



Alloc8 User Guide

Advanced Timesheeting

Last Updated: November 2019

Advanced Timesheets

Contents

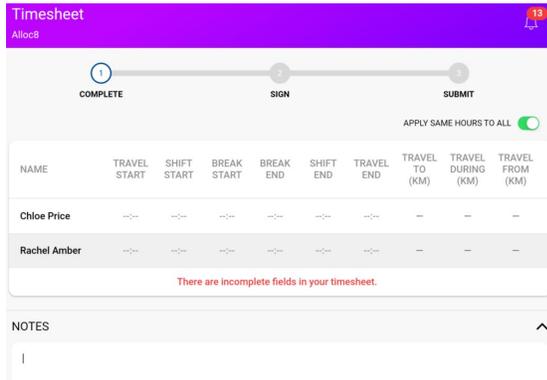
1. Submitting a timesheet on mobile	2
1.1 Entering a timesheet	2
Step 1 - Complete	2
1.2 Sign and accept exceptions	3
Step 2 - Sign	3
1.3 Submitting timesheet	4
Step 3 - Submit	4
1.4 Emailing the timesheet to your site contact	5
2. Submitting timesheet on web	7
2.1 Signature not required	8
2.2 Signature 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



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"

Figure 1. Timesheet screen - Step 1

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

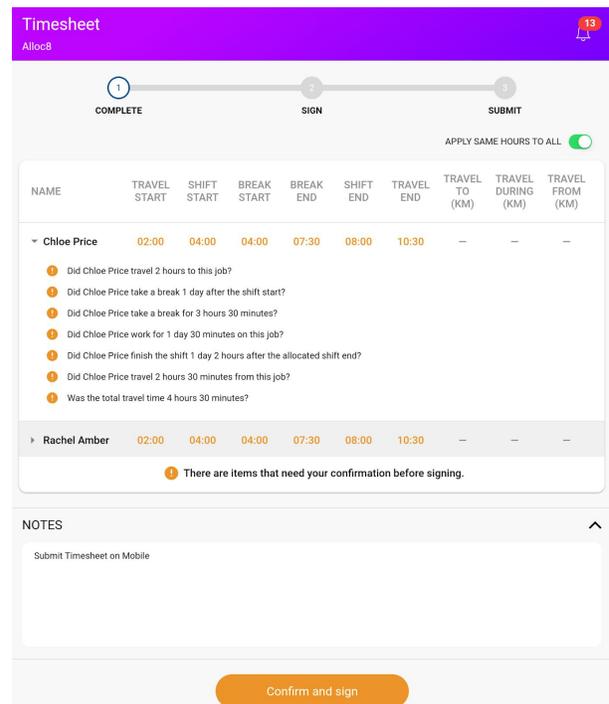


Figure 2. Timesheet screen - Step 1 (Timesheet exceptions)

