



USER GUIDE



APS Web Cloud Timesheets

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What's new

March 2021

Platform upgrades to the backend/calendar controls.

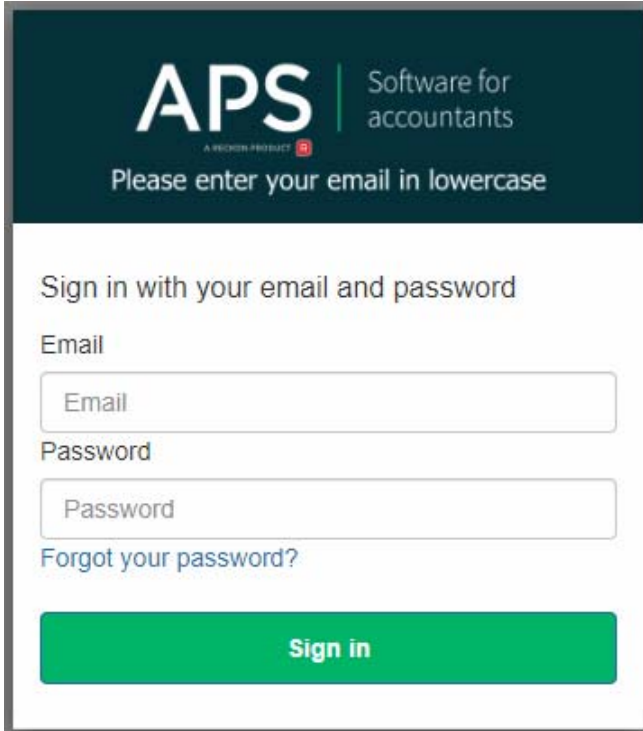
Improvements to matter searching.

Internal Matters – 'milestone required' will be enforced if the internal matter has milestones.

Web Timesheets

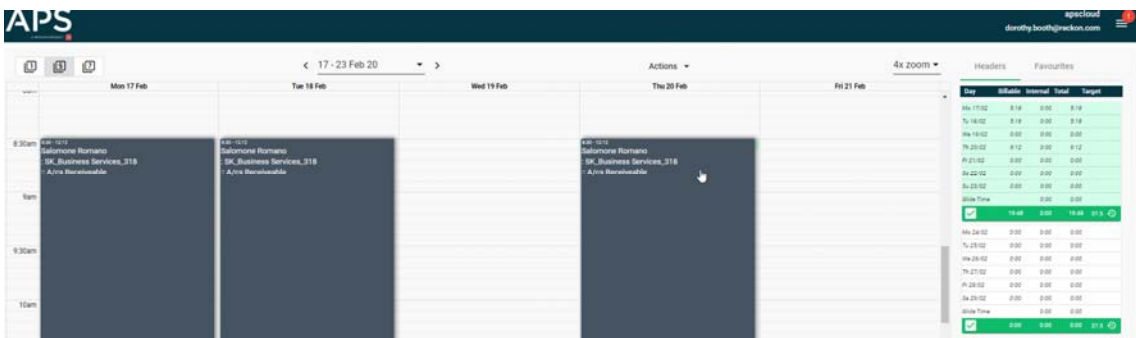
Web timesheets can be accessed via the URL: <http://timesheets.aps.reckon.com>

You will automatically be requested to login. Please use your username and password.



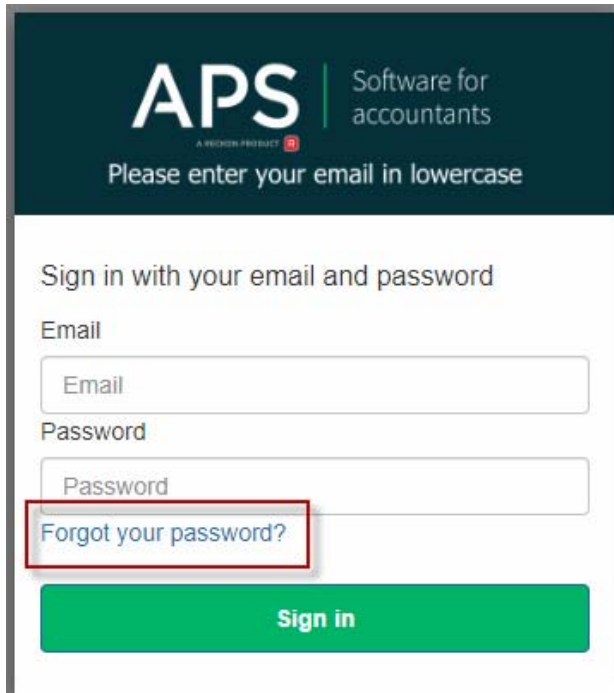
Web Timesheets looks similar to the desktop diary style timesheet.

