	TRAVEL DURING (KM)	TRAVEL FROM (KM)
Chloe Price	03:30	04:00	04:30	05:00	06:00	07:30	—	—	—
Rachel Amber	03:30	04:00	04:30	05:00	06:00	07:30	—	—	—

NOTES

SUBMITTED AT 08:02 ON 25 OCTOBER 2019

[Sign and resubmit timesheet](#)

Figure 13. Timesheet screen on mobile with timesheet edits from web

3. Editing a signed Timesheet on web

If a timesheet has been submitted on the mobile app but further updates are needed, you can edit these timesheets on the Alloc8 web app.

Once you Save, a dialog will be displayed asking if you require new Operator and Client signatures or not in the mobile app.

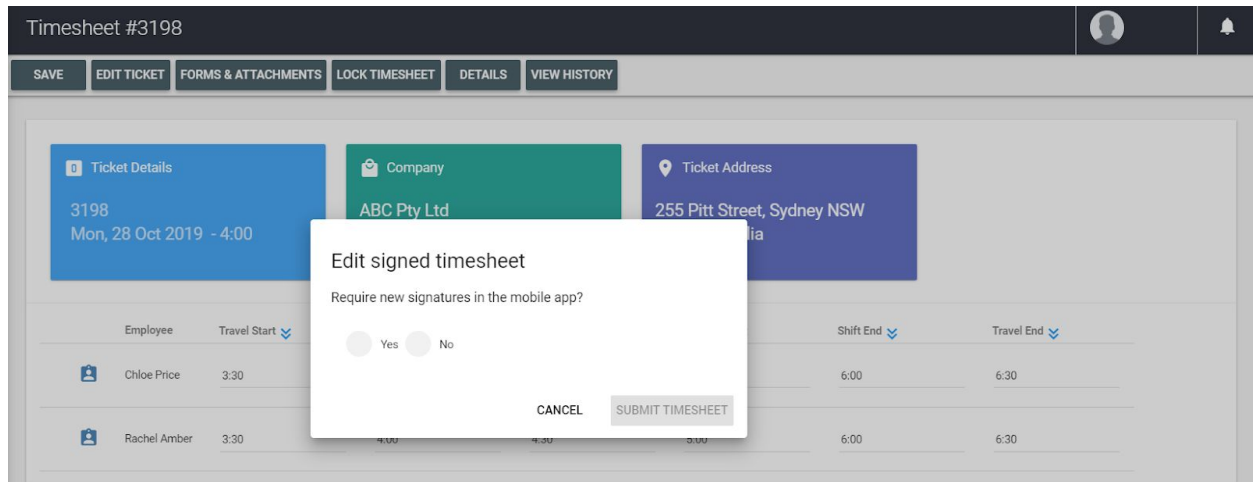


Figure 14. Edit signed timesheet pop-up dialog

3.1 Requiring new signatures

Clear signatures and require new ones

If you choose require signatures by selecting “Yes”, they will need to provide a reason for editing the timesheet on web. This will clear all current signatures done in the mobile app.

