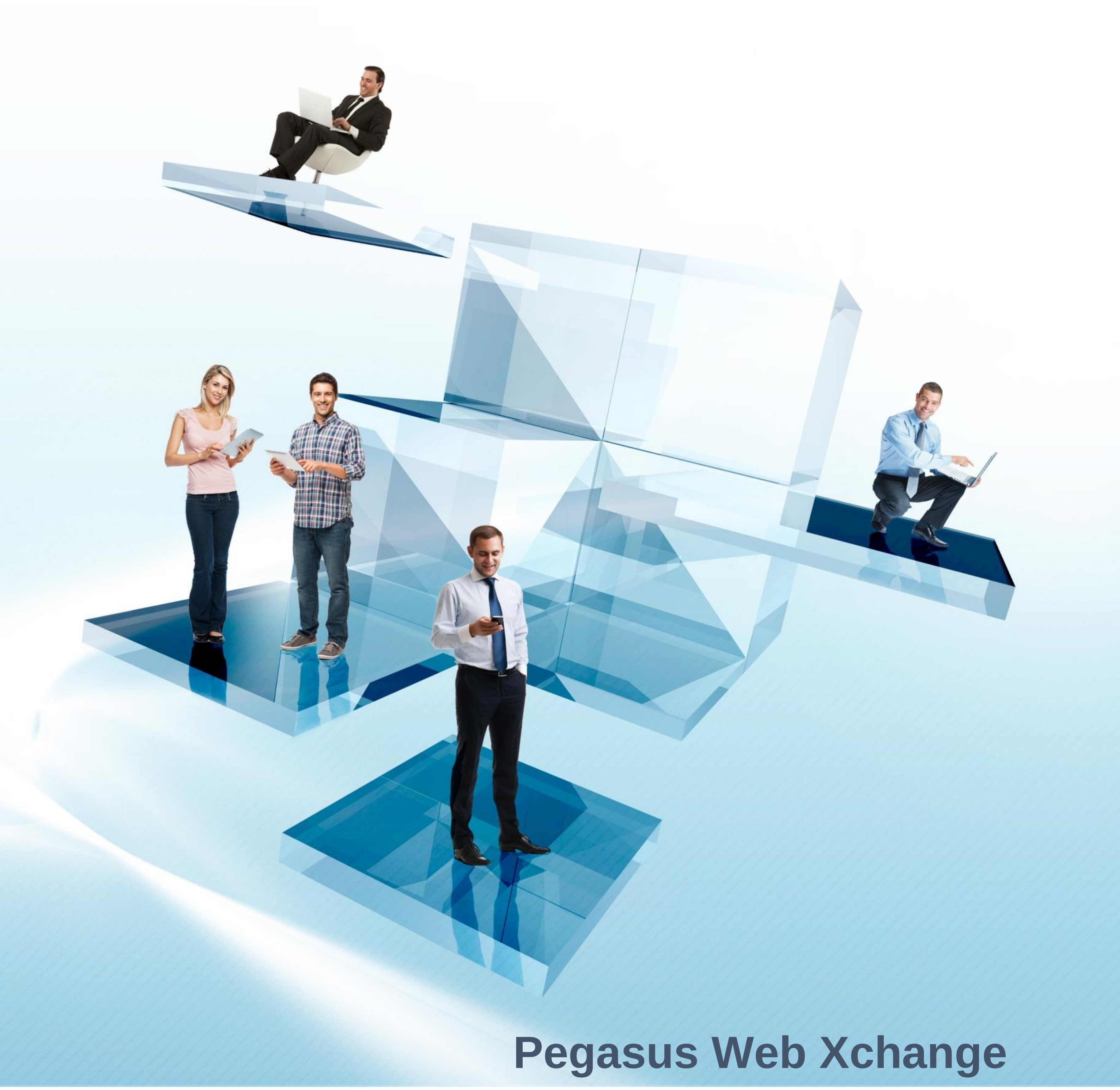

Pegasus Web Xchange

Timesheets - User Guide

Pegasus Web Xchange
Version 1.17
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Table of Contents

Signing In

• Open the Pegasus Web Xchange web site (the link is included in the welcome email sent by your administrator).