Each row in the grid represents 1 unit of time (when zoom is set to “4x zoom”) for the logged in User.



Forgot your password?

Click on 'Forgot your password'



The screenshot shows the APS login interface. At the top, the APS logo is displayed with the tagline 'Software for accountants' and 'A RECKON PRODUCT'. Below the logo, a dark green banner contains the text 'Please enter your email in lowercase'. The main content area is white and features the heading 'Sign in with your email and password'. There are two input fields: 'Email' and 'Password'. A red rectangular box highlights the 'Forgot your password?' link located below the password field. At the bottom of the form is a green button labeled 'Sign in'.

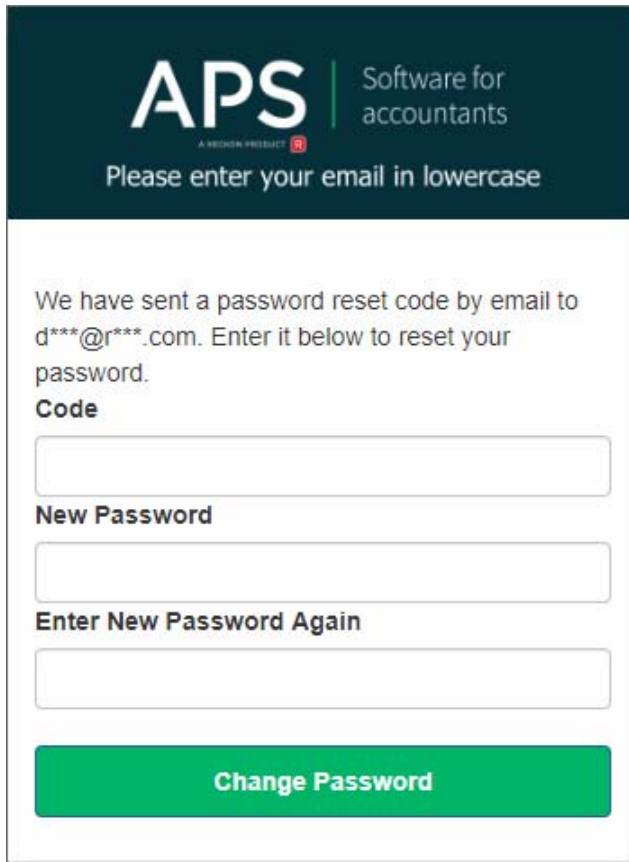
Enter your email address, then click on the Reset my password button.



The screenshot shows the 'Forgot your password?' page. At the top, the APS logo is displayed with the tagline 'Software for accountants' and 'A RECKON PRODUCT'. Below the logo, a dark green banner contains the text 'Please enter your email in lowercase'. The main content area is white and features the heading 'Forgot your password?'. Below the heading is the instruction 'Enter your Email below and we will send a message to reset your password'. There is a single input field labeled 'Email'. At the bottom of the form is a green button labeled 'Reset my password'.

A password reset code will be sent to your email address.

Use this code and enter your new password as per below, click change password.

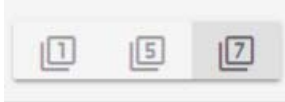


The screenshot shows a password reset form for APS. At the top, the APS logo is displayed with the tagline 'Software for accountants'. Below the logo, a dark green banner contains the text 'Please enter your email in lowercase'. The main form area is white and contains the following elements: a message stating 'We have sent a password reset code by email to d***@r***.com. Enter it below to reset your password.', a label 'Code' above an empty text input field, a label 'New Password' above an empty text input field, a label 'Enter New Password Again' above another empty text input field, and a prominent green button labeled 'Change Password' at the bottom.

