Guideline: Recording Time

Purpose

The purpose of this guideline is to support the Technical Workshop technicians in recording their time accurately within the Workshop Management System (herein referred to as the 'system').

Overview

One of the objectives of the Technical Workshop Management System is to understand in more detail the work undertaken by the Technical Workshops, and to be able to aggregate that data across all workshops. It is important to get accurate data as this will support the continuous development of the Technical Workshops at ANU through:

- Providing visibility of the combined *availability* of the Technical Workshop technicians (which takes into account leave as well as time away from active job-based work e.g. for admin, training etc.) thus supporting the ANU in understanding the true cost to deliver Technical Workshop services, which will ultimately inform the pricing of those services.
- Providing insight into the types of work being undertaken in multiple Technical Workshops across campus.
- Observing usage trends from the various Research Groups across campus.

To fulfil this objective, each of the Technical Workshops need to capture information in a consistent way.

This document will support technicians by providing the guidelines and process for recording time appropriately in the system. This will ensure consistent time recording, and hence consistent data collection, across all the Technical Workshops at the ANU.

The detailed process of how to record time is outlined in Appendix A 'How-to Guide 7 – Entering Time'. The guide explains, step-by-step, how to capture time, including how to enter directly within the job, or into the timesheet.

Guidelines

Time can be captured in the system in two different ways – through the job task or directly into the timesheet. Please note that Leave, Admin and Quote options can only be recorded through the timesheet.

1) All timesheets should be filled in at least on a weekly basis. For full time technicians a completed timesheet will cover 35 hours. For part time and casual technicians it should be the number of contracted hours or actual hours worked respectively.

2) Timesheets can be submitted on a weekly basis for review by the Workshop Manager. The Workshop Manger will review the technician timesheets and finalise it if they are satisfied. Once a timesheet has been finalised, no edits can be made by the Technician.

3) Admin and leave related activities are entered directly into the timesheet. Select the task most relevant to the work being undertaken when recording time. Please see *page 5 (Tasks related to activities available on the timesheet only)*.

4) If time needs to be recorded against building a quote or estimate, please use the "Quote" task. It should only be used for time associated with determining a quote or estimate and not for any other job related activity.

5) Record any leave that is taken using the 'Leave' activity. Flex leave doesn't need to be recorded as another system is used within the workshops to record this. Workshop managers will need to compare both systems.

6) Public holidays and the Christmas shut down do not need to be captured in the timesheet as they are not official work days.

7) If technicians would like to capture time spent on tea breaks, this can be recorded under the 'Admin > Other' task in the timesheet.

8) Time cannot not be allocated to a job prior to the job request being approved. The "Quote" task (through timesheet) is the only task to which time can be recorded prior to the customer providing approval. However, if time is allocated to a task prior to its approval, then it is to be entered as soon as practical within the timesheet.

9) Only record the actual time worked for a particular task/job on that day. Do not aggregate the total time worked across multiple days into a single entry, either on the timesheet or the job card. *Note: More information on the actual process of recording can be found in Step 5A of the 'How to Guide 7 - Entering time' (Appendix A)*

Tasks related to Request Forms

Each Request Form (job) has a set of "tasks" that are most commonly associated with that type of job. The tasks are used when recording time to a job and technicians should select the task most relevant to the work being undertaken when recording their time. The table below lists all the tasks associated with each job type and what they are to be used for:

Job Type	Task	Description	Incur Charge?
New Build / Modification	Quote / Estimate	Building a quote or estimate to provide to the customer for their approval (note, only available on the timesheet).	No
	Risk Assessment	The WHS assessment of all risks associated with the work to be undertaken to complete the job.	Yes
	Scope / Research	Researching information about the requested work as well as the scope or limits that will be required to meet the customer's needs, this includes discussions with the customer to clarify requirements.	Yes
	Design	The development of a detailed design that will allow a technician to manufacture or modify all relevant components required complete the requested work.	Yes
	Build	Undertaking the activities required to complete the job (e.g. manufacturing parts, assembly etc.)	Yes
	Documentation	Developing "as built" plans, or any other documentation that relates to the product or service provided. This may be a set of operational instructions or a detailed specification sheet.	Yes
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	Yes
Repair / Maintenance	Quote / Estimate	Building a quote or estimate to provide to the customer for their approval (note, only available on the timesheet).	No
	Risk Assessment	The WHS assessment of all risks associated with the work to be undertaken to complete the job.	Yes
	Scope / Research	Undertaking fault finding activities to determine the cause of the fault, this includes discussions with the customer to clarify requirements.	Yes
	Fault Fixing	Undertaking the activities required to repair a broken item (e.g. replacing parts, designing new and manufacturing new parts for replacement etc.).	Yes
	Maintenance	Undertaking the activities required to undertake scheduled work to ensure the ongoing and efficient functioning of an item (e.g. replacing parts, designing new and manufacturing new parts for replacement etc.).	Yes
	Documentation	Developing "as built" plans, or any other documentation that relate to the product or service provided. This may be a set of operational instructions or a detailed specification sheet.	Yes

Job Type	Task	Description	Incur Charge?
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	Yes
Test and Tag	Quote / Estimate	Building a quote or estimate to provide to the customer for their approval (note, only available on the timesheet).	No
	Test and Tag	Safety Inspection, testing equipment safety, tagging equipment to indicate it has been successfully tested.	Yes
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	Yes
Purchase Request	Quote / Estimate	Building a quote or estimate to provide to the customer for their approval (note, only available on the timesheet).	Yes
	Purchasing	All time spent in the purchase of the requested item/s, including researching product prices, availability, delivery times, etc.	Yes
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	Yes
Consultation Request	Consultation	Records time spent in consultation with a customer discussing or researching their needs, including any time spent writing up the conversation, advice given and any documentation. This could also be related to providing a quote or estimate or input into a grant application. Use this for consultations that require a considerable amount of time (e.g. more than 30 minutes) for a specific customer request.	No
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	No
Workshop Job	Risk Assessment	The WHS assessment of all risks associated with the work to be undertaken to complete the job.	No
	Equipment Repair	Undertaking the activities required to repair a broken item.	No
	Equipment Maintenance	Undertaking the activities required to undertake scheduled work to ensure the ongoing and efficient functioning of an item.	No
	House Keeping	Duties that are required to keep the workshop running, that are not related to a quote, repair or maintenance task. This could include, cleaning, stock taking, tidying, etc.	No
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	No

Tasks related to activities available on the timesheet only

Compared to the job systems previously used by the Technical Workshops, there is no need to create 'jobs' for administrative tasks or leave, as time for these can be directly entered within the timesheet. The technicians should select the task most relevant to the work being undertaken when recording their time. The table below lists all the tasks associated with the admin and leave activities and what they are designed to be used for:

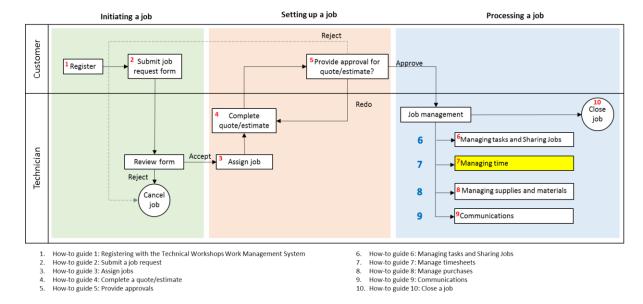| Activity	Task	Description	Incur Charge?
Admin	Meeting	Time spent in meetings (e.g. team, school, university) that are not directly related to a specific job.	No
	Customer Discussion	Similar to the 'Consultation' request described above, however there is one key difference, this is for short (30 minutes or less) discussions, which are not directly related to a specific job, with customers, i.e. time spent dealing with a customer that is not covered by the consultation request form or cannot be allocated under the Scope / Research task to a specific job. Please include a comment that gives a brief overview e.g. who (customer/research group name) and what (e.g. advice on purchasing materials).	No
	Training	Any training that you undertake as part of your ANU employment	No
	WHS Activities	Any time spent in WHS meetings, WHS inspections etc. that are not directly related to a specific job	No
	General Admin	Any general administration task that relates to the workshop or your employment that cannot be associated to a specific job. This could be developing a working roster, undertaking paperwork for staff PDRs / pay / leave, etc.	No
	Other	Any activity not covered by the Tasks on the drop down menu. All "Other" tasks require a comment that describes the activity being undertaken.	No
Leave	Leave	All leave taken including scheduled and unscheduled. Please note that this does not replace any leave applications made through HORUS. Information on staff leave is used here to calculate the true staff availability of the Technical Workshops.	No

