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Office Timesheets Installation and User's Guide

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# **About Office Timesheets**

Office Timesheets is a web-based time and expense management application. Office Timesheets is a highly configurable timesheet tracking and management software application primarily used by project-driven organizations that need to keep track of employee time reporting for accurate job costing, accounting and/or billing of professional services. Office Timesheets also provides extensive functionality for tracking project-related expenses.

Office Timesheets is designed from the ground up as a web-based application which ensures a quick, installonce, use everywhere, deployment. Office Timesheets is developed using Microsoft's latest and most sophisticated web development platform architecture (ASP.NET AJAX) along with an ultra-intuitive Microsoft Office Fluent style interface to ensure ease of use and minimal end-user training.

Office Timesheets offers a rich feature set that allows you to customize the application to your specific needs and requirements. Here is a brief synopsis of Office Timesheets' features and capabilities...

## **Key Office Timesheets Features**

Office Timesheets offers a rich feature set that allows you to customize the application to your specific needs and requirements. Here is a brief synopsis of Office Timesheets' features and capabilities:

- Configurable timesheet for project costing, client billing & time and attendance
- 10 customizable tracking levels
- 30 customizable Entry and Task-based status flags
- Easy to use, 100% web-based timesheets with Windows application-like functionality via AJAX
- Real-time graphical reports that provide insight into productivity
- Six customizable employee rate tables with a facility of tracking effective dates and overtime rates at each level
- Customizable rules for creating and managing time tracking tasks
- Email notifications to encourage prompt submission of timesheets
- Configurable approval process to fit your business
- Easy expense tracking in multi-currency; auto tax calculations
- Flexible, multi-client billing/invoicing options
- DCAA-compliant timesheets and audit trails facility allow businesses to follow regulatory guidelines (eg: Sarbanes Oxley, DCAA, FMLA, etc.)
- Integrates with Microsoft Project and QuickBooks
- Easy import/export of data files from/to common databases and spreadsheets
- Can be configured to meet the needs of any organization
- In-depth reporting facilitates highly detailed analysis for breaking down costs at granular levels:
  - By employee
  - By client or cost center
  - o By project
  - o By phase
  - o By task

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o By any other factor that is important for understanding cost and profitability

## **Editions**

There are two editions of Office Timesheets— the Self-install (on-premise) edition and On-Demand (hosted) edition. Both versions are available as 30-day trial demos.

### **On-Premise Edition: Office Timesheets**

The On-Premise Edition is installed on your Web and/or Intranet server. After installation, you can run the Office Timesheets application just as you run other software on your computer. Once the application has been installed on your office internet server, it can be accessed by all your employees to collaboratively manage their time and expenses.

This is the preferred method of deployment for customers who want maximum control over their installation and database. The On-Premise edition of Office Timesheets allows you to integrate Office Timesheets with your Windows Active Directory (which is not allowed by the On-Demand Edition).

If you have not done already, you can download the On-Premise Edition installer from our website at <u>http://www.officetimesheets.com/trial/download\_self\_installed.aspx</u>.

NOTE: Note: After the 30-day trial period, if you decide to continue using Office Timesheets On-Premise Edition, you will incur a one-time charge for the Office Timesheets software license along with a small annual fee for support, maintenance and upgrades.

### **On-Demand (Hosted) Edition**

The Office Timesheets On-Demand Edition is hosted in a professional data center and managed by Lookout Software. You simply create an account and Office Timesheets will set up a blank live database and sample database in Lookout Software's hosted server cloud. You can access the software via the Internet by connecting to our server with your web browser.

If you have not done already, you can create an On-Demand for your organization at <u>https://www.officetimesheets.com/trial/hostingregister.aspx</u>.

NOTE: After the 30-day trial period, if you decide to continue using Office Timesheets On-Demand Edition, you will be billed a monthly fee based on the number of active user login accounts (active users) you have defined. Pricing for Office Timesheets is listed our website at <a href="https://www.officetimesheets.com/purchase/pricing.aspx">https://www.officetimesheets.com/purchase/pricing.aspx</a>.

### **Office Timesheets On-Premise Edition Installation Requirements**

Office Timesheets is a web-based application. Thus, before you can use Office Timesheets you must install and configure the application on your Web or Intranet server. Once Office Timesheets has been installed on your server, you can access the application via Microsoft Internet Explorer and/or Mozilla Firefox web browsers using Windows or Apple Macintosh computers.

