Tempora Basic Admin Guide

Quick Links for Frequently Asked Questions

- How do I add a new staff member?
- How do I remove a staff member?
- How do I reset a password?
- How do I unpost a timesheet?
- How do I add a new client / project / activity?
- How do I remove a client / project / activity?

Table of Contents

1 Staff

1.1 Adding New Staff

1) Click on **Admin > Staff > Add New**
2) If the **Total current active users on licence** is the same as the **Max current active users allowed on licence**, then you will need to purchase more licences by contacting sales@temporasoftware.com
3) Enter the new staff member's **First Name** and **Last Name**.
4) Click **Auto Generate** to generate a **Login Code** for the new staff member.
5) Enter the staff member's **Joining Date** and their **Email Address**
6) Select the staff member's **Office**, **Department** and **Job Title**.
7) Enter their **Hourly Cost Rate** if known (the hourly cost of employing them)
8) Enter their **Normal Hours Per Week** worked (for example, 37.5)
9) Set the **Timesheet Start Date** and **Activation Date** to be the same as the **Joining Date**.
10) Click **Save**

1.2 Sending Someone their Login Details / Password Reset

1) Click on **Admin > Staff > (Name of Staff Member) > Edit**
2) Note the staff member's **username** (displayed in the **Login Code** field)
3) Click on **Admin > Staff > (Name of Staff Member) > Reset Password > Reset**
4) Email the **username** and **Password Reset Link** to the staff member

1.3 Editing Existing Staff

1) Click on **Admin > Staff > (Name of Staff Member) > Edit**
2) Edit the fields you wish to change, and then click **Save**

1.4 Removing Leavers

1) Click on **Admin > Staff > (Name of Staff Member) > Edit**
2) Set the **Leaving Date** to the date they ended employment, and then click **Save**

1.5 Reinstating Leavers

1) Click on **Admin > Staff**
2) Set **Show Current Items** to **Show All Items** (located in the top-left of Tempora)
3) Click on **Admin > Staff > (Name of Leaver) > Edit**
4) Clear the **Leaving Date** field, and then click **Save**

2 Unposting a Staff Member's Timesheet

To do when a staff member needs to amend a timesheet they've posted (locked down):

1) Click on **Time Entry > (Name of Staff Member)**
2) Set the **Week starting** to the week to be unposted
3) Click **Unpost**

3 Clients

3.1 Adding New Clients

1) Click on **Admin > Clients > Add New**
2) Enter the name for the new client in the **Code**, **Description** and **Short Desc** fields
3) Click **Save**

3.2 Editing Existing Clients

1) Click on **Admin > Clients > (Name of existing client) > Edit**
2) Edit the fields you wish to change, and then click **Save**

3.3 Removing Clients

1) Click on **Admin > Clients > (Name of existing client) > Edit**
2) Set the **Expiry Date** field to the date that the client became inactive
3) Click **Save**

3.4 Reinstating Clients

1) Set **Show Current Items** to **Show All Items** (located in the top-left of Tempora)
2) Click on **Admin > Clients > (Name of client) > Edit**
3) Clear the **Expiry Date** field and then click **Save**

3.5 Adding / Editing / Removing / Reinstating Projects & Activities[1]

1) **Projects** are found under **Admin > Clients > (Name of Client) > Project**
2) **Activities** are found under **Project > (Name of Project) > Activity**
3) **Projects** & **Activities** are changed in the same way as **Clients** (see 3.1 – 3.4 above)
4) **Activities** should have the **Time Entry Level** checkbox ticked to allow time to be recorded against them.

3.6 (Optional) Templates

Templates can save time when setting up multiple clients that share the same set of projects / activities. For an explanation of how templates work, please click here.

[1] Assumes your organisation is configured with a standard 3-level client structure (Client > Project > Activity)

4 Departments

4.1 Adding Departments

1) Click on **Admin > Departments > Add New**
2) Enter the name of the department in the **Description** field
3) Set **Minimum Staff %** to **1**
4) Click **Save**.