1.2 Sign and accept exceptions

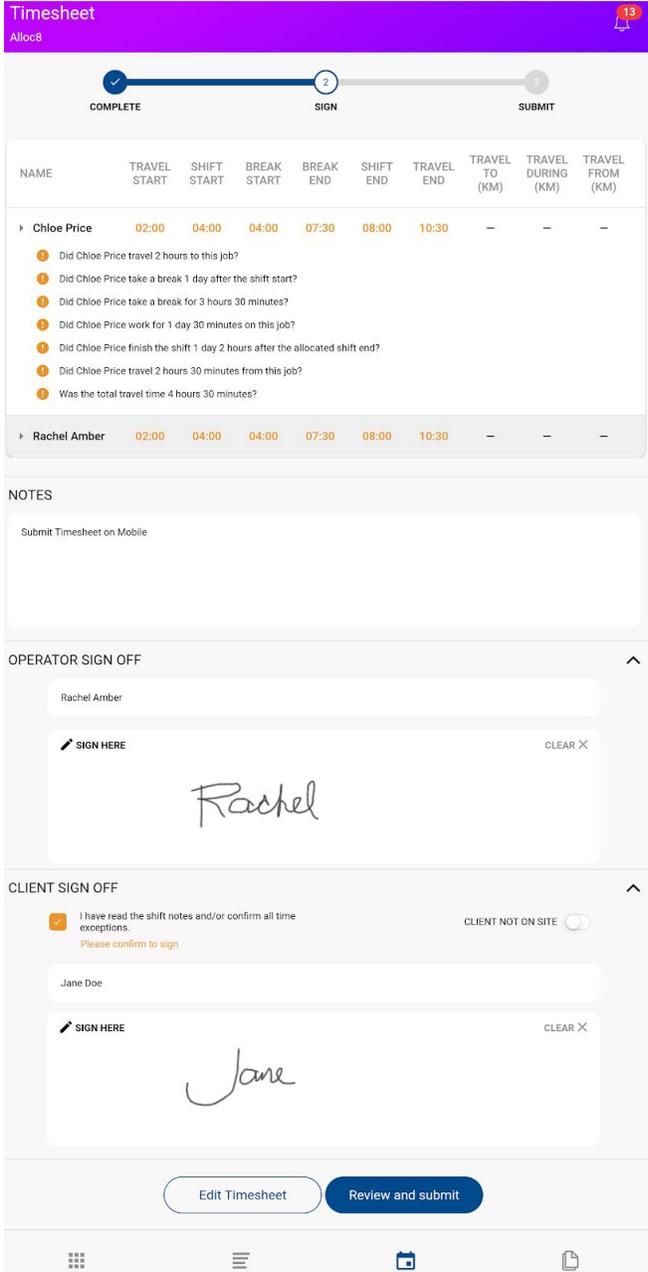


Figure 3. Timesheet screen - Step 2

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.

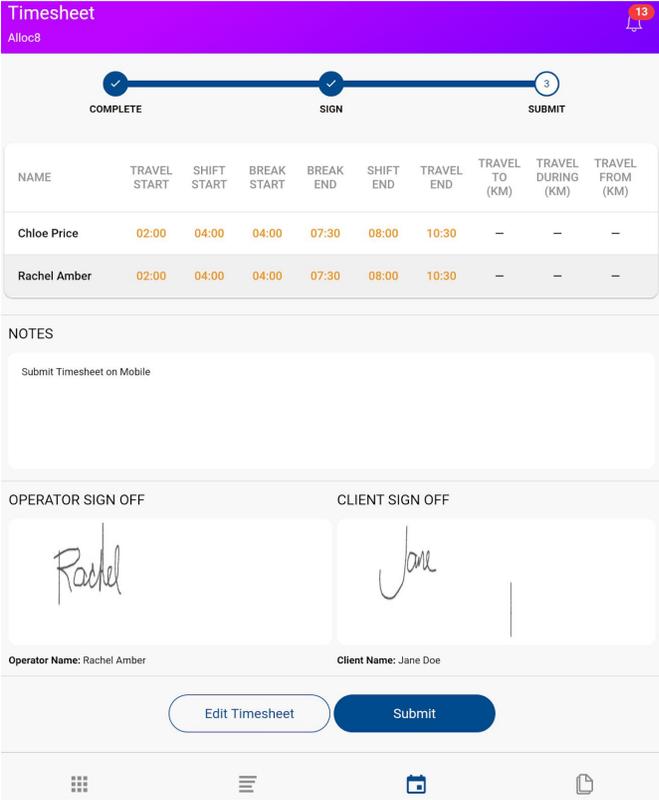
Client Not On Site (toggle ON):

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.

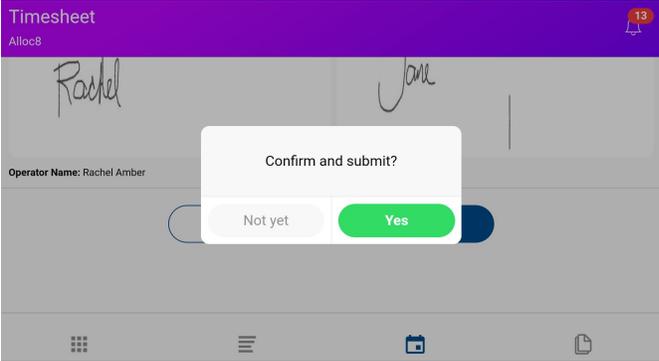
1.3 Submitting timesheet



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.