Note: Installation is required only for the On-Premise Edition of Office Timesheets. There is no installation for the On-Demand (Hosted) Edition of Office Timesheets.

The following are the minimum and desirable system requirements for Office Timesheets:

Office Timesheets Server Application System Requirements

	Minimum	Desirable
OS	Windows 2003	Windows 2019
Web-Server	IIS 7.0	IIS 8.0 or higher
.Net Framework	ASP.Net 4.5	ASP.Net 4.6 or higher
RAM	512MB	2GB or higher
Disk Space	30MB	30MB

Office Timesheets Database System Requirements

	Minimum	Desirable
DB Server	SQL 2012 R2**	SQL 2014 or higher
RAM	512MB	1GB
CPU	Intel Pentium 4 2Ghz	Intel Pentium 4 3Ghz
Disk Space*	30MB	100MB

#### \*(Depends on amount of timesheet data held in SQL Server for Office Timesheets)

#### \*\*(Microsoft's Extended support for SQL Server 2012 is scheduled to end on July 12, 2022)

Browsers Currently Supported:

- Google Chrome (with latest updates)
- Mozilla Firefox (with latest updates)
- Microsoft Edge (with latest updates)
- Apple Safari (with latest updates)

### What if I don't have Microsoft SQL Server Licenses?

If you don't have Microsoft SQL Server licenses you can download and install Microsoft SQL Server Express, a free version of Microsoft SQL Server, to use with Office Timesheets.

Free to download, and free to use, SQL Server Express includes powerful features such as the SQL Server Management Studio Express, to help you easily manage your databases.

In order to use Office Timesheets with Microsoft SQL Server Express you must first download it along with SQL Server Management Studio Express from Microsoft's website. Use the following link to download the software:

#### http://www.microsoft.com/en-us/download/details.aspx?id=29062

If you install SQL Server Express on a computer other than your web server, you will need to perform the following steps:

- 1. Enable remote access open SQL Server Management Studio and go to Properties -> Connections -> Check "Allow remote connections to this server".
- 2. Set specific firewall settings for SQL Express Instructions for performing this action can be found at <a href="http://blogs.msdn.com/sqlexpress/archive/2005/05/05/415084.aspx">http://blogs.msdn.com/sqlexpress/archive/2005/05/05/415084.aspx</a>.

# **Office Timesheets On-Premise Installation Instructions**

There are two primary components to the Office Timesheets server installation—the application and the database. Both components are installed and configured in one simple installation process; and the application and the database can both be installed to the same computer.

**TIP:** We have found in testing, particularly with larger installations, that Office Timesheets' performance is greatly enhanced when the application and database are installed on two separate computers.

The Office Timesheets server components are developed using the latest Microsoft development tools and thus require Microsoft Windows-based hardware in which to operate. However, the Office Timesheets client can run inside either Microsoft Internet Explorer or Mozilla Firefox browsers. Firefox web browser compatibility allows the Office Timesheets client to run on a variety of computer operating system platforms, including both Windows and Apple Macintosh.

To install the Office Timesheets Server application:

1. On your web server, double-click on the **OTSInstaller.exe** file which you downloaded to your computer.

**Note:** The installer must be run from the computer on which you are installing Office Timesheets – your web server, in this case.

- 2. The Office Timesheets Setup Wizard will start and the **Welcome** screen will be displayed. Close all other Windows programs that are running and click **Next**.
- 3. The **License Agreement** will be displayed. Review the license agreement and click the **I agree to the terms of this license agreement** radio button, and click **Next**.
- 4. Specify whether to install only the Original program (including the blank or live database); the Sample database; and/or Mobile (timesheet interface designed for mobile devices).

Note: The original checkbox is checked by default. You cannot uncheck it.

**TIP:** We recommend that you check the **Sample** option as well so that you have a sample database to explore before configuring your blank Office Timesheets database.

Check or uncheck the **Sample** and **Mobile** options (depending on whether you would like to install them not) and click **Next**.

- 5. Choose the location in which to install Office Timesheets and click Next. You can accept the suggested location ("C:\Program Files\OTS") or you can install Office Timesheets to some other location by clicking the Change... button. The space required and the space available on the selected drive are displayed for your reference.
- 6. The Installation Wizard now has enough information to install Office Timesheets on your computer. Review the installation information. If you need to make any changes, click the **Back** button to go to the previous screens and make the required changes. Otherwise, click **Next** to continue with the installation.
- 7. Type in the names of the virtual directories for your live and sample databases (or keep the default names provided for you), and click **Next**.