• Enter your user name and password.

• Select **Sign in**.

Sign in name

When your administrator creates your user account you will be sent an email invitation to join the service. Your user name will be included in that email. The user name is usually a combination of your first name and your surname (without a space).

> **Tip:** If you are unsure please check your welcome email that you received from your administrator. If you don't have access to the email or you think that your user name has been set up differently, contact your administrator for confirmation.

> **Note**: If you forget your password you can request that it is reset. Your reset password will be sent to you by email. Select the **Forgotten Password** link, enter your user name and select **Reset**. Then check your email inbox.

Signing Out

On the header bar select **Sign Out**.

Searching

You can enter all or part of the following in your searches:

- a name or reference of a user
- the name of a department
- the name of a project
- the name of a task type
- the name of a Worker.

> **Examples:**
>
> To search for a user called 'John Smith':
>
> - 'John' would find anyone with that name - even if it's not the first name
> - 'John S' would find anyone with that name, followed by another name starting with 'S'
> - 'John Smith' would find anyone with that name (even if 'Smith' was the first part of a longer name, like 'Smithson'.
>
> **But:**
>
> - 'Smith John' wouldn't find the user because, even though the names are the same, the names are recorded in a different sequence.
>
> To search for a user reference that included '100':
>
> - '100' would find any users whose reference was '100'
> - '100' would also find users whose reference started with '100'
> - '100' would also find users whose reference included '100' anywhere.

Workers

Timesheets Entry

The **Timesheet details** page is where you enter your time. Timesheet details include a task, shift, and time. After entering the details your Timesheet Manager will check the timesheet and either approve it for payment, or reject it. Timesheets can be submitted as soon as the details have been entered, or they can be saved as a draft to be submitted later.

For help with changing timesheets that have been rejected by your Timesheets Manager, see the Changing rejected timesheets Help topic.

Steps

1. Sign in to Pegasus Web Xchange.
2. On the **Timesheets** page, select the **Timesheet entry** button.
3. On the **Timesheets details** page, select the Add link.
4. On the **Add activity** screen, add your tasks, shift and hours. An optional comment can also be entered. Select the Add activity button to add the line.
5. To close the **Add activity** screen, select the Collapse button.
6. Select either:
    - **Submit** to save the timesheet and submit it for approval.
    - **Draft** to save the entries without submitting them. The entries will be shown when you next open the **Timesheets details** page.

Tip: Select the button to delete a line.

Tip: Select the button to pin the task to the grid. Pinned tasks will remain in the grid each time you enter a new timesheet. Select the button again to remove it from the grid.

View Timesheets

The **View timesheets** page is where you can view your timesheets and their status. Detailed or summary views are available. You can also amend and resubmit rejected timesheets, or delete a timesheet, depending on its status.

Steps

1. Sign in to Pegasus Web Xchange.
2. On the **Timesheets** page, select the **View timesheets** button.
3. To view the timesheets details, select the button. Any notes that were added by the Project Manager when either approving or rejecting the timesheet will be shown on the view.
4. To view the summary page, select the button.

Tip: Select the button to edit, or the button to delete.

Note: Only timesheets activities with a status 'Pending Worker Submit' or 'Pending Worker Resubmit' can be edited or deleted.

Your Preferences

Use the **Your preferences** page to set your first day in the working week. The day that you select will be shown first when you enter timesheet details.

Steps

1. Sign in to Pegasus Web Xchange.
2. On the **Your Timesheets section** page, select the **Your preferences** button.
3. Select your **First timesheet day**.
4. Select the **Save** button.

Timesheet Managers

Manage Timesheets

Timesheets Managers are responsible for checking Workers' timesheets, and either approving them for payment, or rejecting them so amendments can be made.

An approved timesheet for an employee will be sent to the Pegasus Opera 3 'PWX Centre' before being imported into the Pegasus Opera 3 Payroll application. Even if the Worker is not an employee, the timesheet should still be checked and approved by the Timesheets Manager, however for these Workers the Opera 3 Payroll will not be updated.