Figure 4. Timesheet Screen - Step 3



A dialog is displayed to confirm the timesheet submission.

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

Figure 5. Confirm and submit pop-up dialog

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.

**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 ByRachel 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

Figure 6. Timesheet PDF with signatures

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

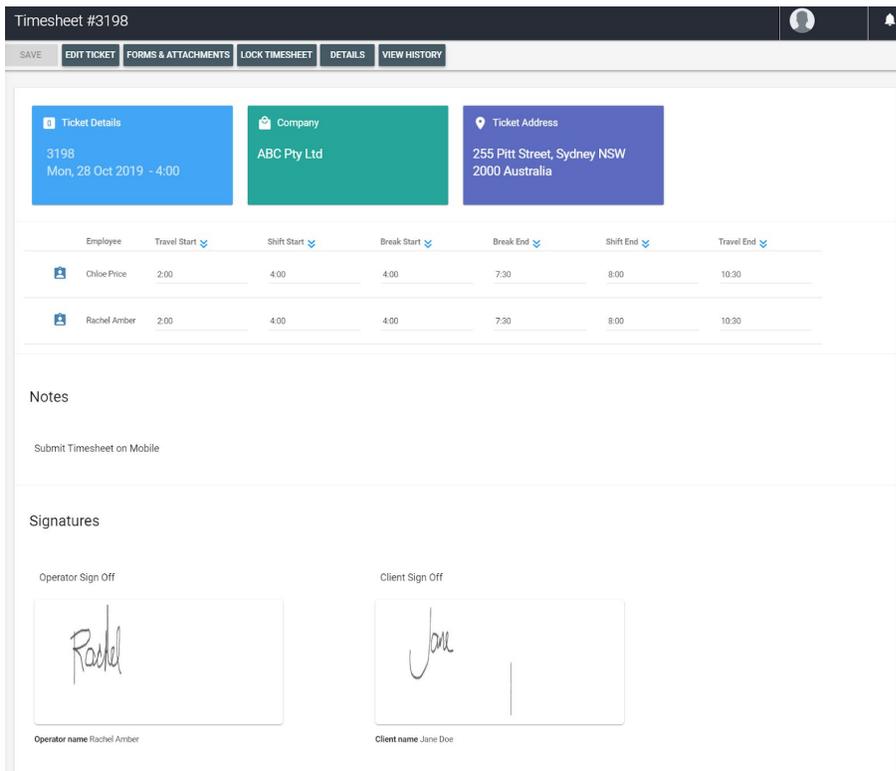


Figure 7. Timesheet on web with notes and signatures

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.

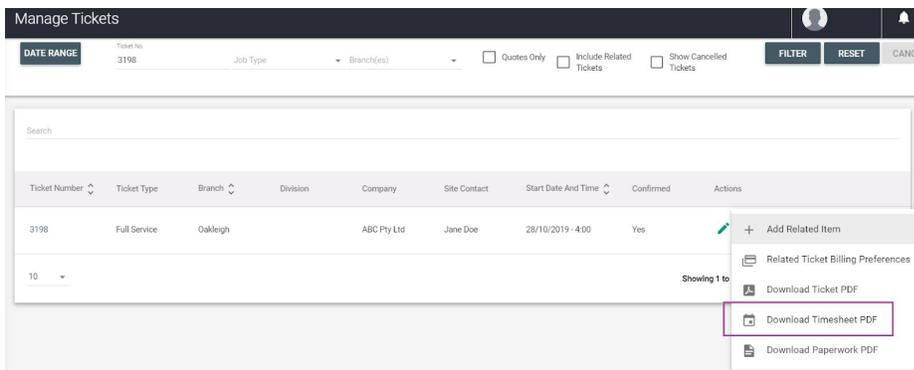


Figure 8. Download Timesheet PDF on View Jobs page

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.

