

# OPUS

## SIE DATA CLOUD

### Timesheets

The big idea behind Timesheets is that Session Logs can drive Timesheets. This means that the instructor only needs to post a Session Log and a timesheet will automatically be created.



[Click here to view a training video on Timesheet setup.](#)

Center SIE Template



Home Calendar People Approve My Session Logs My Timesheets Media Work Orders Reports Operations Admin

Centers Session Setup **Configuration** Places Email Log Tests

User Tags Products Task Topics **Timesheet Types** System Email Templates Email Templates Grades Referred By Labels Custom Text Application Status

search Add Timesheet Type ?

Record deleted..

Name	Rate	Default
Master Tutor	\$25.00	Edit
Standard Tutoring	\$22.00	Edit
Standard Tutoring (On-Line)	\$20.00	Edit Delete

account search ?

Timesheet Types are the pay rates you setup to pay your instructors and administrators.

To create or edit a Timesheet Type, go to Admin / Configuration / Timesheet Types. Here you will see a list of Timesheet Types and a Default Pay Rate. This rate can be overridden by a specific rate for individual tutors. We'll look at that later.

To add a new Timesheet Type click on Add Timesheet Type

The screenshot shows a web form for adding a new Timesheet Type. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'Name' field containing 'Master Tutor (On-line)' with a checkmark icon to its right, labeled 'a'. To the right of the name field is an 'Auto Types' section. It includes an 'Add Auto Timesheet Type' button labeled 'b', two checkboxes for 'Auto Assign New Instructor' and 'Auto Assign New Administrator', and five input fields: 'Default Hours' (0) labeled 'c', 'Default' (checkbox), 'Rate' (25) labeled 'd', 'Percentage' (0), 'Late Cancel Rate' (0), and 'Absent Rate' (25) labeled 'E'. Below the description field, there are 'Save' and 'Cancel' buttons.

- Enter a name.
- Auto Assign New Instructor: if checked, this Timesheet Type will automatically be added to new instructor's accounts when created.
- This is the default duration for a Timesheet entry. This will not apply for instructors pay as their duration will match the Session Log they create for the student. You can leave this as 0 or enter 1hr. Again, it will be overridden if the session is longer or shorter than an hour.
- Enter the default rate for this Timesheet. Know that you can create an override rate for individual instructors. (Ex: you want to pay a given instructor \$.50 more per hour. You would set that up under the instructor's account. We will look at that later.)

- e. Do you want to pay the instructor for Late Cancelled and/or Absent students? Enter the amount here.

The screenshot shows the 'School is Easy TUTORING' Admin interface. The 'Admin' tab is selected, and the 'Session Types' sub-tab is active. A table lists four session types with their respective rates and default timesheet types. The 'Add Session Type' button is visible.

Name	Def. Timesheet Type	Default	Selectable	Rate	Absent Rate	Late Cancel Rate	
In-Home Tutoring	Standard Tutoring		✓	\$50.00	\$0.00	\$0.00	<a href="#">Edit</a> <a href="#">in use</a>
In-Home Tutoring (Master Instructor)	Master Tutor		✓	\$1.00	\$0.00	\$0.00	<a href="#">Edit</a> <a href="#">in use</a>
Online Tutoring			✓	\$1.00	\$0.00	\$0.00	<a href="#">Edit</a> <a href="#">in use</a>
Online Tutoring (Master Instructor)			✓	\$1.00	\$0.00	\$0.00	<a href="#">Edit</a> <a href="#">Delete</a>

Now let's look at Session Types under the Admin tab. Here we can see a list of Session Types. Session Types are the billable services you provide to your customers. They have a name and a default rate associated. Know that you can override this rate under the students account if you want to charge an individual student a different rate.

Also notest the Def. Timesheet Type column. This specifies what Timesheet should be used when a given Session Type is included in a Session Log. Above we see that the Session Type "In-Home Tutoring" creates a default Timesheet Type "Standard Tutoring".

Click Add Session Type to Create a new Session Type.

Save Cancel

**a** Name Elementary Academic Support

Client Note Template

Selectable

Default

**b** Sort 0

**c** Rate 49

Use QB Web Connect

Attended QB Class

Use Location QB Class

Attended QB Account

Attended QB Item Name

**d** Use Cancel

Late Cancel Rate 20

Late Cancel QB Account

Late Cancel QB Item Name

Use Absent

**e** Absent Rate 49

Absent QB Account

Absent QB Item Name

**f** Default Timesheet Type

Billable

Save Cancel

Previous page screenshot.