Office Timesheets Setup
Select Virtual Directory Type in names of virtual directories and click Next
Select Virtual Directory
Select Sample Virtual Directory
Select Mobile Virtual Directory
OTSMobile
< <u>B</u> ack <u>Next</u> > <u>C</u> ancel

8. Select the type of authentication you would like to use—**Windows Authentication** or **SQL Server Authentication**.



**Note:** If your SQL Server is not installed on the same computer as your Web Server, you must choose **SQL Server Authentication**.

#### If choosing Windows Authentication...

1. Click on the Windows Authentication radio button, and click Next.

🕦 Office Timesheets Setup	×
<b>Configure Databases</b> Enter database server and database names.	Office Timesheets
Database Server Name	
localhost	
Database Name	Sample Database Name
OTSDB	OTSDBSample
<u> </u>	ack Next > Cancel

#### \*\*\*SQL Server Express Edition Users\*\*\*

If you are connecting to SQL Server Express Edition you will need to type in your Database Server Name using the following scheme (placing a backslash after "localhost" and typing in the actual name of your SQL Server Express installation). If you do not know the name of your SQL Serve Express Installation you can find it by opening SQL Server Management Studio.

🕵 Office Timesheets Setup	
Configure Databases Enter database server and database names.	C
Database Server Name	
Database Name	Sample Database
OTSDB	OTSDBSample

2. Type the name of the database server and the names of the blank and sample databases, and click **Next**.

Item	How to use the Item	Default Value (if any)
Database Server Name	Type the name of your database server.	localhost
Database Name	Type the name of the blank (or live) database.	OTSDB

Item	How to use the Item	Default Value (if any)
Sample Database Name	Type the name of the sample database.	OTSDBSample

3. Review the installation information. If you need to make any changes, click the **Back** button to go to the previous screens and make the required changes. Otherwise, click **Next** to continue with the installation.

#### If choosing SQL Server Authentication...

1. Select the SQL Server Authentication radio button, and click **Next**.

🖏 Office Timesheets Setup	×
Configure Databases Enter databases server, database names and log	in credentials Office
Database Server Name	
localhost	
Database Name	Sample Database Name
OTSDB	OTSDBSample
Login	
sa	
Password	
жжи	
< <u>B</u> ar	:k <u>N</u> ext> <u>C</u> ancel

2. Type the name of the database server, the names of the blank and sample databases, as well as your login name and password and click **Next**.

Item	How to use the Item	Default Value (if any)
Database Server Name	Type the name of your database server.	localhost
Database Name	Type the name of the blank (or live) database.	OTSDB
Sample Database Name	Type the name of the sample database.	OTSDBSample
Login	Type the login name needed to access the databases.	
Password	Type the password needed to access the databases.	

- 9. The installer will then create the virtual directory/directories in IIS and install the databases that you have selected.
- 10. Click **Finish** to complete the installation.

# **Accessing Office Timesheets**

Office Timesheets creates two databases for you upon installation—a sample database and a blank (or live) database.

The sample database is configured with sample users accounts, employees, time entries, etc. and is designed for you to explore the application before configuring your own live database. We highly recommend that you first use the sample database as it will get you more familiarized with the application, and provide you with a road map for configuring your live database.

The blank database or live database is for entering your live data. After using the sample database to familiarize yourself with the Office Timesheets application, you can then configure and start entering your actual or live data into the live database.

### Logging into the Office Timesheets On-Premise Edition

During installation, Office Timesheets sets up two databases for your organization-

- A sample database complete with a mock setup and sample time and expense entry data...
- A blank or live database to setup, configure and use for your actual data.

#### Accessing and logging into the Office Timesheets Sample Database

To log into the Office Timesheets Sample Database:

- 1. Open your web browser.
- 2. Type in the URL for the Office Timesheets Sample Database login page by using the following conventions http://computername/virtualdirectory (Example: http://server1/OTSSample), and press **Enter** or **Return**. You could try <u>http://localhost/OTSSample</u>.

**TIP:** Ask your systems administrator for the exact URL of the Office Timesheets Sample Database login page. Be sure to mention that the sample database is installed to the **OTSSample** directory.