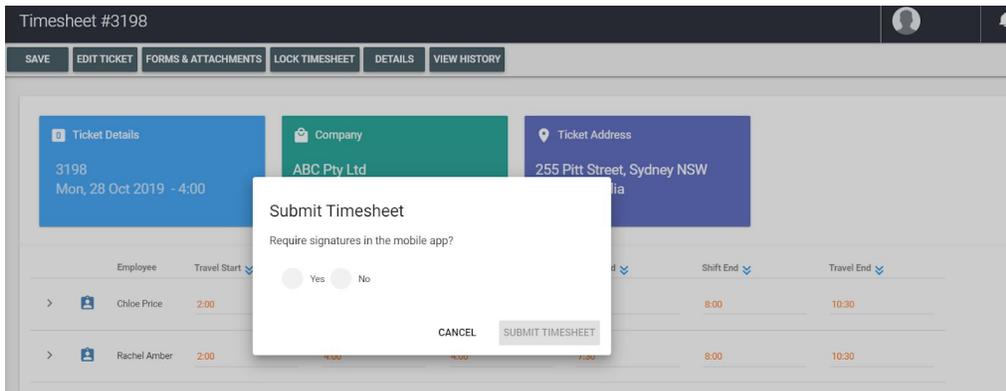


Figure 9. Submit Timesheet pop-up dialog

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.

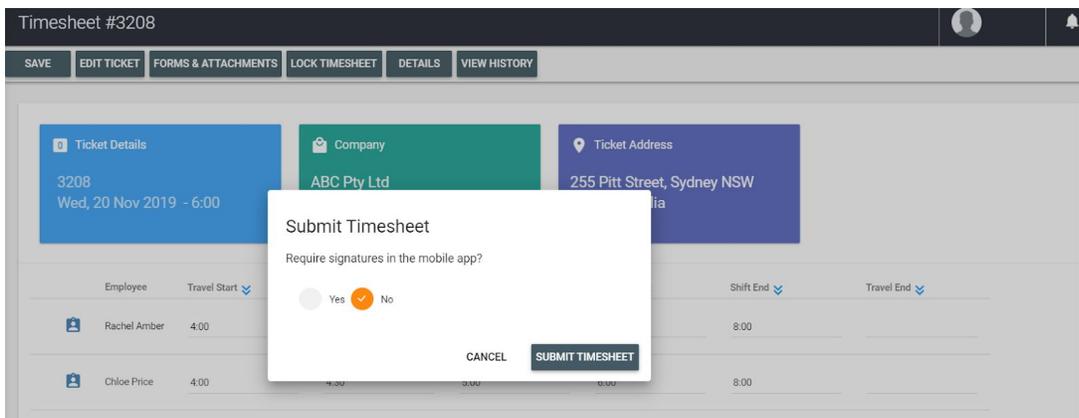


Figure 10. Do not require signatures

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.

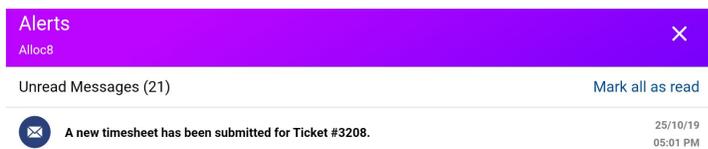


Figure 10. Push notification for timesheet edits without reason

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.