Appendix A- Entering Time

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how a technician can log their time worked in the Technical Workshops Management System. We have produced a series of 'how-to guides' that can be accessed from the System webpage, which can be found here: https://services.anu.edu.au/information-technology/software-systems/technical-workshop-work-management-system

Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.

1. How-to guide 1: Registering with the Technical Workshops Work Management System
2. How-to guide 2: Submit a job request
3. How-to guide 3: Assign jobs
4. How-to guide 4: Complete a quote/estimate
5. How-to guide 5: Provide approvals
6. How-to guide 6: Managing tasks and Sharing Jobs
7. How-to guide 7: Manage timesheets
8. How-to guide 8: Manage purchases
9. How-to guide 9: Communications
10. How-to guide 10: Close a job

All time spent working for the ANU must be recorded in the WMS against the appropriate activity.

A: Entering Time via the Time Sheet

Step A1:

The Timesheet Tool allows each Technician to record their time spent on a job, admin tasks or leave. Time added in the Timesheet will show up in the job card and vice versa.

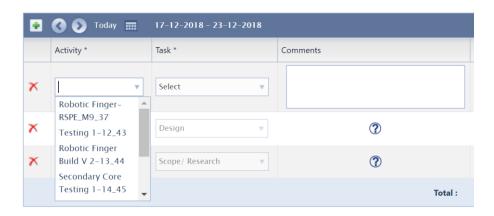Go to Technician or Facility Admin> Inbox> Time Sheet

Step A2:

To log time for a new activity and task, click the plus sign in the top left of the grid to add a new line item. For an existing activity and task go to **Step 5**. You may use either the 'Day' or 'Week' view.

Step A3:

Choose the job from the 'Activity' dropdown. This section contains all of the jobs assigned to you and displays the Job Title then the Job ID. If you've marked a job as a favourite, the job will show at the top of the list. The list is also searchable, just type in the box to narrow the results shows.

At the bottom of the list will be the 'Admin' and 'Leave' options.

Step A4:

Once a job is selected from the 'Activity' dropdown, you will then be able to choose a 'Task' from the dropdown in the next column. Each form type has a set of specific associated 'Tasks'. Tasks are also defined for the Admin and Leave types. You may also add a comment if required. If a '?' is displayed in the Comments column, a comment has been added, hover over the '?' to view the comments. If you wish to add more comments, please use the Day view.

Note: There is a Task for 'Quote' that is only available in the Timesheet tool. Record any time spent on developing quotes or estimates here.

Step A5:

Enter the time spent on each Activity and Task for that respective day. The total hours will calculate to the right. Please note that you cannot enter time for future days, only for today or the past.

Note: You can only use a specific task once per job per day, if for example you spend 1 hour in the morning and then 2 hours in the afternoon building something for the same job this will be recorded as 3 hours of building on that day against that job. If however you did 2 hours work on Wednesday and another hour on Thursday this would register as two different instances of the same task within the job, one on Wednesday for 2 hours and one on Thursday for 1 hour. To enter the time in the timesheet, do the following: in the first example above you would enter 3 hours against the build task for job, in the second example you would enter 2 hours into the Wednesday column for the build task for the job, and 1 hour in the Thursday column on the same line.