3. When the Office Timesheets login screen appears, type your login details.



Depending upon the type of access you would like to have, use one of the following:

To Login As	Use	Allows You To
An Administrator	Username = admin	Do everything – create users and
	Password = 1	user groups, manage users,
		manage logins, etc. An
		administrator has all security
		rights.
A Manager	Username = manager	Enter time and approve employee
	Password = 2	timesheets.
A User	Username = user	Enter and time and/or expense
	Password = 3	sheets. This a basic user login
		profile and should be used by
		employees.

#### Accessing and logging into the Office Timesheets Live Database

To log into the Office Timesheets Live Database:

- 1. Open your web browser.
- Type in the URL for the Office Timesheets Live Database login page by using the following conventions http://computername/virtualdirectory (Example: http://server1/OTS/), and press Enter or click the Go button in your browser's address bar. You can also log into Office Timesheets from the web server computer using the following URL <u>http://localhost/OTS</u>

**TIP:** Ask your systems administrator for the exact URL of the Office Timesheets Live Database login page.

3. When the Office Timesheets login screen appears, type **Admin** as the username and **1** as the password.

**TIP:**The password '1' should only be used as a temporary password to allow you to log into the system. For reasons of security, once you log in to the system, it is advisable to change the password to something more secure.

4. Click the **Sign In** button to log into Office Timesheets.

Note: When you try to log in, if another person has already logged in using the same username that you have specified, Office Timesheets will display the following message:

Message f	rom webpage 🛛 💌
?	Someone is already logged into this user account. Would you like to log them out?
	OK Cancel

Click **OK** to log the user out or click **Cancel** to return to the login screen without logging them out.

**Note:** If you leave Office Timesheets without logging out (such as when your browser window closes with an error message, or when you go to some other web page) and then try to log in again, Office Timesheets will display the above message. This happens because you were unable to log out properly earlier. Hence, when you try to log in, Office Timesheets incorrectly thinks that you are still logged in and displays this warning message. In this situation, you should click on the **OK** button so that Office Timesheets can close the earlier session and log you in properly.

#### Accessing and logging into the Office Timesheets Mobile Browser

To log into the Office Timesheets Live Database:

- 1. From a Smartphone device, open your web browser.
- 2. Type in the URL for the Office Timesheets Live Database login page by using the following conventions http://computername/virtualdirectory (Example: http://server1/OTSMobile/), and press Enter or click the Go button in your browser's address bar. You can also log into Office Timesheets from the web server computer using the following URL <a href="http://localhost/OTSMobile">http://localhost/OTSMobile</a>)

	•	
Carrier 🔶		,
	OFFICE TIMESHEETS	
LOG IN		
Lisemame		
Osemanie		-
Password		
		_
	SIGN IN	>

TIP: Ask your systems administrator for the exact URL of the Office Timesheets Mobile login page.

3. When the Office Timesheets login screen appears, type **Admin** as the username and **1** as the password.

**TIP:** The password '1' should only be used as a temporary password to allow you to log into the system. For reasons of security, once you log in to the system, it is advisable to change the password to something more secure.

4. Click the **Sign In** button to log into Office Timesheets.

Note: When you try to log in, if another person has already logged in using the same username that you have specified, Office Timesheets will display the following message:

### Logging into the Office Timesheets On-Demand (Hosted) Version

When you create an On-Demand account, Office Timesheets sets up two databases for your organization:

- A blank or live database to setup, configure and use for your actual data; and...
- A sample database complete with a mock setup and sample time and expense entry data.

#### Accessing and logging into the Office Timesheets On-Demand Sample Database

To log into the Office Timesheets Sample Database:

1. Using your web browser, access the Office Timesheets Sample Database login page.

Note: The address of the Office Timesheets Sample Database login page has been emailed to you as part of the registration process. If you can't find this email simply call or email our office and we'll be happy to resend it to you.

2. When the Office Timesheets login screen appears, type your login details.

Depending upon the type of access you would like to have, use one of the following username/password combinations:

To Login As	Use	Allows You To
An Administrator	Username = admin	Do everything – create users and
	Password = 1	user groups, manage users,
		manage logins, etc. An
		administrator has all security
		rights.
A Manager	Username = manager	Enter time and approve employee
11 blunuger	obername manager	Enter time and approve employee
in Finnuger	Password = 2	timesheets.
A User	Password = 2 Username = user	timesheets. Enter and time and/or expense
A User	Password = 2 Username = user Password = 3	timesheets. Enter and time and/or expense sheets. This a basic user login
A User	Password = 2 Username = user Password = 3	timesheets. Enter and time and/or expense sheets. This a basic user login profile and should be used by

3. Click the Sign In button to log into Office Timesheets.

#### Accessing and logging into the Office Timesheets On-Demand Live Database

To log into the Office Timesheets Live Database:

- 1. Using your web browser, access the Office Timesheets Live Database login page.
- 2. When the Office Timesheets login screen appears, type **Admin** as the username and **1** as the password.