- Name the Session Type. Keep it simple. Make it descriptive. Parents will see this Session Type name on their student's Session Logs.
- Sort - use this to sort the order that the Session Types appear in the lists.
- Rate - define the default rate. Remember that you can override this rate under the student's account, subtab Session Types.
- Decide if you want to charge for Late Cancel and/or Absent
- Same as d.
- Add a default Timesheet Type. If you always want to pay instructors a given Timesheet Type when they log a particular Session Type, then add it here.

Center SIE Template Jared Wells (logout) | My Account | Feedback? Rep

School is Easy TUTORING

Home Calendar People Approve My Session Logs My Timesheets Media Work Orders Reports Operations Admin System

Centers **Session Setup** Configuration Places Email Log Tests

Subject Attendance **Session Types** Rating 1 Rating 2 Rating 3 Rating 4

### Session Types

search  Showing Selectable Add Session Type

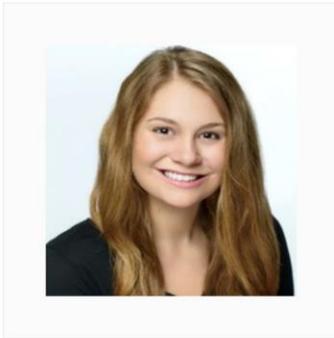
Sessiontype updated... (edit)

Name	Def. Timesheet Type	Default	Selectable	Rate	Absent Rate	Late Cancel Rate	
<b>Elementary Academic Support</b>	<b>Standard Tutoring</b>		✓	\$49.00	\$49.00	\$20.00	Edit Delete
In-Home Tutoring	Standard Tutoring		✓	\$50.00	\$0.00	\$0.00	Edit in use
In-Home Tutoring (Master Instructor)	Master Tutor		✓	\$1.00	\$0.00	\$0.00	Edit in use
Online Tutoring			✓	\$1.00	\$0.00	\$0.00	Edit in use
Online Tutoring (Master Instructor)			✓	\$1.00	\$0.00	\$0.00	Edit Delete

« < > » 1-5 of 5 1

Now you can see that Session Type, “Elementary Academic Support”, has a default Timesheet Type, “Standard Tutoring”. Every time an instructor creates a session log with the Session Type, “Elementary Academic Support” session log, they will receive a timesheet entry using the Timesheet Type, “Standard Tutoring”. One thing to note, if the instructor has a Timesheet Type under their account with a different override rate, this override rate will be used. We’ll see how to add Timesheet Types to instructor account next.

Back



White, Mary [Edit](#)

Email:

Primary Phone: 888-888-8888

Secondary Phone: 888-555-5555

Account Note:

Address: 555 Main Street  
Anytown, L4B 1J8

Admin Note: Three years experience teaching math through Calculus II and Differential Equations. Masters Degree in Mathematics.

[Upload](#)

[Delete Picture](#)

Calendar Relationships Sessions Tasks Comm Logs Tags Timesheets **Timesheet Types** Students Groups Regions Media

Add +

Name	Default	Auto. Session Types	Rate	
Master Tutor		In-Home Tutoring (Master Instructor)	\$26.00	<a href="#">Edit</a> <a href="#">Delete</a>
Standard Tutoring		In-Home Tutoring	\$22.00	<a href="#">Edit</a> <a href="#">Delete</a>

« < > » 1 - 2 of 2 1

Instructor Mary White has two Timesheet Types associated with her account. If she didn't have these Timesheet Types listed, then the system would have used the Default Timesheet Types associated with her Session Logs' Session Types. However, Mary does have the a) Timesheet Type "Master Tutor" listed with the b) Auto Session Type "In-Home Tutoring (Master Instructor), paid at the c) override rate of \$26/hr. A new "Master Tutor" timesheet paid at \$26 will be created every time Mary creates a Session Log using the "In-Home Tutoring (Master Instructor)" Session Type.

**Admin Note:** Three years experience teaching math through Calculus II and Differential Equations. Masters Degree in Mathematics.

Upload | Delete Picture

Calendar Relationships Sessions Tasks Comm Logs Tags Timesheets **Timesheet Types** Students Groups Regions Media

Add ?

Name	Default	Auto. Session Types	Rate	
Master Tutor		In-Home Tutoring (Master Instructor)	\$26.00	<a href="#">Edit</a> <a href="#">Delete</a>
Standard Tutoring		In-Home Tutoring	\$22.00	<a href="#">Edit</a> <a href="#">Delete</a>

« < > » 1 - 2 of 2 1

account search

[Home](#) | [Features](#) | [Pricing/Sign Up](#) | [About Us](#) | [Privacy](#) | [Returns](#)

Copyright © 2019 School Is Easy Inc. All rights reserved.