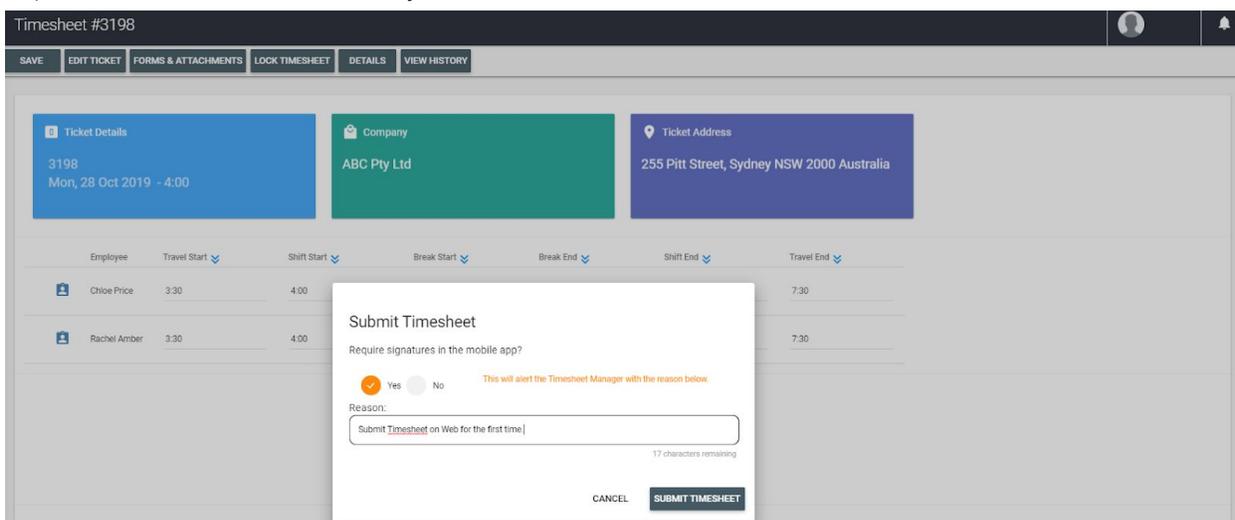


Figure 11. Require signatures in the mobile app

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.

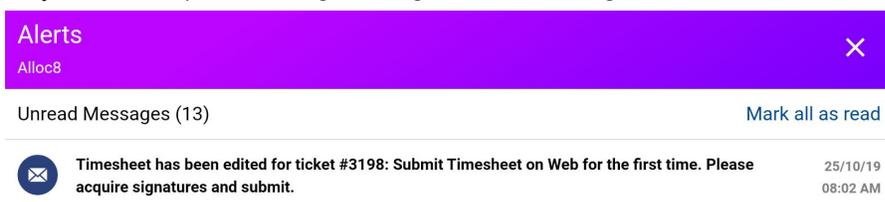


Figure 12. Push notification for timesheet edits with reason

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.

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.

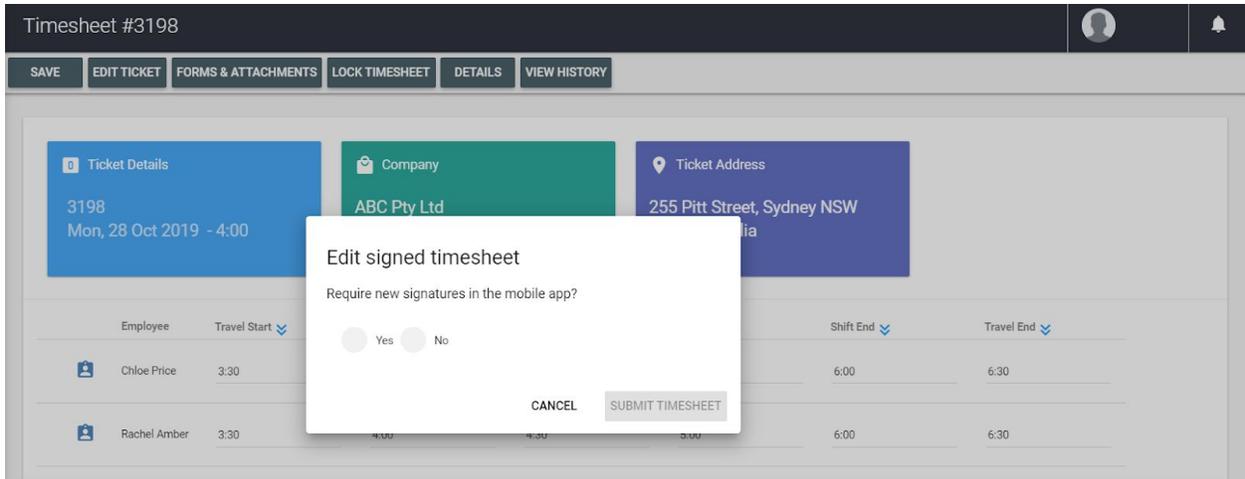


Figure 14. Edit signed timesheet pop-up dialog

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.