**TIP:** The password '1' should only be used as a temporary password to allow you to log into the system. For reasons of security, once you log in to the system, it is advisable to change the password to something more secure.

3. Click the **Sign In** button to log into Office Timesheets.

#### Accessing and logging into Office Timesheets Mobile

Office Timesheets Mobile, by default is installed to the directory "OTSMobile". Thus, to log into the Office Timesheets Mobile site from a mobile device:

- 1. Open your web browser.
- 2. Type in the URL for the Office Timesheets Live Database login page by using the following conventions http://computername/virtualdirectory (Example: http://server1/OTSMobile/), and press Enter or click the Go button in your browser's address bar. You can also log into Office Timesheets from the web server computer using the following URL <a href="http://localhost/OTSMobile">http://localhost/OTSMobile</a>)

**TIP:** Ask your systems administrator for the exact URL of the Office Timesheets Live Database login page.

3. When the Office Timesheets login screen appears, type **Admin** as the username and **1** as the password.

**TIP:**The password '1' should only be used as a temporary password to allow you to log into the system. For reasons of security, once you log in to the system, it is advisable to change the password to something more secure.

4. Click the **Sign In** button to log into Office Timesheets.

### Logging out from Office Timesheets

Once you have finished with your session of Office Timesheets, it is highly advisable to always log out from the application. To log out from Office Timesheets click the **Sign Out** button at the top left of your Office Timesheets application window.



## **The Office Timesheets Application Interface**

The Office Timesheets Application Interface consists of tabs. Each tab has a ribbon that contains one or more ribbon groups. The functions or commands of the Office Timesheets application are housed within these ribbon groups.

Tab		Function / Command	
View Sheets Import / Export Reports Prod	cess Management System Configura	tion Account Administration	
sheet Expenses Timesheet Templates	Add Task & Entry	Add Tasks     Hass Update       Add Task From Template     Copy Tasks       Re-generate Tasks     Lelete Tasks And Entries       Edit Task     Edit Task	Employee Manager
View	Time Entry	Task Ribbon Group	Approval

The Office Timesheets Application Interface consists of six tabs. Use these tabs to perform various operations while working with the Office Timesheets application.

**Note:** When you log in to Office Timesheets, depending upon the Security Policy assigned to your User Account, you may or may not be able to see or access all the tabs and commands of the application. If you cannot see some of the tabs or commands, it means that the Security Policy for your User Account does not allow access to those parts of the application. What you can see or do in Office Timesheets is controlled by the Security Policy that the Systems Administrator assigns to your account.

The following table briefly describes the various tabs:

Use this tab	To do this
View Sheets	Enter and manage time, expenses, and tasks.
Import / Export	Import data from—or export data to—other time and expense management software programs such as MS Project or spreadsheet software such as MS Excel.
Reports	View or print various summary & detail reports and modify report options.
Process Management	Manage and set up your organization's processes; manage employees and employee groups; set up a list of holidays; define task rules, approval process steps and reporting periods; set up rate tables, customize statuses etc.
System Configuration	Configure system-wide options such as how dates, time and currencies are displayed; set up the time intervals to be displayed in Timesheet View; enter contact details; set up auditing and e-mailing options; set up user accounts, security policies and password options etc.
Account Administration	View and manage your Office Timesheets licenses and account/billing information.

**Note:** Before making entries on any page in the Office Timesheets application, always wait till the page loads completely. When a page is loaded properly, the word "Done" will be displayed in the status bar of your browser.

TIP: Click the Refresh or Reload button of your browser if a page does not load properly.

**TIP:** While using the Office Timesheets application, do not use the Back and Forward buttons of your browser. Instead, always navigate using the tabs and buttons of the Office Timesheets interface.

# **Configuring Office Timesheets**

Office Timesheets administrators can use the **System Configuration** tab to configure the Office Timesheets application. Using the functions in the **System Configuration** tab, you can:

- Configure system-wide options such as how dates, time and currencies are displayed;
- Select the language to be used;
- Set up the time intervals to be displayed in Timesheet View;
- Enter information about your organization, such as its name, your contact details and your web and street address;
- Set up auditing and e-mailing options;
- Set up user accounts, security policies and password options; and
- Change your password.