Timesheets

Calendar Views

The 1, 5 and 7 icons represent the number of days displayed in the calendar



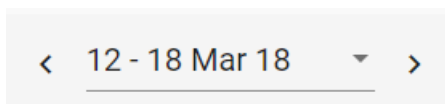
1 – Single day view (defaults to today if the current week is selected)

5 – Work Week View

7 – 7 Day week view

Header Navigation

The header navigation bar displays the current active header and allows you to navigate through the week.

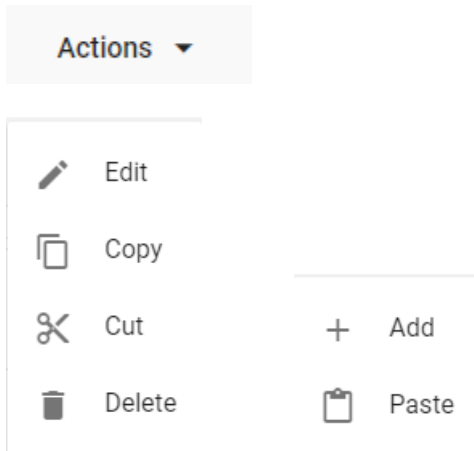


Single Day view - When in single day view the navigation arrows left and right will navigate you through the days, when you navigate past the beginning or end of a header then the active header will be updated

5 or 7 day view – When in 5 or 7 day view the navigation arrows left and right will navigate you through the headers

Actions Menu

The Actions menu is context sensitive and provides the following functions



Edit – opens an existing entry for editing

Add – adds a new entry at the selected time, if more than 1 unit is selected in the Calendar then the number of units will be set accordingly in the new entry.

Copy – (Ctrl + C) – Copies the selected entry to the clipboard

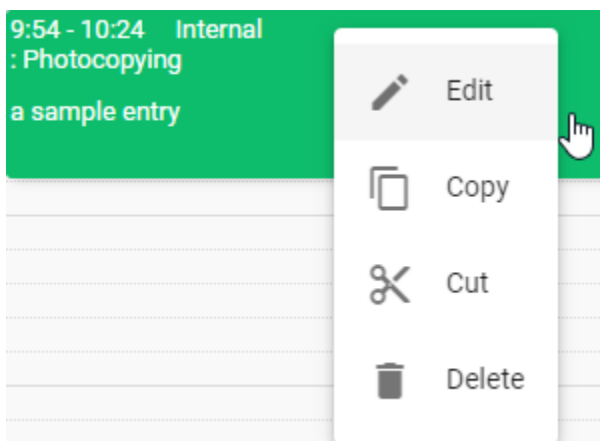
Cut – (Ctrl + X) – Places the current entry in the clipboard, then deletes the timesheet entry

Paste – (Ctrl + V) – Pastes the Copied/Cut entry to the newly selected time. If more than one unit is selected when pasting, then the duration will be set to the number of units selected in the calendar

Delete – (Delete key) – deletes the selected Entry

Actions Menu – via Mouse

The context sensitive actions menu is also available via the right click mouse menu.



Adding an Entry

There are multiple ways to add a timesheet entry:

- Two clicks in a unit opens the add screen – one click to select the unit (slot) a 2nd click to open add screen.
- Select a range of cells (units) holding the shift key, will open the Add screen setting the duration to the number of units selected in the calendar.
- Select a unit (or units) then use the Add button from the Edit menu.

Add Entry form

When adding the Add Time Entry screen is displayed

The screenshot shows a mobile-style form titled "Time Entry - Wed 19 Feb 2020 @ 11:30 am". At the top left, there are icons for a person (Client) and a dollar sign with a slash (Internal Time). Below these are three input fields: "Client" with a checkmark icon on the right, "Matter", and "Milestone". Below these is a "Units (5 minutes)" field with the value "1". There is a "Narration" text area and a "Rate" dropdown menu currently set to "Normal Rate". At the bottom, there is a checkbox labeled "Complete Milestone?". The bottom navigation bar contains four buttons: "Cancel", "Save As Favourite", "Save Draft", and "Save".



Recent Clients – Displays a list of your recently used clients



Internal Time – Click on the Internal Time icon displays a list of Internal Matters, alternatively you can type the word 'Internal' to display the internal matters.



Changes the search behaviour to search for client name starting with text or including text.

