

Issue	1	Timesheet Portal: Contractor Submission Guide	Doc	TSP03
Date	June 2020		Pages	1 of 5

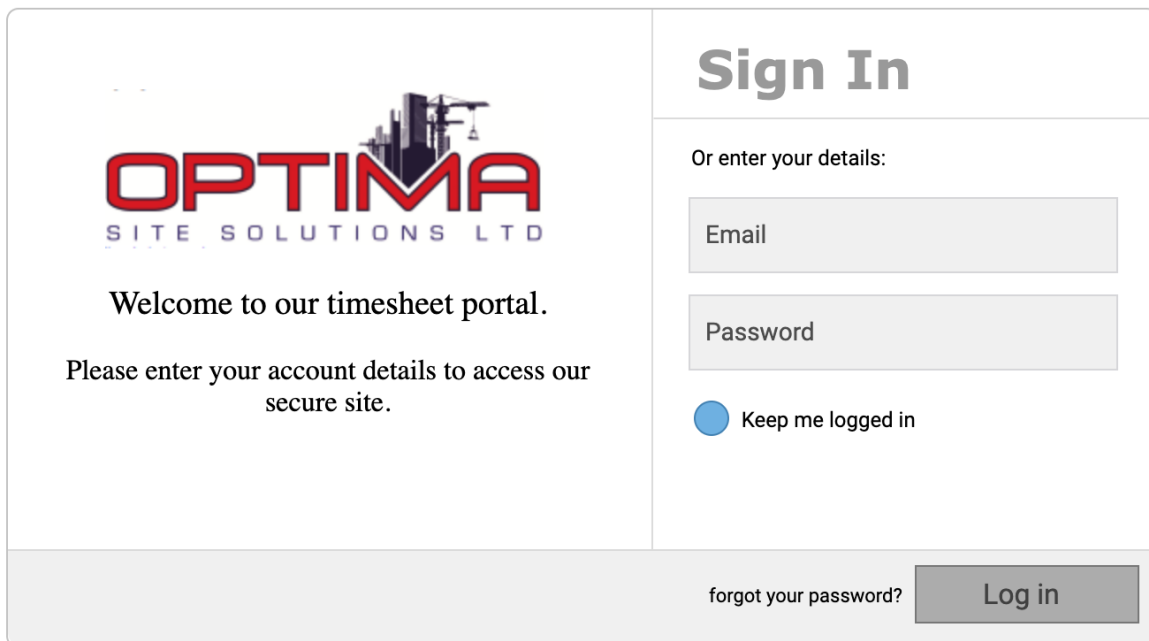
Video guidance can be viewed at the following link.

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

This guide outlines the process of contractors submitting timesheets to a client through Optima Site Solutions Ltd new platform, Timesheet Portal.

Logging into your Portal

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



The screenshot shows the 'Sign In' page of the Timesheet Portal. On the left, there is the Optima Site Solutions Ltd logo and a welcome message: 'Welcome to our timesheet portal. Please enter your account details to access our secure site.' On the right, there is a 'Sign In' section with the heading 'Or enter your details:'. Below this are two input fields for 'Email' and 'Password'. There is a radio button labeled 'Keep me logged in' which is currently selected. At the bottom right, there is a 'Log in' button and a link for '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 Dashboard

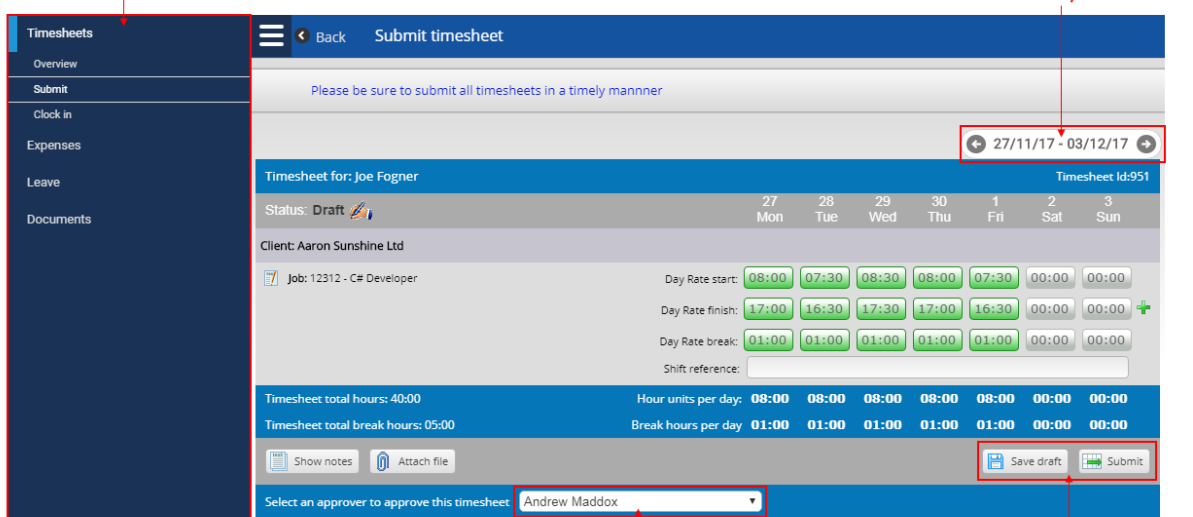
All sections in Timesheet Portal contain a left hand menu, allowing you navigate to different sections of the Timesheet Portal.