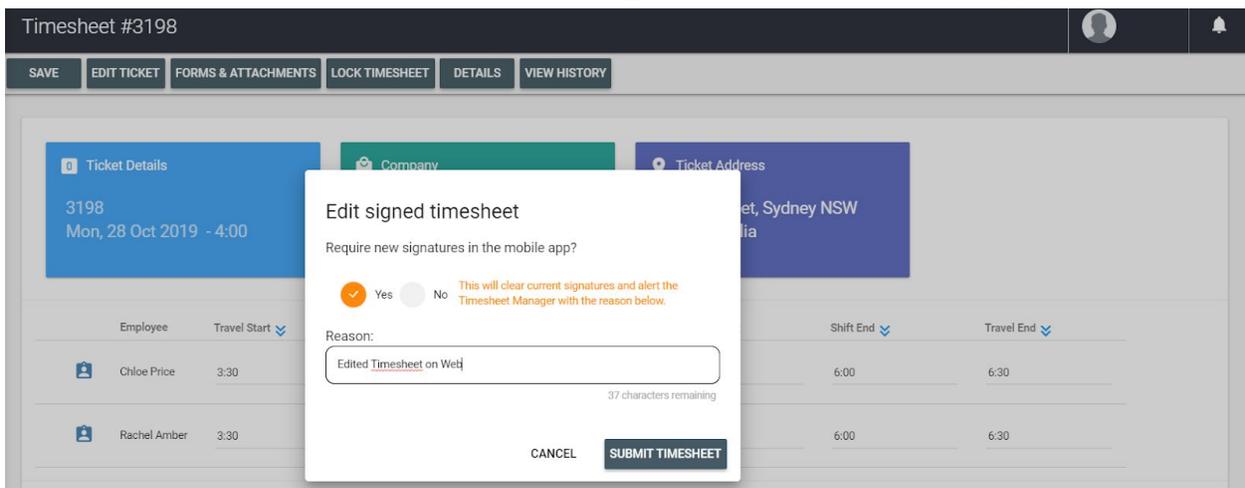


Figure 15. Require new signatures in the mobile app

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.