**Note:** By default, system configuration is possible only by those persons who have "Administrator" level of access. Typically, only Administrators would have access to the System Configuration tab. If you are not an Administrator, though you may have access to the System Configuration tab, you may not have access to all the commands in the System Configuration tab, depending upon the settings of the Security Policy that has been assigned to your User Account.

## The System Configuration tab

The Office Timesheets configuration functions are in the System Configuration tab.



The System Configuration tab has three ribbon groups—Options, Regional Options and User Accounts—that contain the commands needed to configure Office Timesheets.

The following table describes what each of the commands in the System Configuration tab does:

Click on	То
Time Entry Options	Specify the time intervals to be displayed in Timesheet View.
Company Info	Enter information about your organization, such as its name, your contact details and your web and street address.
E-mail Account	Set up and test your e-mailing settings.
Auditing	Enable or disable audit trails, or clear all audit trails.

Click on	То
Options	Set up system-wide regional specific options such as how dates, time and currencies are displayed, and select the language to be used.
Change Password	Set or change your password.
User Accounts	Set up user accounts for your employees so that they can use <b>Office Timesheets</b> .
Security Policies	Set up system-wide security policies. Assign policies to users or groups of users so as to control access to the different areas of the <b>Office Timesheets</b> application.
Password Options	Specify the minimum and maximum number of characters allowed in a password and whether or not passwords require a combination of numbers and characters.

### **Setting Time Entry Options**

Office Timesheets has been designed to support all international date formats, time formats, currencies and languages. Thus, users from anywhere around the world can use Office Timesheets irrespective of the language, currency, date and time formats used in that part of the world.

To set or change the Time Entry Options:

- 1. Click on Time Entry Options in the System Configuration tab.
- 2. Enter appropriate values for the various items.
- 3. Click the **Save** button to save the changes you have made on the screen to change your personal time entry options.
- 4. Click the **Save as Default** button if wish to make these settings the default settings for all users.

Sign Out = View Sheets Import / E	xport Rep	oorts	Process Manageme	ent System C	Configuration	
Company In Company In E-mail Accor Time Entry Options	fo punt Opti	ions	Change Password	User Account Security Poli	nts cies ptions	
Options	Regional	Options	User	Accounts		
Time Entry Options						
Default start time for time entry	8:00 PM	Time	e spent only on Times	heet View		
Day View time intervals in minutes	30	Tim	e spent format	neer view	Hours/minutes	-
Day View first time	8:00 AM	Sho	w totals by employee I	Penorting Period		
Day View last time	7:00 PM	Ono	w totals by employee i	tepolangi enou		
buj new last and						
					-	

The following table describes the various items found on the **Time Entry Options** page:

Item	How to use the Item	Default Value (if any)

Item	How to use the Item	Default Value (if any)		
Default start time for time entry	Enter the time to be used for the start time in the time entry dialog box.	08:00 AM.		
Day View time intervals in minutes	Enter the number of minutes that you want <b>Office</b> <b>Timesheets</b> to use for the interval between two time slots on the <b>Day View</b> screen.	30 minutes.		
Day View first time	Enter the time to be used for the first time slot in the <b>Day View</b> screen.	08:00 AM.		
Day View last time	Enter the time to be used for the last time slot in the <b>Day</b> 06:00 <b>View</b> screen.			
Time spent only on Timesheet View	Check this check box to enable the <b>Time Spent Only</b> field in the <b>Time Entry</b> dialog box when an employee opens it from the <b>Timesheet View</b> screen. Uncheck this check box to disable the <b>Time Spent</b> <b>Only</b> field in the <b>Time Entry</b> dialog box when an employee opens it from the <b>Timesheet View</b> screen. <b>Note:</b> If you check this check box, the <b>Start time</b> and <b>Stop time</b> fields in the <b>Time Entry</b> dialog box will be hidden when opened from the <b>Timesheet</b> <b>View</b> screen.			
Time spent format	Select the format to be used for the <b>Time spent</b> field in the <b>Time Entry</b> dialog box, from this drop-down list. The drop-down list contains two values—"Decimal" and "Hours/minutes". If you select "Decimal", the time will have to be entered as a decimal value. Eg: If you've spent two and a half hours, you would have to enter it as 2.5, instead of 2:30.	Hours/minutes.		
Show totals by employee Reporting Period	Use this checkbox to specify what totals should be displayed in the <b>Task Totals</b> and <b>Sheet Total</b> on your Timesheet. If you <b>uncheck</b> this checkbox, the Task Totals and Sheet Total on your Timesheet <b>will display the totals for only</b> <b>the period that you are currently viewing</b> in your Timesheet. For example, if you have set up your timesheet to display a week at a time, the Task Totals and Sheet Total will display the total for the week. If you <b>check</b> this checkbox, the Task Totals and Sheet Total <b>will display the total for your Reporting Period</b> , <i>irrespective of the period that you are currently viewing in</i> <i>your Timesheet</i> . For example, if your Reporting Period is a			