Your timesheet for the current week will be shown in the main area. You do not need to create a new timesheet for each week. All you need to do is move to the week you are interested in. To move between different weeks, use the grey date navigation arrows as shown in the top right of the screenshot below.

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Left Hand Menu

View Previous / Next Week



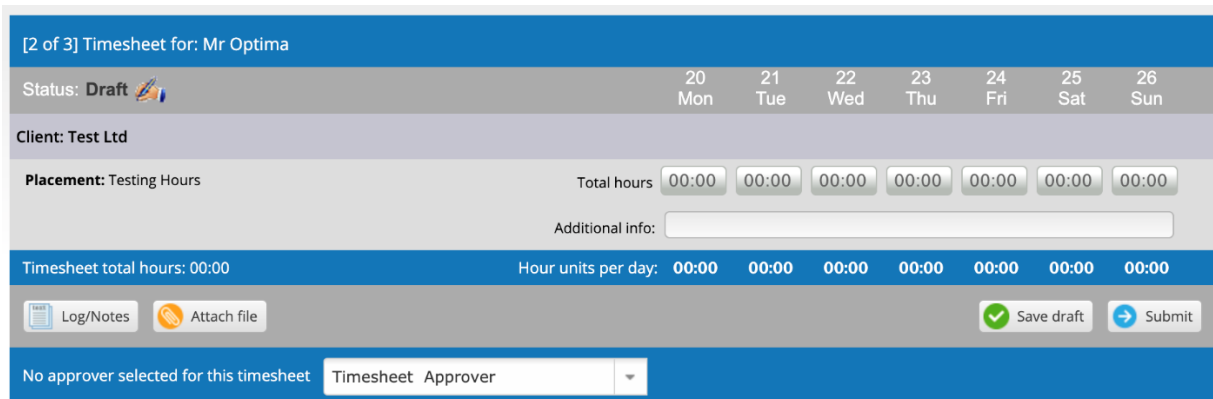
Client Approver

Save / Submit

Submitting Timesheets

Hourly Time

If you are required to enter your hours worked on-site, you should enter your time worked for each day in corresponding fields. You can enter the time in the format HHMM, HH.MM or HH:MM. For example, to enter 8 hours and 30 minutes you could type in 0830, 08.30, 08:30 or 830. The timesheet will appear like the below:



[2 of 3] Timesheet for: Mr Optima

Status: Draft

Client: Test Ltd

Placement: Testing Hours

Total hours: 00:00 00:00 00:00 00:00 00:00 00:00 00:00

Additional info:

Timesheet total hours: 00:00

Hour units per day: 00:00 00:00 00:00 00:00 00:00 00:00 00:00

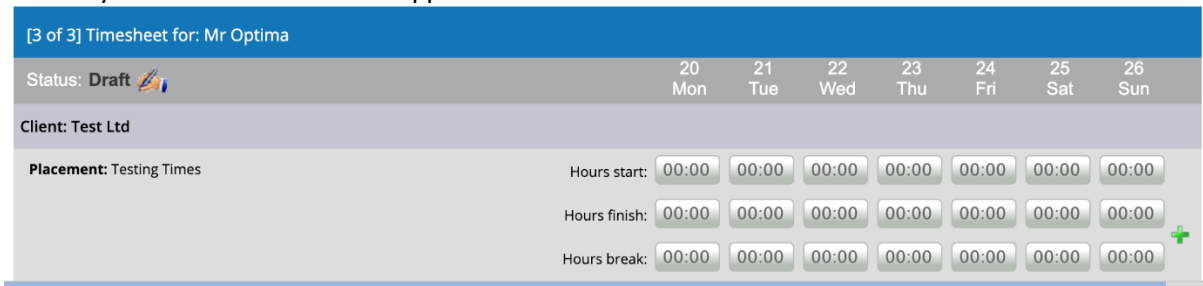
Log/Notes Attach file Save draft Submit

No approver selected for this timesheet Timesheet Approver


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Start / Finish Time

If you are required to record your start and finish time and any breaks, you should enter your start time, end time and total break time in the format HHMM (0830), HH.MM (08.30) or HH:MM (08:30). The total shown is the total hours between the start time and end time, minus the break time in the summary bar. The timesheet will appear like the below:



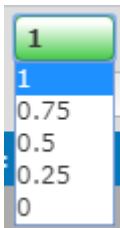
[3 of 3] Timesheet for: Mr Optima

Status: **Draft** 

	20 Mon	21 Tue	22 Wed	23 Thu	24 Fri	25 Sat	26 Sun
Client: Test Ltd							
Placement: Testing Times	Hours start: 00:00	00:00	00:00	00:00	00:00	00:00	00:00
	Hours finish: 00:00	00:00	00:00	00:00	00:00	00:00	00:00
	Hours break: 00:00	00:00	00:00	00:00	00:00	00:00	00:00

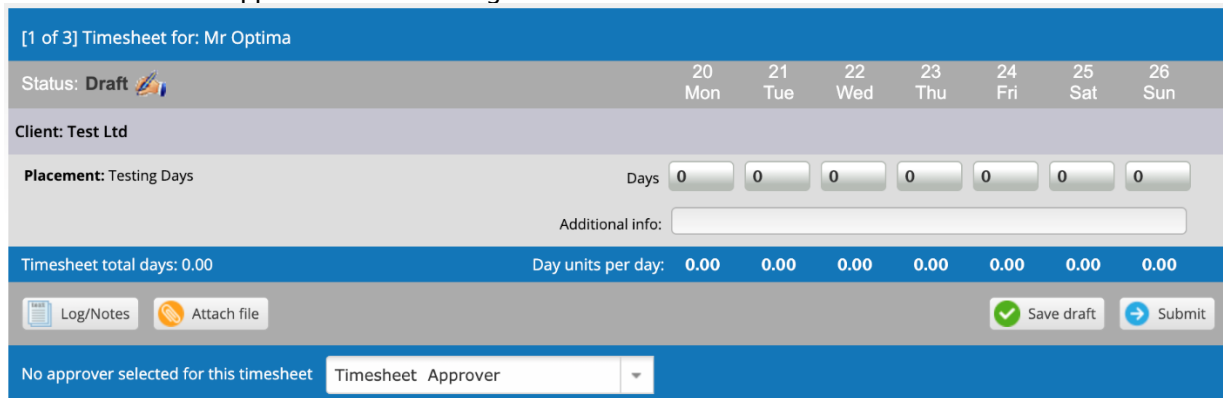
Daily Time

If you are on a day rate, you will be required to rerecord time as unit. Daily time will be seen as a drop-down list for which you choose a specific number rather than entering the value, as per the example below. Key: 1 = full day worked; 0.75 = ¾ of a day worked; 0.5 = half a day worked; 0.25 = ¼ of a day worked; 0 = not worked.








1
1
0.75
0.5
0.25
0

The timesheet will appear as the following:



[1 of 3] Timesheet for: Mr Optima

Status: **Draft** 

	20 Mon	21 Tue	22 Wed	23 Thu	24 Fri	25 Sat	26 Sun
Client: Test Ltd							
Placement: Testing Days	Days 0	0	0	0	0	0	0
	Additional info: <input type="text"/>						
Timesheet total days: 0.00	Day units per day: 0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Log/Notes	 Attach file					 Save draft	 Submit
No approver selected for this timesheet	Timesheet Approver <input type="text"/>						

Save & submit

You may save your timesheet before the submission date, so that you can enter your hours worked as you go. After saving your timesheet, your hours entered will be reloaded when you next log in. To save your timesheet, click on the *Save Draft* icon, located next to the submit button on the bottom right of the timesheet form.

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To submit your timesheet, click the submit button on the bottom of the timesheet form. If you have been assigned multiple approvers, you can select the one for which you want to approve your timesheet using the drop-down list at the bottom of the timesheet. Once you submit your timesheet, you will not be able to make any changes to it. An email will automatically be sent to your approver when you submit your timesheet, and you will receive an email when the timesheet has been reviewed.

Rejected timesheets

If your timesheet is rejected by your approver, you will receive an email and/or from Timesheet Portal. Your timesheet will also have the *Rejected* status icon and a message on top of your dashboard to state why it was rejected.



