

Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	1 of 6

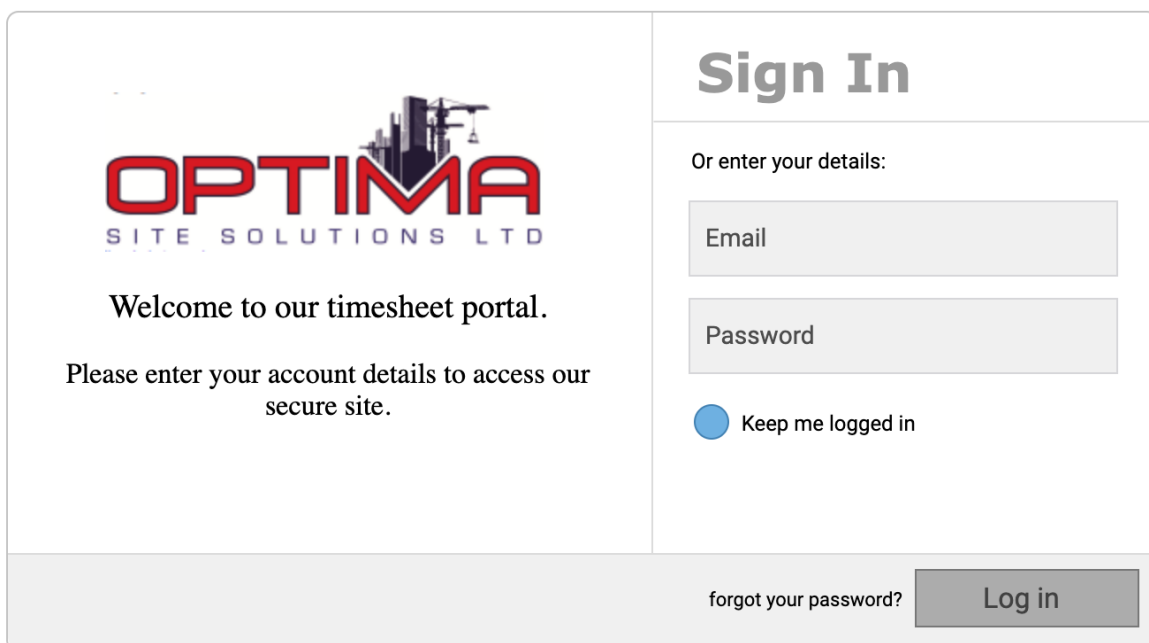
Video guidance can be viewed at the following link.


For any help, please email: timesheets@optimasitesolutions.com

This guide outlines the process of clients approving contractor timesheets for Optima Site Solutions Ltd on our new platform, Timesheet Portal.

Logging into the Portal

URL: <https://optimasitesolutions.timesheetportal.com/>





Welcome to our timesheet portal.

Please enter your account details to access our secure site.

Sign In

Or enter your details:

Keep me logged in

[forgot your password?](#)

Log into the portal using the unique credentials provided. When you first log in, you will be asked to change your password. Set a memorable password. If you forget your password at any point, please contact Optima Site Solutions Ltd on 0208 783 9222 or email timesheets@optimasitesolutions.com.

The Process

If your company required a contractor to submit a timesheet, the contractor will log into their unique portal and submit the hours entered that they have worked for the past week. You will then get an email stating the timesheet has been submitted. You can either log into the portal to review the timesheets or accept / reject the timesheets by email (contact Optima Site Solutions Ltd if you want the email option enabled).