If you enter your time via the time sheet by directly entering the time into the appropriate box you must manually calculate the total number of hours. For example, if you undertake 3 hours of work in the afternoon and you had already entered 2 hours for the same job on the same task in the morning you will need to enter 5 hours.
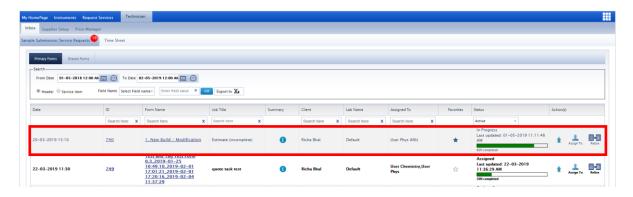
Step A6:

To use the Start-Stop timer in the Timesheet Tool, click on the Day View and follow steps 2, 3 and 4 detailed above. Then select the 'Start' Button.

Click 'Save' at the bottom before leaving the page and the timer will continue to run. When the task is finished, come back to the timesheet to stop the timer. If you use the "Start" and "Stop" buttons any time will be added to the existing total
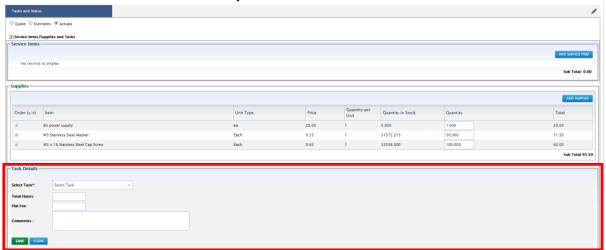
B: Entering Time via the Job Card
Step B1:
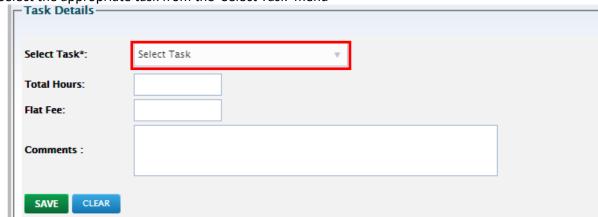Select the appropriate job from the job queue

Step B2:
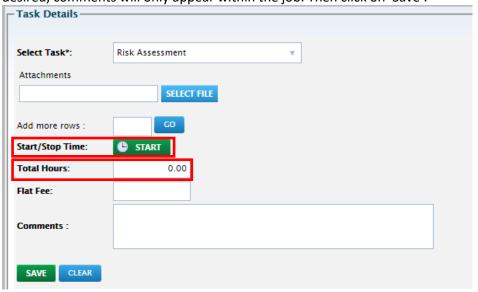Go to the "Task Details" box within the job

Step B3:
Select the appropriate task from the 'Select Task' menu

Note if the task that you need is not present in the drop down list, then either that job has not yet been approved by the customer or the task has already been used for that day and you will need to edit the line entry, see Step B5.
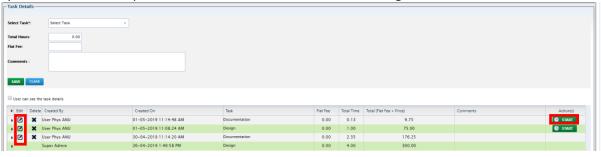
Step B4:

There are 2 options to record time at this point, either click on the green start button which will start a timer that you will have to stop once the activity has been completed, or enter the number of hours spent in the 'Total Hours' box. You may also enter a comment into the Comments box if desired, comments will only appear within the job. Then click on 'Save'.
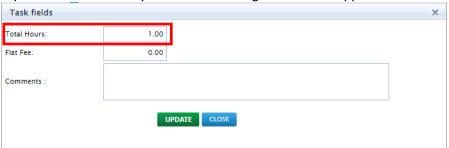

Step B5:

If you are adding more time to a job that you have already worked on during the day click the 'Edit' symbol next to the required line item or on the start button if using the timer.

If you select the 'Edit' Symbol the following window will appear

Update the 'Total Hours', manually calculating the total hours worked. For example, if you undertake 3 hours of work in the afternoon and you had already entered 2 hours for the same job on the same task in the morning you will need to enter 5 hours.

Once finished click on the 'Update' button to save your changes.