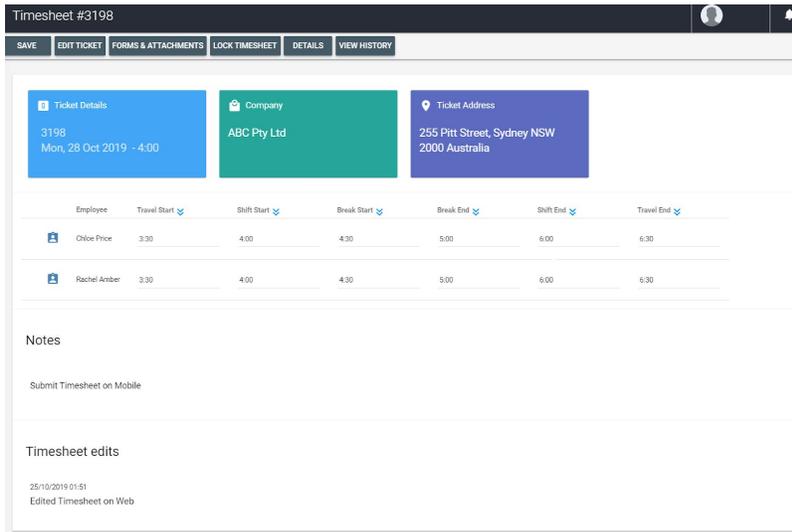


Figure 16. Timesheet edits section in Timesheet screen

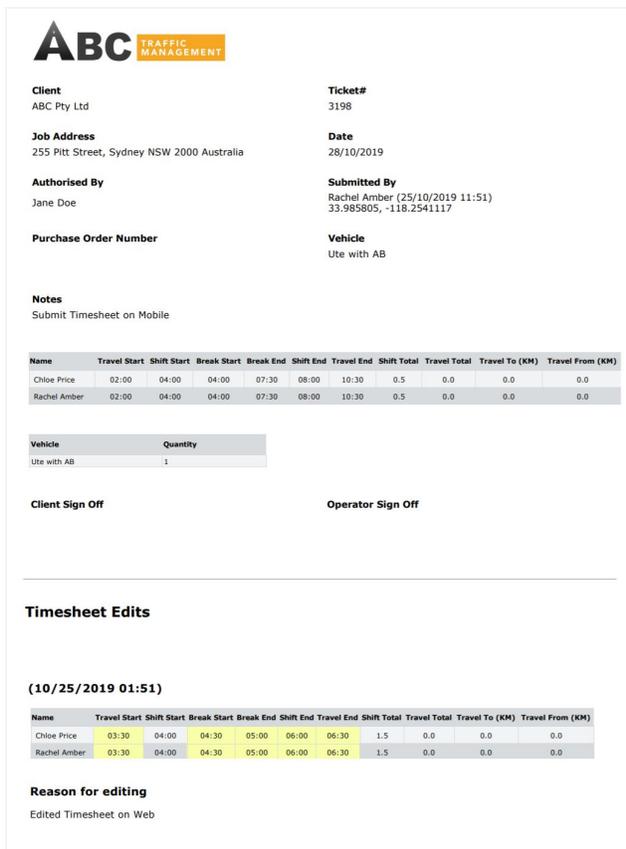


Figure 17. Timesheet PDF with cleared signatures and Timesheet Edits section

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.

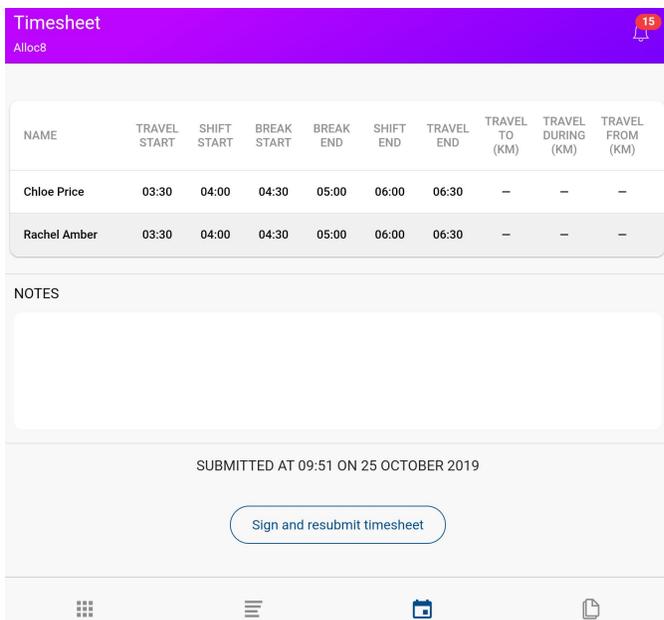
Note: Once the Timesheet Manager resubmits timesheet on mobile, the Timesheet Edits section will no longer be available on the Timesheet screen on web and Timesheet PDF.