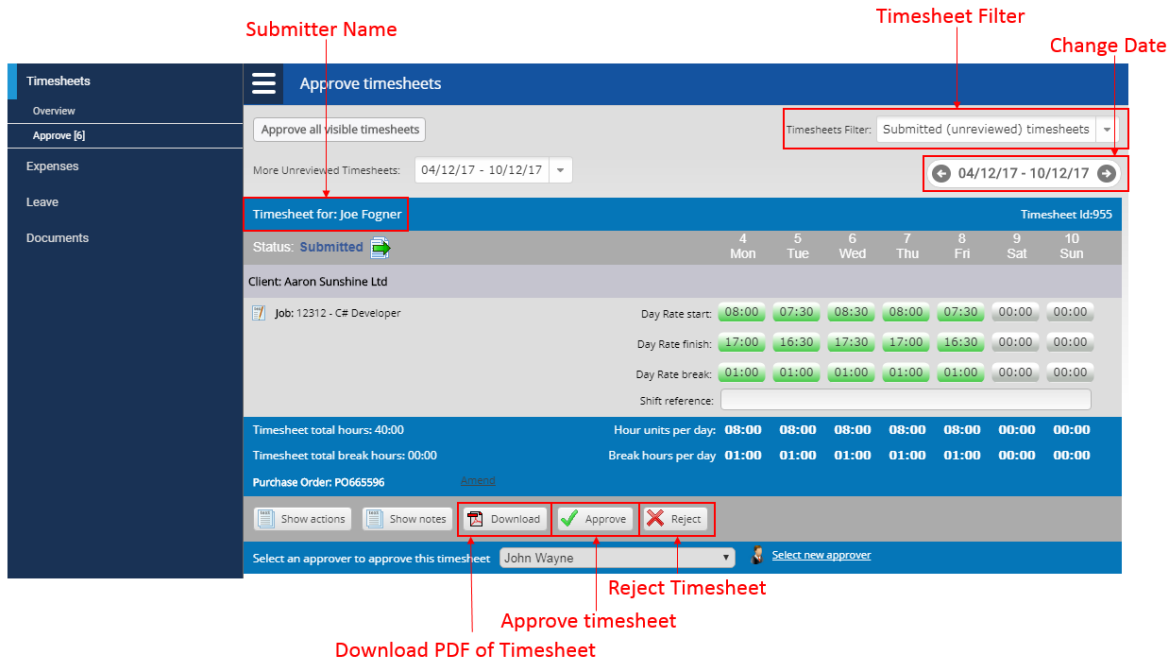
If your company does not require a contractor to submit a timesheet and you log all hours on behalf of the contractor and approve them.

The Dashboard

When opening your dashboard, you will be automatically to the page where you can approve timesheets. If you are redirected to the dashboard page, you can click on *Approve Timesheets* in the *Timesheets* section to view timesheets available for approving.

Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	2 of 6

If there are timesheets requiring approval, you will see a screen similar to the following screenshot:



The hours for contractors hours are shown in the right hand area each timesheet. If you have more than one timesheet to review for the same week, they will be shown stacked on the same page. When approving, ensure the time submitted by the contractor is correct.

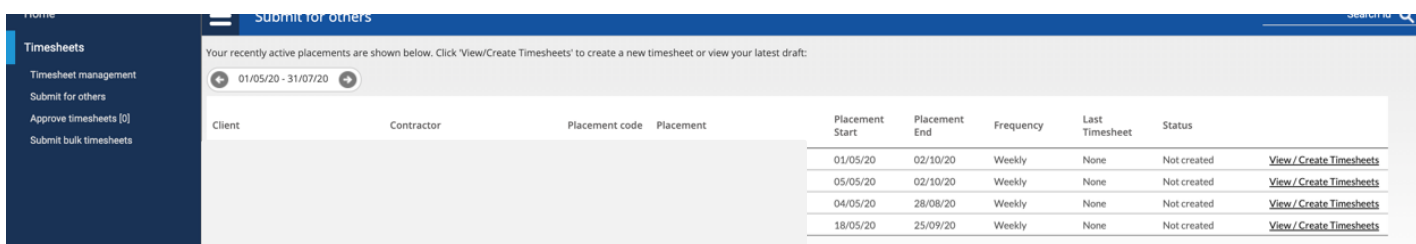
To move between different weeks, use the grey navigation arrows above the timesheet. You cannot see timesheets for multiple weeks at once; you must move between different weeks to view other timesheets.

Submit Timesheets on behalf of Contractors

To submit time on behalf of the contractors, you can do this two ways.