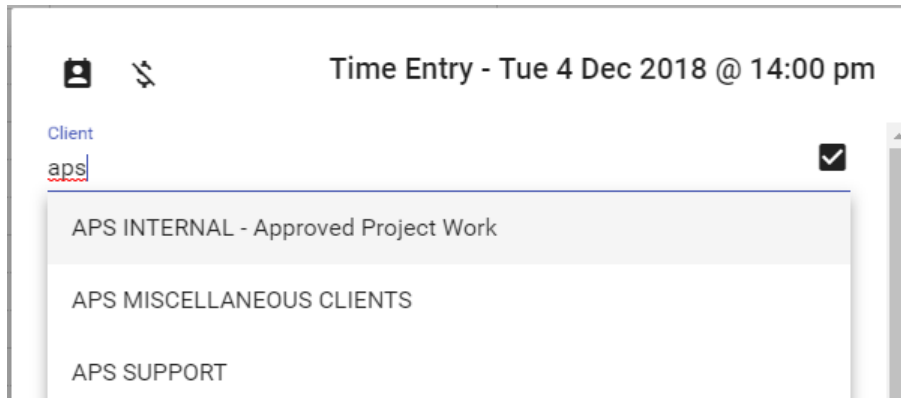
Save as Favourite – save an entry you make frequently to favourites so it can be retrieved for use again. These can be a draft or an actual entry.

Save Draft – incomplete (or placeholder) entries can be created, a minimum of 1 piece of information must be entered to allow an entry to be saved as a Draft entry. eg, Client or narration.

Client Name Search

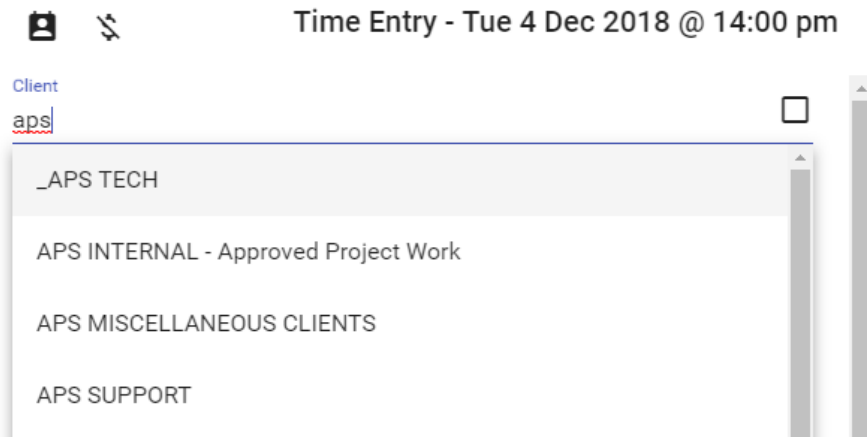
Names commencing with (tick box ticked):

Searching for APS where the name begins with APS will return clients whose names commence with APS as per the example below:



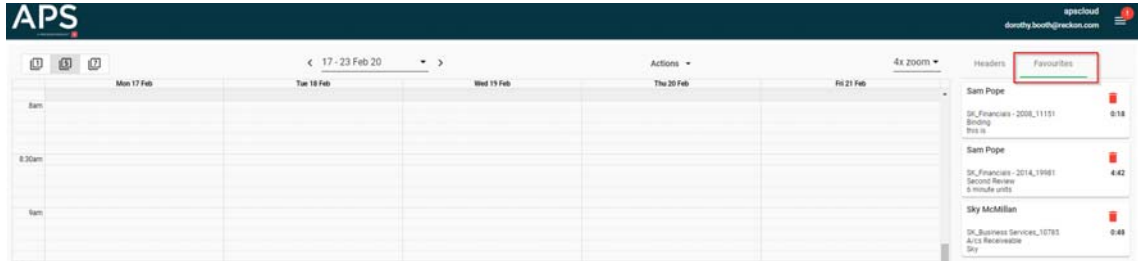
Names containing (tick box un-ticked):

Searching for APS where the name contains APS will return clients whose names contain the text APS as per the example below:



Favourites

Favourites are designed for easy creation of entries that are frequently used. Both Complete and Draft entries can be added to favourites then added to your day. The Favourites tab will display entries previously saved as Favourites. These entries can be dragged onto the calendar onto the desired start time and the entry will be automatically saved to that day.