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

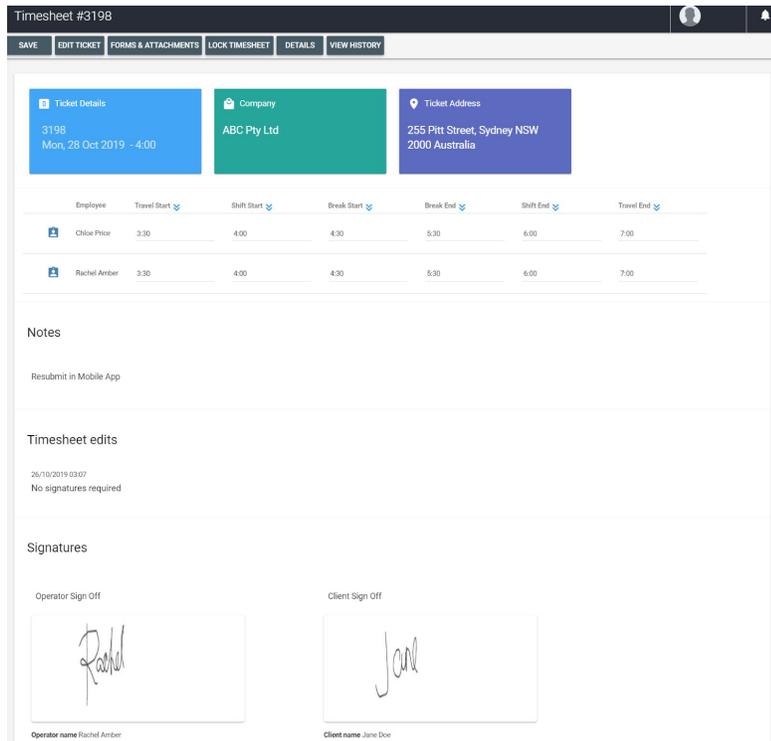
If you choose to not require signatures by selecting “No”, you will still need to provide a reason for editing the timesheet on web. This reason can be more detailed (400 characters). The original signatures done in the mobile app will be kept.

The screenshot shows a web interface for editing a timesheet. A modal dialog titled "Edit signed timesheet" is open. It contains the following elements:

- Header: "Edit signed timesheet"
- Question: "Require new signatures in the mobile app?"
- Options: "Yes" (unselected) and "No" (selected with a checkmark). A note next to "No" says: "This will keep any current signatures and attach the new changes to the original timesheet."
- Text input: "Reason:" with the text "No signatures required" entered. A character count below the input shows "378 characters remaining".
- Buttons: "CANCEL" and "SUBMIT TIMESHEET".

In the background, the "Ticket Details" for ticket #3198 on Mon, 28 Oct 2019 - 4:00 is visible. It lists employees Chloe Price and Rachel Amber, both with a travel start time of 3:30. The background also shows a table with "Shift End" and "Travel End" columns, with values 6:00 and 7:00.

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



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



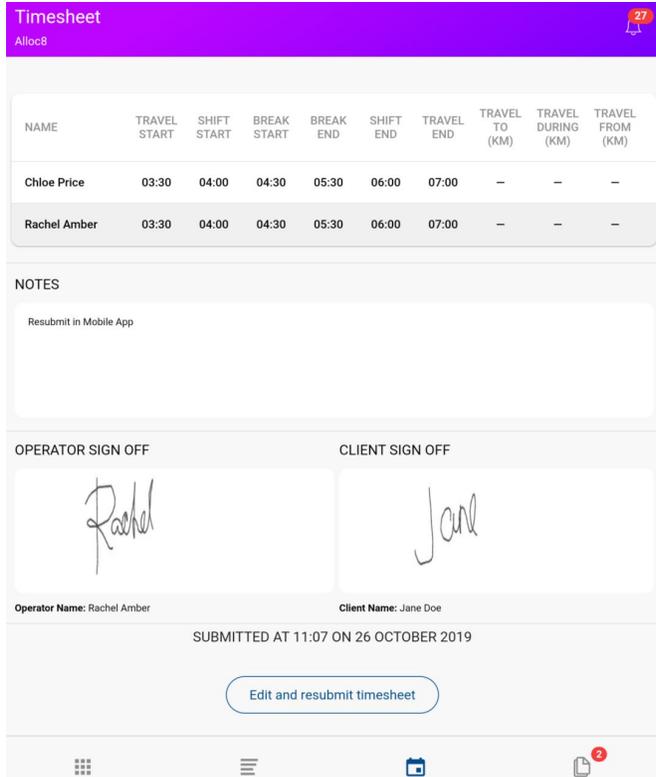
The client and operator signatures on the Timesheet PDF will remain and the amended times and reason for change are added on the Timesheet Edits section underneath the original timesheet. The updated times are highlighted in yellow. A copy of the updated Timesheet PDF is emailed to the job's Site Contact.

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