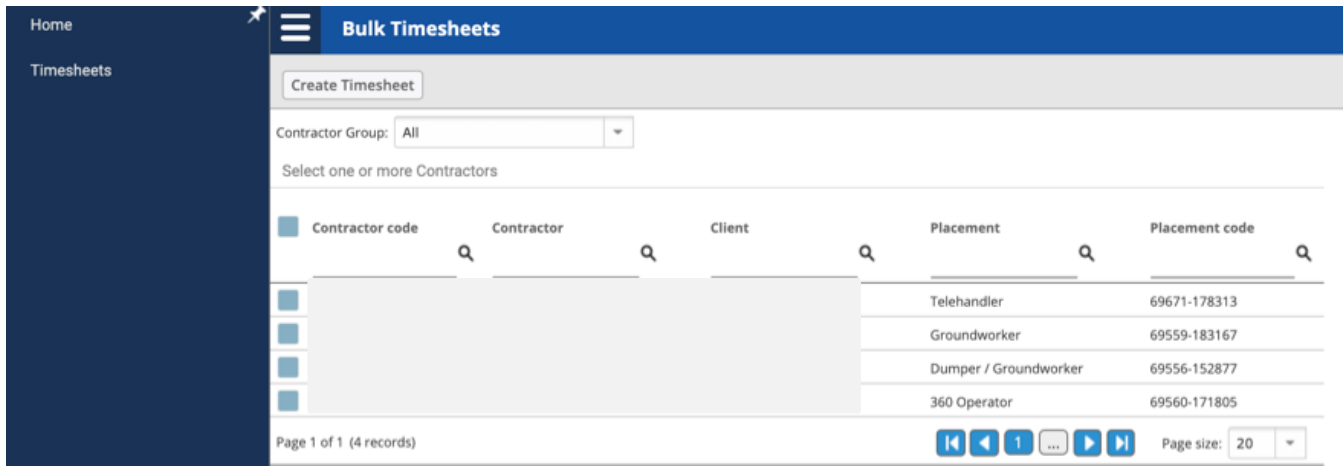
1) Individually

This is done through the *Submit for others* tab. This will list all of the contractors that you have linked to you for approval. Click on *View / Create Timesheets* button and enter the time. Once entered the time, click *Submit*. Once submitted, please go into the approval tab (from the left hand menu) and approve all timesheets.



Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	3 of 6

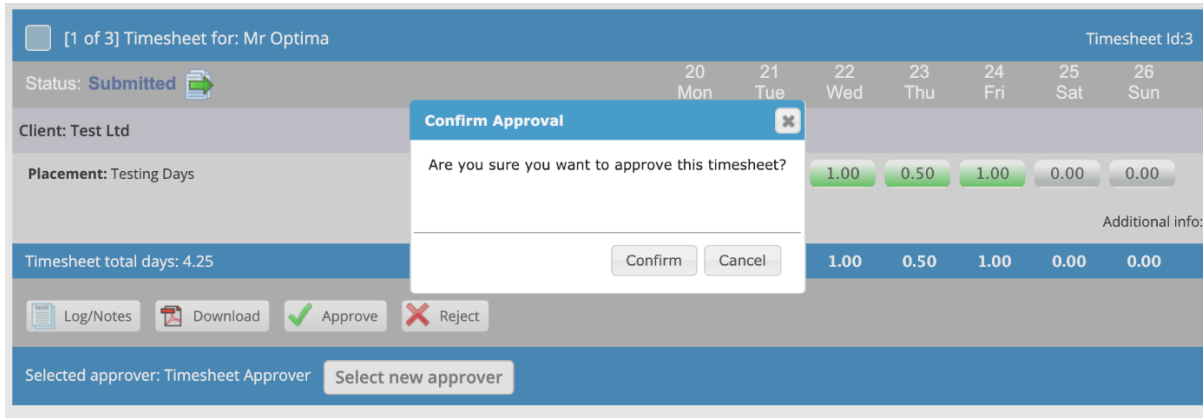
- 2) As a group timesheet
 Click *Submit bulk timesheets* from the left hand menu. This will show all the contracts that you are assigned as an approver for. Click the *check box* (next to Contractor code) to select all contractors and then Click *Create Timesheet* (at the top of the page). This generate all the timesheet for submission. Enter the hours and hit *submit*. Once submitted, please go into the approval tab (from the left hand menu) and approve all timesheets