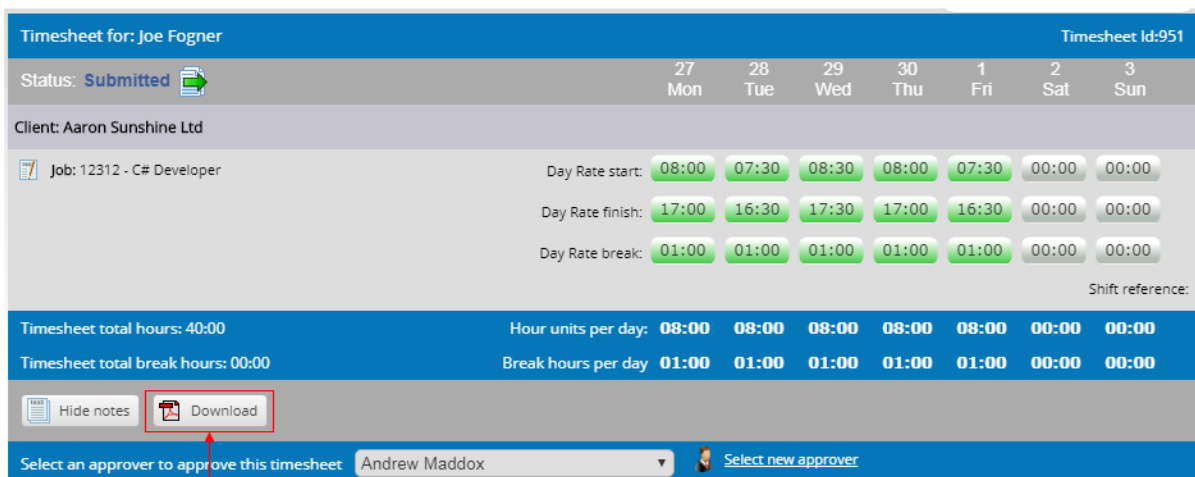
To resubmit a rejected timesheet, make your amends as if you were submitting it the first time, and click on the Submit button.

Add a daily note

To add notes relating to a specific day, click on time entry field for the day. You can enter your note by clicking in the notes box and entering your note there.

Download Timesheets

Once your timesheet has been submitted, you may download it for printing. To download a timesheet, open up the timesheet and click *Download Timesheet* icon at the bottom of the timesheet, as illustrated in the screenshot below.

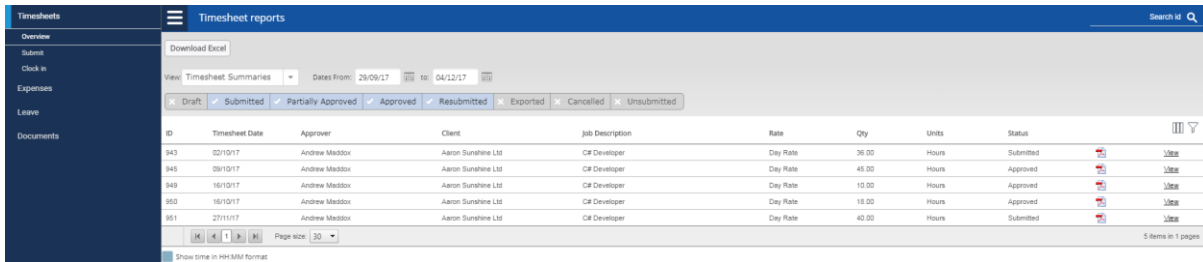


Download Timesheet

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View Past Timesheets

To view your past timesheets, click on *Overview* in the left hand navigation. This will present a table listing all your current and previous timesheets, showing basic information about the timesheet, such as its current status (submitted/approved/rejected).



The screenshot shows the 'Timesheet reports' interface. It includes a navigation menu on the left with options like Overview, Submit, Clock in, Expenses, Leave, and Documents. The main area displays a table of timesheet entries with columns for ID, Timesheet Date, Approver, Client, Job Description, Rate, Qty, Units, and Status. There are also filters for 'View: Timesheet Summaries', 'Dates From: 29/09/17 to: 04/12/17', and a status filter dropdown showing options like Draft, Submitted, Partially Approved, Approved, Resubmitted, Exported, Cancelled, and Unsubmitted. A 'Download Excel' button is visible at the top left of the main area.

ID	Timesheet Date	Approver	Client	Job Description	Rate	Qty	Units	Status
943	02/10/17	Andrew Maddox	Aaron Sunshine Ltd	CF Developer	Day Rate	36.00	Hours	Submitted
945	09/10/17	Andrew Maddox	Aaron Sunshine Ltd	CF Developer	Day Rate	45.00	Hours	Approved
949	16/10/17	Andrew Maddox	Aaron Sunshine Ltd	CF Developer	Day Rate	10.00	Hours	Approved
950	16/10/17	Andrew Maddox	Aaron Sunshine Ltd	CF Developer	Day Rate	18.00	Hours	Approved
951	27/11/17	Andrew Maddox	Aaron Sunshine Ltd	CF Developer	Day Rate	40.00	Hours	Submitted

To view the full details of a timesheet, click *View* on the right hand side to open it, or click on the PDF icon to download it as a PDF. You can also download the list of timesheets as an Excel file by clicking on *Download Excel* at the top of the page.