Creating a Favourite

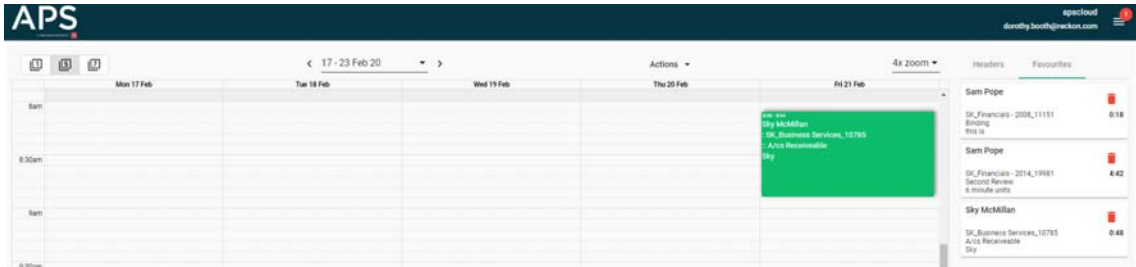
In the Timesheet Add Entry screen, enter the details you wish to save, this can be either a complete entry or a draft entry.

A screenshot of the 'Time Entry - Wed 26 Feb 2020 @ 15:54 pm' form. The form has a title bar with a calendar icon and a clock icon. Below the title bar are several input fields: 'Client' with a checkmark icon, 'Matter', 'Milestone', 'Units (6 minutes)' with the value '1', and 'Narration' with the text 'Sample draft entry'. Below these fields is a 'Rate' dropdown menu set to 'Normal Rate'. At the bottom of the form is a checkbox labeled 'Complete Milestone?'. At the very bottom are four buttons: 'Cancel', 'Save As Favourite' (highlighted with a red box), 'Save Draft', and 'Save'.

The draft entry will be saved to Favourites.

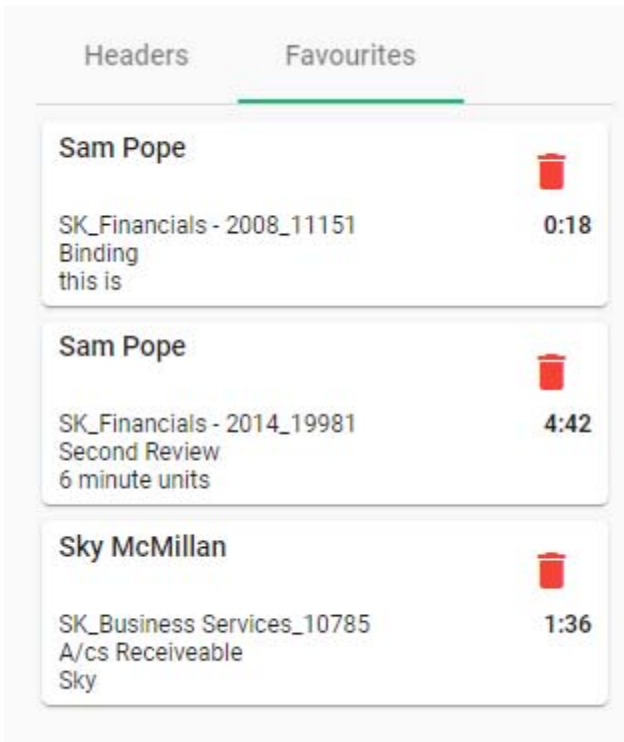
Using a Favourite

To add a Favourite to your timesheet, drag and drop the selected favourite to the day and time you want the entry created.



Deleting a saved Favourite

A saved favourite can be deleted using the rubbish icon.




Week Summary

Completing your Week

To complete the timesheet week, open the headers view and select the Tick, this will complete the week (a pencil will indicate the week is complete). To Activate a Completed week, select the Edit pencil to re-activate the week.