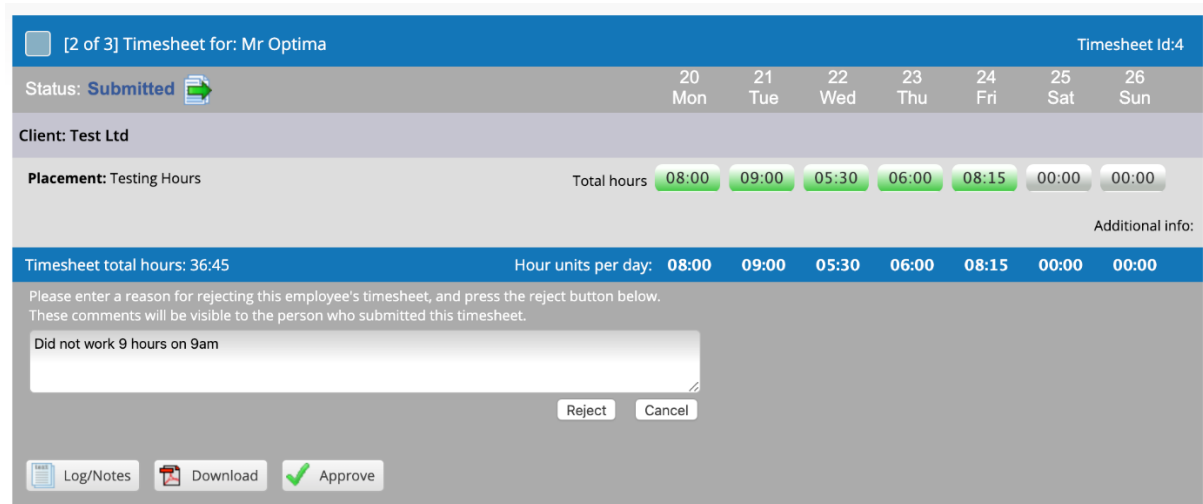

Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	4 of 6

Approve / Reject Timesheets

To approve a timesheet, click on the *Approve* button. When you approve the timesheet, you will be asked to confirm your approval, as shown in the screenshot below.



To reject a timesheet, click on the *Reject* button. You will need to enter a reason for rejecting the timesheet, after which you can click *Reject* again.



After rejection or approval, the contractor will receive an email to inform them of your action. If you have rejected the timesheets, the contractor will be able to see the comments you have made. Once the issue has been resolved, you can approve a timesheet after it has been rejected.

View timesheet notes / history

To view the timesheet notes, click on the *Show Notes* button in the buttons section at the bottom of the timesheet. This will display any notes added to the timesheet.

To view the history of the timesheet, (e.g. time of submission), click the *Show Actions* button in the buttons section at the bottom of the timesheet.

Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	5 of 6

Approve multiple timesheets

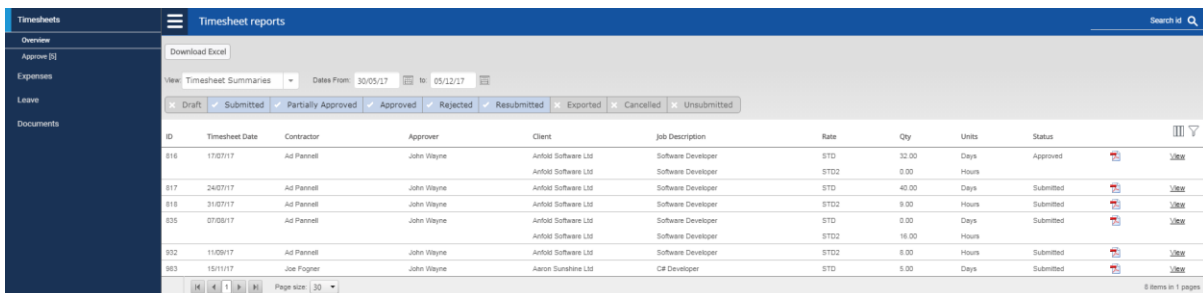
To approve multiple timesheets at once, tick the checkbox on the left of each timesheet, and then click on *Approve Selected Timesheets* at the top of the timesheets list. You can also select to approve all visible timesheets by clicking *Approve all visible timesheet*. This will approve all open timesheet that you on your portal that given time.



Timesheet Management

Timesheet Portal allows you view all timesheets for any Contractors who are assigned to one or more of the Jobs you are responsible for approving. To view the timesheets, click on the *Timesheet Management* button in the left hand menu.

The Timesheet Management screen will show you a list of timesheets for all contractors that have timesheets for jobs within your organisation:



The timesheet management screen will show you a list of timesheets for all contractors that have jobs within your organisation. The date range boxes allow you to filter out timesheets by the timesheet week start date. The status filter boxes allow you to filter out timesheets according to their status, e.g. if you wanted to see only rejected timesheets, you would only select the *Rejected* status box.

To view an individual timesheet, click on the *View* button on the right of the timesheet. To return to the summaries page, click on the back arrow. To create a downloadable PDF timesheet, similar to the on-screen version, click on the PDF icon on the right hand side of the page.

Issue	1	Timesheet Portal: Client Guide	Doc	TSP04
Date	June 2020		Pages	6 of 6

Daily Entries View

To see the individual entries for a timesheet for each day in timesheet management, change the *view* dropdown on the top of the page to *Daily Entries Per Timesheet*. You can then download an Excel file directly from the timesheet management page by clicking on *Download Excel* in the top of your screen.

Weekly Totals View

To view weekly totals for each job and respective rate worked, change the *Timesheets View* dropdown to *Timesheet Summaries*