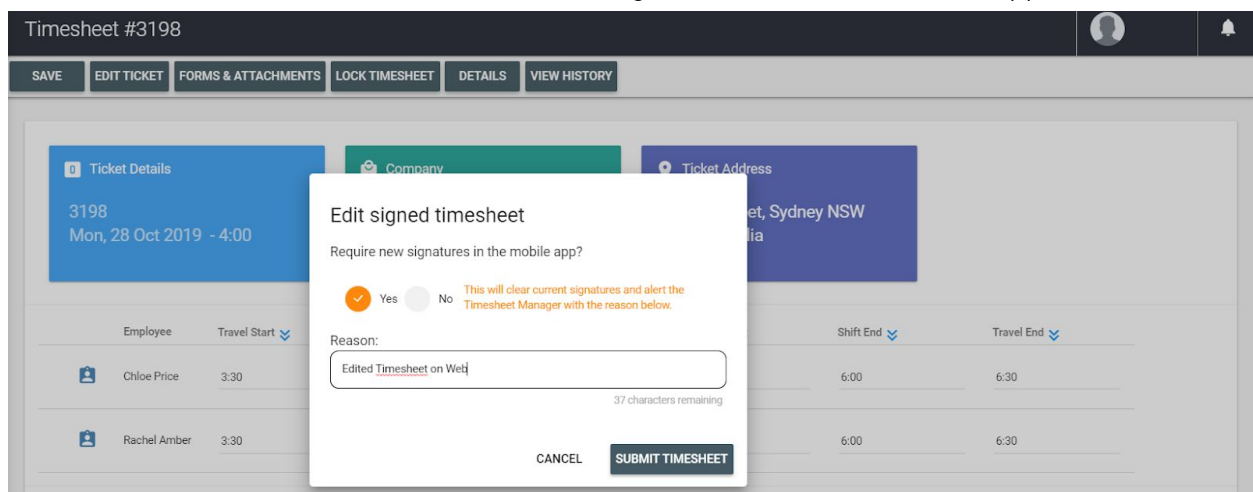


Figure 15. Require new signatures in the mobile app

After submitting the edited timesheet on the web, the reason for editing timesheet will be shown on the Timesheet Edits section with the date and time it was edited.

Timesheet #3198

SAVE | EXIT TICKET | FORMS & ATTACHMENTS | LOCK TIMESHEET | DETAILS | VIEW HISTORY

Ticket Details
3198
Mon, 28 Oct 2019 - 4:00

Company
ABC Pty Ltd

Ticket Address
255 Pitt Street, Sydney NSW
2000 Australia

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End
Chloe Price	3:30	4:00	4:30	5:00	6:00	6:30
Rachel Amber	3:30	4:00	4:30	5:00	6:00	6:30

Notes

Submit Timesheet on Mobile

Timesheet edits

25/10/2019 01:51
Edited Timesheet on Web

Figure 16. Timesheet edits section in Timesheet screen

ABC TRAFFIC MANAGEMENT

Client
ABC Pty Ltd

Job Address
255 Pitt Street, Sydney NSW 2000 Australia

Authorised By
Jane Doe

Purchase Order Number

Ticket#
3198

Date
28/10/2019

Submitted By
Rachel Amber (25/10/2019 11:51)
33.985805, -118.2541117

Vehicle
Ute with AB

Notes

Submit Timesheet on Mobile

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Shift Total	Travel Total	Travel To (KM)	Travel From (KM)
Chloe Price	02:00	04:00	04:00	07:30	08:00	10:30	0.5	0.0	0.0	0.0
Rachel Amber	02:00	04:00	04:00	07:30	08:00	10:30	0.5	0.0	0.0	0.0

Vehicle	Quantity
Ute with AB	1

Client Sign Off **Operator Sign Off**

Timesheet Edits

(10/25/2019 01:51)

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Shift Total	Travel Total	Travel To (KM)	Travel From (KM)
Chloe Price	03:30	04:00	04:30	05:00	06:00	06:30	1.5	0.0	0.0	0.0
Rachel Amber	03:30	04:00	04:30	05:00	06:00	06:30	1.5	0.0	0.0	0.0

Reason for editing

Edited Timesheet on Web

Figure 17. Timesheet PDF with cleared signatures and Timesheet Edits section

The amended times and reason for change are also added to the Timesheet PDF on the Timesheet Edits section underneath the original timesheet with cleared signatures. The updated times are highlighted in yellow.

Note: Once the Timesheet Manager resubmits timesheet on mobile, the Timesheet Edits section will no longer be available on the Timesheet screen on web and Timesheet PDF.

Sign and resubmit on mobile

Timesheet Managers will then be notified through a push notification with the reason for submitting timesheet on the web.