Recalculate week totals

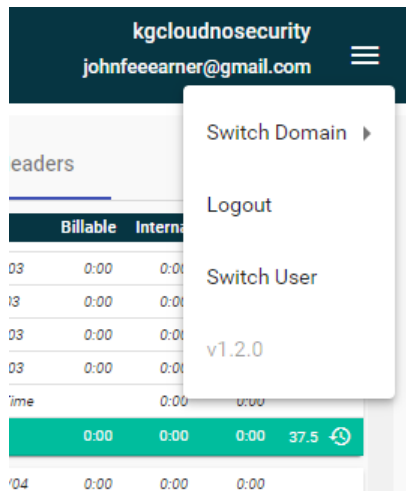
The refresh clock icon () provides a function to recalculate the week totals should this be required.

Open others Timesheet

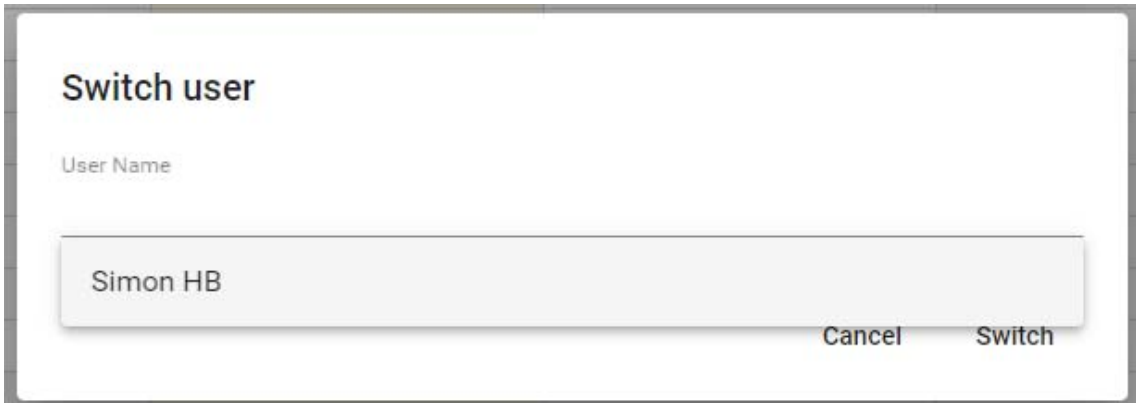
This allows users to edit others timesheet.

Switch Users:

Login to Web timesheet and hover on hamburger icon at the top right and click "Switch User"




User is prompted with a pop-up window to search for a user that you like to switch too.



A pop-up window titled "Switch user" with a "User Name" label and a text input field containing "Simon HB". At the bottom right, there are two buttons: "Cancel" and "Switch".

Select User Name and click 'Switch' navigates user to different user's timesheet and a message will be displayed at top 'You are currently editing the timesheet of: User namexxx(Switch User or Go to your own)'



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You are currently editing the timesheet of: **Simon HB** (Switch User or Go to your own)

Navigation icons: [1] [5] [7] < 8 - 14 Apr 19 >

	Mon 8 Apr	Tue 9 Apr	Wed 10 Apr	
10:30am				
11am				
11:30am				
12pm				
12:30pm				

There is ability for the user to go back to their own timesheet or to switch to a different user by clicking 'Switch User' or 'Go to your own' link displayed at top.

Glide Time Entry

When a Practice is set up to keep track of extra time worked outside of normal hours, this allows users to record and calculate extra hours worked or time taken from the Glide Time repository. The user can use their timesheet as a self-balancing control of their personal time worked.

When the total hours worked for the week have been entered the week header form is used to calculate the Glide Time accrued or used for that week.