A rejected timesheet will be returned to the Worker so that they can amend and resubmit it.

> **Tip**: In Pegasus Web Xchange, Timesheets Managers are assigned to their departments using the Departments page, which is available if signed in as a Timesheets Administrator.

Steps

1. Sign in as a Timesheets Manager.
2. On the **Timesheets** page, select the **Manage timesheets** button.
3. On the **Management** page, select the box under **Approve** or **Reject**. Add a note if required using the icon under **Notes**. Select the icon to close the note.
4. Select the **Save** button.

> **Tip:** To view the timesheet details, select the button under **View**.
>
> **Tip**: To see the workers in your departments, select the Your workers link.

> **Note:** If a timesheet is rejected the Worker will need to make the necessary changes and resubmit it to the Timesheets Manager for approval.

Workers

Timesheets Managers can view a list of their Workers, along with their department and company name.

If a Worker doesn't have a draft timesheet in Pegasus Web Xchange they can also set their next timesheet start date.

Steps

1. Sign in as a Timesheets Manager.
2. On the **Timesheets** page, select the **Workers** button. The list of Workers is displayed.
3. To set the first day that a Worker can enter timesheet details:
   i. Select the button.
   ii. On the **Edit** page, enter the **Next timesheet start** date.
   iii. Select the **Save** button.

Project Managers

Projects

Projects are used by Workers to post their time against. Projects include a name, notes, an option to make it an 'administrative project', and a status. When timesheets are entered the project's name is displayed for the selected tasks.

After they are created, tasks and Project Managers must be assigned to each project.

- At least one project must be created by a Project Manager
- Projects can be created from model projects
- Each project must have tasks assigned to it
- Each Worker must be assigned to the relevant tasks to record their time against.

Steps

1. Sign in as a Project Manager.
2. On the **Timesheets** page, select the **Projects** button.
3. On the **Projects** page, select the Add link and enter the name and any notes applicable to the project.

   i. Select the **Administrative Project** box to allow Workers to post time to the project without being assigned to it.

   ii. Choose a model project to base the new project on. The new project will automatically include all the tasks set up for the model project.

   iii. Select the **Save** button.
4. On the **Assign manager** page, select the select the **Add** link to assign each Project Manager to the project.
5. Select the **Done** button.

Tip: Select the button to edit, or the button to delete.

Adding Tasks and Assigning Workers

Tasks must be added to projects before they can be used on timesheets. Workers must also be assigned to the tasks for each project before they can enter time for that task/project. When a Worker adds their time to a timesheet they will be able to choose the tasks for their projects.

There are two 'Worker groups' that can be assigned to tasks: 'Everyone' (all Workers) and 'Employees only' (excludes users who are not linked to employees in the Pegasus Opera 3 Payroll application).

Steps (to add tasks to a project and assign Workers to tasks)

1. Sign in as a Project Manager.
2. On the **Timesheets** page, select the **Projects** button.
3. To add tasks to a project:

    i. Select the button under **Edit**.

    ii. On the **Project details** page, select the **Task management** link.

    iii. On the **Task management** page, select the **Add task** link to create a task, and enter the name and notes, and select the relevant task type. Select the **Save** button.

To assign Workers to tasks:

    i. On the **Task Management** page, select the button under **Workers**.

    ii. On the **Assign worker** page, under **Available workers**, select the **Add** link to assign the Worker to the task.

    iii. Select the **Done** button.

Steps (to assign Workers to existing tasks)

1. Sign in as a Project Manager.
2. On the **Timesheets** page, select the **Projects** button.
3. On the **Projects** page, select the button under **Edit**.
4. On the **Project details** page, select the **Task management** link.
5. On the **Task management** page, select the button under **Workers**.
6. On the **Assign worker** page, under **Available workers**, select the **Add** link to assign the Worker to the task.
7. Select the **Done** button.

Note: To create several tasks, select the **Multiple task creation** link.

Tip: Select 'Everyone' to assign all Workers to a task, or 'Employees only' to assign it only to Workers who are paid from the Pegasus Opera 3 Payroll application.