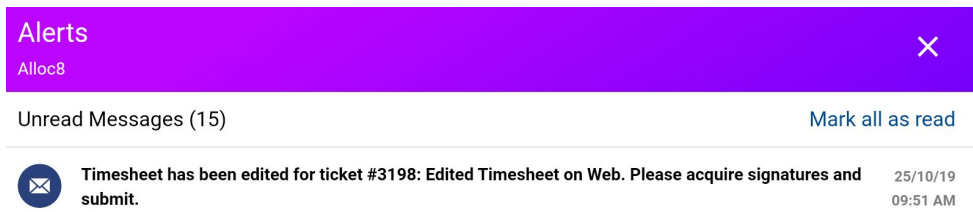
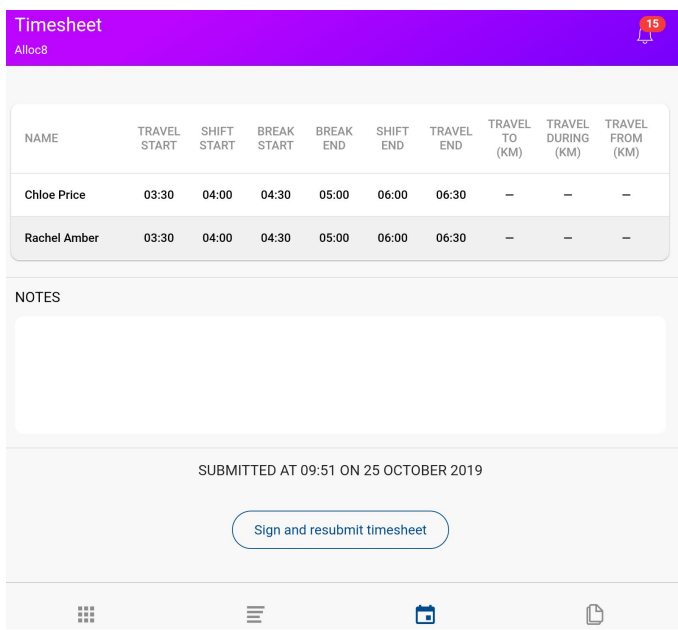


Figure 18. Push notification for timesheet edits with reason



The timesheet screen on mobile will show the updated times entered from web with the time and date on when it was last submitted.

To acquire new signatures, the Timesheet Manager needs to click the 'sign and resubmit timesheet' button.

Figure 19. Timesheet screen on mobile with timesheet edits from web

3.2 Do not require new signatures

If you choose to not require signatures by selecting “No”, you will still need to provide a reason for editing the timesheet on web. This reason can be more detailed (400 characters). The original signatures done in the mobile app will be kept.

The screenshot shows the 'Edit signed timesheet' dialog box overlaid on the 'Timesheet #3198' interface. The dialog box has a title 'Edit signed timesheet' and a question 'Require new signatures in the mobile app?'. There are two radio buttons: 'Yes' (unselected) and 'No' (selected). To the right of the 'No' button, there is a note: 'This will keep any current signatures and attach the new changes to the original timesheet.' Below the radio buttons is a text input field labeled 'Reason:' containing the text 'No signatures required'. At the bottom of the dialog box, there are two buttons: 'CANCEL' and 'SUBMIT TIMESHEET'. The background interface shows the 'Ticket Details' for ticket 3198, dated Mon, 28 Oct 2019 - 4:00, and a table of employees with their travel start and end times.

Employee	Travel Start
Chloe Price	3:30
Rachel Amber	3:30

Shift End	Travel End
6:00	7:00
6:00	7:00

Figure 20. Do not require new signatures in the mobile app

Timesheet #3198

SAVE EDIT TICKET FORMS & ATTACHMENTS LOCK TIMESHEET DETAILS VIEW HISTORY

Ticket Details
 3198
 Mon, 28 Oct 2019 - 4:00

Company
 ABC Pty Ltd

Ticket Address
 255 Pitt Street, Sydney NSW
 2000 Australia

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End
Chloe Price	3:30	4:00	4:30	5:30	6:00	7:00
Rachel Amber	3:30	4:00	4:30	5:30	6:00	7:00


Notes


Resubmit in Mobile App

Timesheet edits

26/10/2019 03:07
No signatures required


Signatures

Operator Sign Off

 Operator name Rachel Amber

Client Sign Off

 Client name Jane Doe

After submitting the edited timesheet on the web, the client and operator signatures will remain on the Timesheet screen and the reason for editing timesheet will be shown on the Timesheet Edits section with the date and time it was edited.