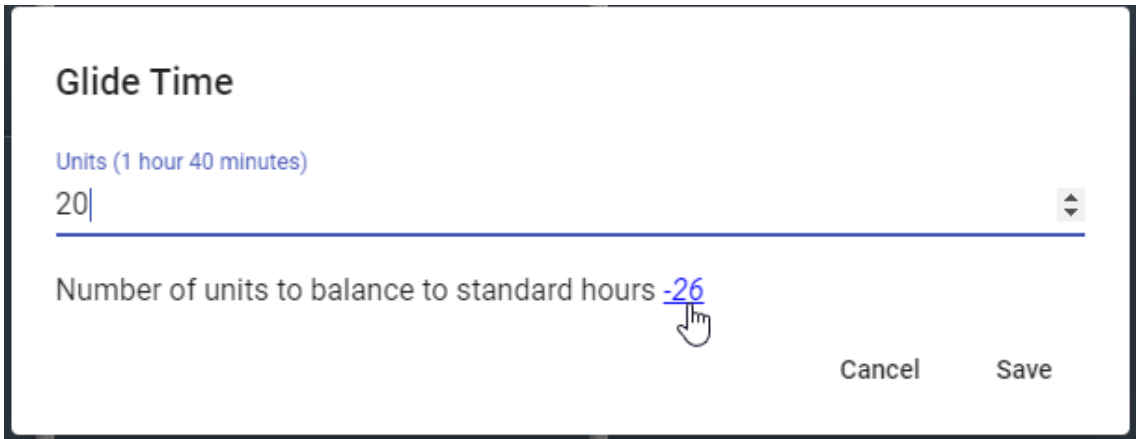
Login to Web Timesheets and select a header where glide time is relevant.

Mo 25/03	10:00	0:00	10:00
Tu 26/03	10:00	0:00	10:00
We 27/03	10:00	0:00	10:00
Th 28/03	10:00	0:00	10:00
Fr 29/03	10:00	0:00	10:00
Sa 30/03	0:00	0:00	0:00
Su 31/03	0:00	0:00	0:00
Glide Time		0:00	0:00
<input checked="" type="checkbox"/>	50:00	0:00	50:00 37.5 ↻

Glide Time is the variance between actual and standard hours for the week. It is manually calculated for each week.

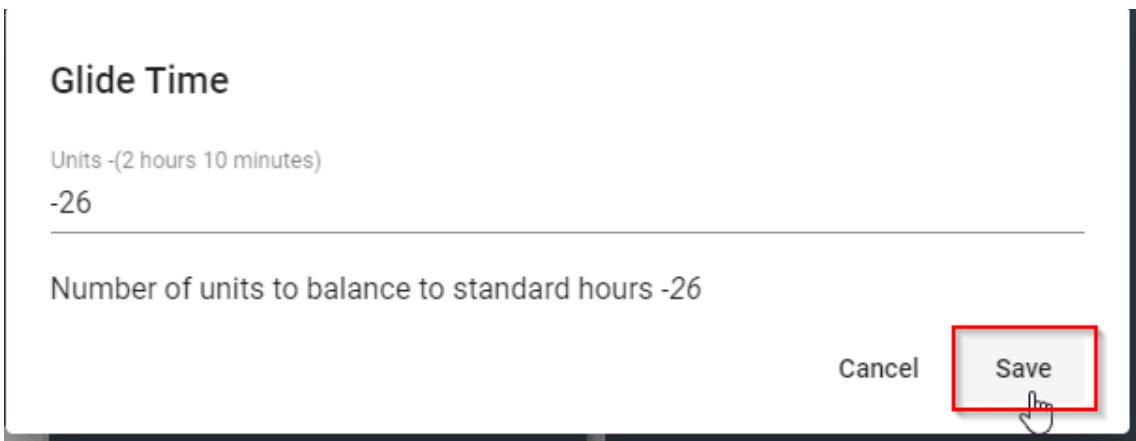
Headers		Favorites		
Day	Billable	Internal	Total	Target
Mo 03/02	0:00	3:40	3:40	
Tu 04/02	4:10	3:00	7:10	
We 05/02	10:00	0:00	10:00	
Th 06/02	0:00	7:30	7:30	
Fr 07/02	0:00	7:30	7:30	
Sa 08/02	0:00	0:00	0:00	
Su 09/02	0:00	0:00	0:00	
Glide Time		0:00	0:00	
<input checked="" type="checkbox"/>	14:10	21:40	35:50	37.5 ↻

Users must manually enter hours by (single) clicking on the Internal hrs of the Glide Time row. This will display a Glide Time pop-up where changes can be made.



The difference between the entered hours and the standard hours worked per week will be calculated and displayed in the message.

Click on this calculated number to select it OR edit the number of units.



Click save after changes.

Once calculated the glide time hours will show as Internal hrs in the Glide Time row.

- Extra/accrued hours worked are displayed in red and in brackets.
- Used/deficit hours worked displayed in black.

Note: in Glide Time – Extra time worked is shown as negative units. Used time is shown as positive units.