4.2 Renaming Departments

1) Click on **Admin > Departments > (Name of Department) > Edit**
2) Change the name in the **Description** field
3) Click **Save**

4.3 Deleting Departments

1) Click on **Admin > Departments > (Name of Department) > Delete**
2) Click **Delete**

5 Job Titles

5.1 Adding Job Titles

1) Click on **Admin > Job Titles > Add New**
2) Enter the name of the job title in the **Description** field
3) Tick the **Department(s)** that the job title is applicable to
4) Click **Save**

5.2 Renaming Job Titles

1) Click on **Admin > Job Titles > (Name of Job Title) > Edit**
2) Change the name In the **Description** field
3) Click **Save**

5.3 Deleting Job Titles

1) Click on **Admin > Job Titles > (Name of Job Title) > Delete**
2) Click **Delete**

6 Entering Income / Retainers / Fee Schedules

Recording income and configuring retainers / fee schedules for your clients are covered in a separate guide which can be found by clicking here.

7 Rates

7.1 Types of Rate

1) **Cost Rate** represents the hourly cost to your business of employing a staff member.
2) **Time Selling Rate** represents the hourly fee that you charge out for your staff's time.

7.2 To set a Staff Member's Cost Rate

1) Click on **Admin > Staff > (Name of Staff Member) > Cost Rates > (Name of Company)**
2) Click **Edit**
3) Enter the staff member's cost rate in the **Rate** field
4) Click **Update**
5) Click **Save**

7.3 To configure Time Selling Rates

1) Click **Admin > Time Selling Rates**
2) Click **Add New**
3) Select a Staff member's **Name** or a **Job Title** that you want to specify the time selling rate for
4) Enter the time selling rate in the **Rate** column
5) Enter the **Effective From** date for this time selling rate
6) Enter the **Effective To** date for this time selling rate (leave blank if permanent)
7) Click **Update**
8) Click **Save**

8 Reports

8.1 Types of Reports

All reports can be found under the **Reports** tab – some useful reports include:

1) **Client Reports > Total Time by Client by Month** – shows the total hours recorded against each client per month.
2) **Client Reports > Profit / (Loss) With Costs by Month** – shows the profitability of your clients and associated costs.
3) **Sales / Purchase Reports > Billing Guide** – shows an itemised breakdown of work performed and the value of items to be billed.
4) **Department Reports > Staff Utilisation (%)** – shows the percentage of time your staff spend between internal and billable activities.

8.2 Running / Exporting Reports[2]

1) Select the report you want to run under the **Reports** tab
2) Set the **Client / Project / Activity** that you want to run the report for
3) Set the **From Period / Date** and the **To Period / Date** that you want the report to cover
4) Set the **Detail Level** according to how detailed you want the report to be (Client = least detail, Activity = most detail)
5) Click **Run** to display the report, or **Export** to save the results to an Excel (CSV) file

8.3 Adding a Report to Your Favourites

1) Select the report that you want to add to your favourites under the **Reports** tab
2) Tick the **Favourite** checkbox in the top-right and then click **Run**
3) The report will now appear under your favourites (**Reports > Favourite Reports**)

8.4 Automating Reports

Reports can be **automatically run** and emailed to you on a **schedule of your choice**. For instructions on how to automate a report, click here.

9 Troubleshooting

I can't add a new staff member / re-instate a leaver

You may have run out of licences – contact sales@temporasoftware.com for more licences.

I can't set a staff member's leaving date

They may have recorded time in advance of their leaving date. Check that the timesheets after their leaving date are clear and then attempt to set their leaving date again.

I can't find where a staff member's Department or Job Title is set

These are specified in the staff member's cost rate record found under Admin > Staff > (Name of staff member) > Cost Rates > (Name of Company).

I can't delete a Department or a Job Title

The department / job title may be associated with one or more staff members – reassign these staff members' departments / job titles first, and then attempt the deletion again.

The error "Unable to enter time at this level" occurs when recording time against an activity

Ensure that the Time Entry Level checkbox is ticked for the activity (see section 3.5 above).

I have a problem that isn't covered by this guide.

Contact us at support@temporasoftware.com

[2] Note that some settings (e.g. "Detail Level") will only be applicable to some reports.