We can create associate additional Timesheet Types or edit existing Timesheet Types under the instructor's account.

[Back To Account Timesheet Types](#)

### Edit Timesheet Type

[Save](#) [Cancel](#)

[Timesheet Type](#) Standard Tutoring ▼ ✓

[Auto Types](#)

[In-Home Tutoring](#) [Remove](#)

**b**  [Remove](#)

**a** [Add Auto Timesheet Session Type](#)

[Default](#)

[Use Override Rate](#)

[Override Rate](#)

[Use Override Percentage](#)

[Override Percentage](#)

[Use Override Late Cancel Rate](#)

[Late Cancel Rate](#)

[Use Override Absent Rate](#)

[Absent Rate](#)

[Save](#) [Cancel](#)

In addition to the “Master Tutor” Timesheet Type, Mary had the “Standard Tutoring” Timesheet Type associated with her account.

See above that for Mary’s account, this “Standard Tutoring” Timesheet Type already was associated with “In-Home Tutoring” Session Type. Remember, this means that any time Mary creates a session log with In-Home Tutoring, she will receive a “Standard Tutoring” timesheet entry. See above that “Use Override Rate” is not checked. This means that Mary will receive the default rate we setup under the admin tab.

Now let’s say that we also want Mary to receive this same “Standard Rate” timesheet entry when she creates sessions with the “Online Tutoring” Session Type. To do this, we click on the Add Auto Time (Yeah, need to fix that button!) and enter the “Online Tutoring” Session Type, then save.

Upload | Delete Picture

- Calendar
- Relationships
- Sessions
- Tasks
- Comm Logs
- Tags
- Timesheets
- Timesheet Types**
- Students
- Groups
- Regions
- Media

Accounttimetype updated... (edit)

Add

Name	Default	Auto. Session Types	Rate	
Master Tutor		In-Home Tutoring (Master Instructor)	\$26.00	<a href="#">Edit</a> <a href="#">Delete</a>
Standard Tutoring		In-Home Tutoring , Online Tutoring	\$22.00	<a href="#">Edit</a> <a href="#">Delete</a>

<< < > >> 1 - 2 of 2 1

account search

Now you can see that under Mary's account, subtab Timesheet Types, "Standard Tutoring" timesheets paid at \$22/hr will be created anytime Mary creates In-Home Tutoring or Online Tutoring session logs. Nice! We love automation!

Center SIE Template Jared Wells (logout) | My Account | Feed

**School is Easy TUTORING**

- Home
- Calendar
- People
- Approve**
- My Session Logs
- My Timesheets
- Media
- Work Orders
- Reports
- Operations
- Admin

Sessions (8) Timesheets (114) Uninvoiced (27) Invoices (5) Payments QB Web Connector QB Online Queue Mail Queue Test Essays

Mary  Filter Approved Unapproved Session Date 7/8/19

All  Approve Selected Unapprove Selected

Approved	Req	Session Date	Hours	Price	Type	Subject	Att	Session Sent	Media	Has Timesheet	Invoiced	Draft
<input type="checkbox"/>	<b>i</b>	07/11/19 10:30 am PDT	1	\$100	In-Home Tutoring (Master Instructor)	English	Attended		<input checked="" type="checkbox"/>	<b>d</b>		<a href="#">Edit</a>
		Student: Baker, Jimmy <b>b</b>			Instructor: White, Mary <b>a</b>		Location: In-Home					<a href="#">Approve</a>

<< < > >> 1 - 1 of 1 1 Rows: 5

account search

[Home](#) | [Features](#) | [Pricing/Sign Up](#) | [About Us](#) | [Privacy](#) | [Returns](#)

When Session Logs are created, they appear under the Approve Tab. Here you can see that:

- Mary had a session with
- Jimmy Baker
- Using the In-Home Tutoring (Master Instructor) session type (*Let's ignore the \$1/hr rate we are charging this customer! Hey, it's a test account. Cut me some slack.*)
- And we see that a Timesheet has been created. Yea! Worked!