Figure 21. Timesheet edits section in Timesheet screen with signatures



Client
 ABC Pty Ltd

Job Address
 255 Pitt Street, Sydney NSW 2000 Australia

Authorised By
 Jane Doe

Purchase Order Number

Ticket#
 3198

Date
 28/10/2019

Submitted By
 Rachel Amber (25/10/2019 15:14)
 33.983605, -151.2541117


Vehicle
 Ute with AB


Notes

Resubmit in Mobile App

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Shift Total	Travel Total	Travel To (KM)	Travel From (KM)
Chloe Price	03:30	04:00	04:30	05:00	06:00	07:00	1.5	0.0	0.0	0.0
Rachel Amber	03:30	04:00	04:30	05:30	06:00	07:00	1.5	0.0	0.0	0.0

Vehicle	Quantity
Ute with AB	1

Client Sign Off
 Jane Doe


Operator Sign Off
 Rachel Amber


Timesheet Edits

(10/26/2019 03:07)

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Shift Total	Travel Total	Travel To (KM)	Travel From (KM)
Chloe Price	03:30	04:00	04:30	05:30	06:00	07:00	1	0.0	0.0	0.0
Rachel Amber	03:30	04:00	04:30	05:30	06:00	07:00	1	0.0	0.0	0.0

Reason for editing

No signatures required

The client and operator signatures on the Timesheet PDF will remain and the amended times and reason for change are added on the Timesheet Edits section underneath the original timesheet. The updated times are highlighted in yellow. A copy of the updated Timesheet PDF is emailed to the job's Site Contact.

Figure 21. Timesheet PDF with signatures and Timesheet Edits section

A push notification is sent to the crew not after making changes and submitting the timesheet on web

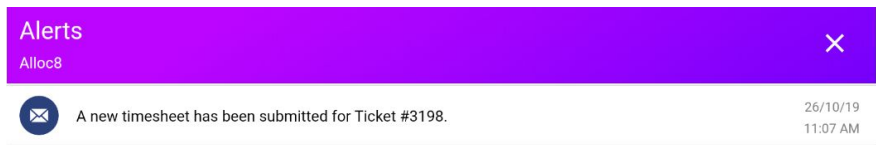
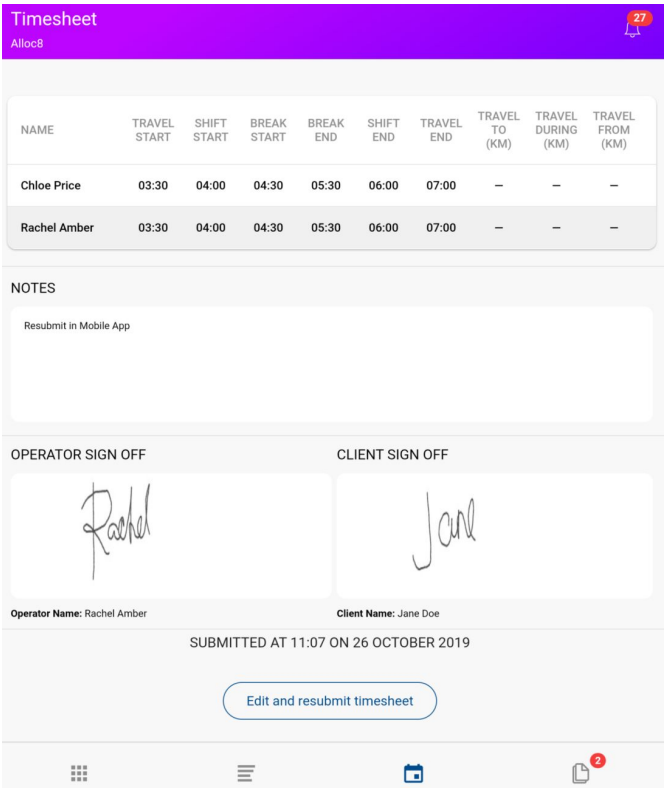


Figure 22. Push notification for timesheet edits without reason



When the Timesheet Manager visits the Timesheet screen on mobile, they will see the updated times entered from web with the time and date on when it was last submitted.

The notes and signatures remain.

Figure 23. Timesheet screen on mobile with signatures and timesheet edits from web