Center SIE Template Jared Wells (logout) | My Account

School is Easy TUTORING

Home Calendar People Approve My Session Logs My Timesheets Media Work Orders Reports Operations Admin

Sessions 9 Timesheets 116 Uninvoiced 26 Invoices 5 Payments QB Web Connector QB Online Queue Mail Queue Test Essays

jimmy Filter Approved Unapproved Filter Paid Unpaid Date YTD MTD Last Month Last Week Yesterday Today Tomorrow

All Approve Selected Unapprove Selected Mark Selected Paid Mark Selected Unpaid

	Appr.	Paid	Timesheet Date	User	Type	Hours	Rate	Amount	
<input type="checkbox"/>	<a href="#">Filter Approved</a>	<a href="#">Unapproved</a>	07/08/19 8:30 am PDT	White, Mary	Standard Tutoring	1	\$22.00	\$22.00	<a href="#">Edit</a> <a href="#">Delete</a>
This timesheet was automatically created by a session. Date:: 07/08/19 8:30 am PDT Hours: 1 Attendees: Jimmy Baker, <a href="#">Approve</a>									
<input type="checkbox"/>	<a href="#">Filter Approved</a>	<a href="#">Unapproved</a>	07/11/19 10:30 am PDT	<a href="#">a</a> White, Mary	<a href="#">b</a> Master Tutor	1	\$26.00	\$26.00	<a href="#">Edit</a> <a href="#">Delete</a>
This timesheet was automatically created by a session. Date:: 07/11/19 10:30 am PDT Hours: 1 Attendees: Jimmy Baker, <a href="#">c</a> <a href="#">Approve</a>									

<< < > >> 1 - 2 of 2 1 Rows: 5

account search

Under the Approve / Timesheets tab, we see that:

- Mary White
- Received a Master Tutor timesheet entry
- For a session with Jimmy Baker. Remember, because of our setup, this was created automatically when Mary created the Session Log.
- And, we can see that she was paid the override rate of \$26/hr.



b

timesheet Add Report ?

Name	Description	Direct Run	Fav.
<b>Approved Timesheet Client Export</b>	Approved Timesheet Export targeted to specific clients	<input type="checkbox"/>	<a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Timesheet Export</b>	Approved Timesheet Export	<input type="checkbox"/>	<a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Timesheet Export Single Line</b>	Approved Timesheet Export with note linefeeds stripped to maintain a single line.	<input type="checkbox"/>	<a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Timesheets a</b>	Approved timesheets	<a href="#">YTD</a> <a href="#">MTD</a> <a href="#">Last Month</a> <a href="#">Yesterday</a> <a href="#">Today</a>	<input checked="" type="checkbox"/> <a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Timesheets by First Name</b>	Approved timesheets, sorted by instructor first name rather than last name.	<a href="#">YTD</a> <a href="#">MTD</a> <a href="#">Last Month</a> <a href="#">Yesterday</a> <a href="#">Today</a>	<input type="checkbox"/> <a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Timesheets By Instructor and Type</b>	Approved timesheets by instructor and timesheet type	<input type="checkbox"/>	<a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Unpaid Timesheet Export</b>	Approved Unpaid Timesheet Export	<input type="checkbox"/>	<a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Approved Unpaid Timesheets</b>	Totals approved unpaid timesheet hours and value, broken out by instructor. Includes all approved unpaid timesheets prior to selectable end date. Filterable by instructor. Includes the instructor, timesheet date/time, length, rate, and value. Also includes the student, session type, and attendance value if the timesheet is related to a session. (Note: selecting a start date does not affect this report)	<a href="#">YTD</a> <a href="#">MTD</a> <a href="#">Last Month</a> <a href="#">Yesterday</a> <a href="#">Today</a>	<input type="checkbox"/> <a href="#">Copy</a> <a href="#">Edit</a> <a href="#">Delete</a>

At the end of a payment period, we can run a report, Approved Timesheets.

White, Mary

Date	Type	Attendance	Session Type	Student	Rate	Hours	Extended
01/15/19 10:30 am PST	Standard Tutoring	Attended	In-Home Tutoring	Chin, Mark	\$22.001		\$22.00
01/21/19 3:30 pm PST	Standard Tutoring	Attended	In-Home Tutoring	Chin, Mark	\$22.001		\$22.00
07/08/19 8:30 am PDT	Standard Tutoring <b>a</b>	Attended <b>b</b>	In-Home Tutoring <b>c</b>	Baker, Jimmy <b>d</b>	\$22.001 <b>e</b>		\$22.00
07/11/19 10:30 am PDT	Master Tutor <b>f</b>	Attended <b>g</b>	In-Home Tutoring (Master Instructor) <b>h</b>	Baker, Jimmy <b>i</b>	\$26.001 <b>j</b>		\$26.00
			Instructor Total			4	\$92.00
				Total		7	\$158.00

Here we see Mary's hours for the pay period.

- a. The Timesheet Entry using a Timesheet Type
- b. Attendance
- c. The associated Session Type
- d. The Student
- e. The pay rate
- f. A different Timesheet Entry using a different Timesheet Type
- g. With attendance
- h. For a different associated Session Type
- i. Student
- j. And pay rate.

That's it! Could that be easier? Probably, but where would the fun be in that?