Item	How to use the Item	Default Value (if any)
	month, the Task Totals and Sheet Total will display the total for the month, even if you have set up your timesheet to display a week at a time.	
	See <u>Managing Time and Expense Details</u> for more information about Timesheets.	
	Click the <b>Save</b> button to save any changes you make to the page. Click the <b>Save as Default</b> button if wish to make these settings the default settings for all users.	
The Save and Save as Default buttons	<b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page.	
	<b>TIP:</b> If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

### **Setting Company Information**

Use the Company Info command from the Options ribbon group within the System Configuration tab to enter the name, web address and contact details of your organization. The information that you specify here will appear on your reports and invoices.

To set or change the Company Information:

- 1. Click on **Company Info** in the **System Configuration** tab.
- 2. Enter the name, web address, contact and address details of your organization.
- 3. Select and Upload your company logo (image cannot be larger than 250 x 55 pixels).
- 4. Click the **Save** button to save the changes you have made on the screen.

View Sheets Import / Export	Reports	Process Management	System Configuration	Account Administration
Time Entry Options	© Options	Change Password	User Accounts Security Policies Password Options	
Options	Regional Options	User Accou	nts	
Company Information				
Company name		Web add	iress	
Contact details		Address Street City State / Provin Zip / Postal o Country / Res	details	
Company Logo Browse_	Upload	Reset	Clea	r Reset Save

The following table describes the various items found on the Company Info page:

Item	How to use the Item	Default Value (if any)
Company name	<b>Company name</b> Enter the name of your organization.	
Web address	Enter the web address of your organization.	
Contact Details	Enter the contact details of a person in charge of Accounts Receivables. Note: The items in the Contact Details panel are all optional. It is not necessary to provide contact details. However, if you <i>do</i> provide these details, they will appear on your invoices along with your company name and address.	
Title	Select the title of the person, such as Mr., Ms., Miss etc., from the drop-down list.	
First	Enter the first name of the contact person.	

Item How to use the Item		Default Value (if any)	
Middle	Enter the middle name or middle initials of the contact person.		
Last	<i>Last</i> Enter the last name or surname of the contact person.		
Suffix	Select the suffix for the name, such as Jr., Sr., I, II etc. from the drop-down list. <b>TIP:</b> If the suffix you want to use is not in the drop- down list, add the suffix to the last name, and do not select anything from the suffix drop-down list.		
Phone	Enter the telephone number of your organization.		
Fax	Enter the fax number of your organization.		
E-mail	Enter the your organization's e-mail address.		
Address Details	Enter your organization's postal address.		
Street	Enter your organization's street address. While typing the address, press the <b>Enter</b> key if you need to use more than one line.		
City	Enter the name of the city.		
State / Province	Enter the name of the state or province.		
Zip / Postal Code	Enter the zip or postal code of your organization.		
Country / Region	Enter the country or region.		
Company LogoCustomize your Timesheet interface by uploading your company logo. The logo image can be no larger than 250 x 55 pixels.			
The Clear button	Click the <b>Clear</b> button to delete all the values from the fields on the page.		
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.		
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page.		

Item	How to use the Item	Default Value (if any)
	<b>TIP:</b> If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

#### Customizing the Office Timesheets interface with your company logo

When you upload your company logo from within the Company Info form the logo will appear to all users in top left portion of the Office Timesheets interface.

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Lookoti)Software	View Sheets Impo	rt / Export Report	s Process Managemen	nt System Cor	figuration	Account Admin
Timeshe	mesheet Temp	Day Time Clock lates	Add Time Entry	Add Task & Entry Timer On Timer Off Delete Time Entry	Add Tasks         Add Task f         Add Task f         Re-generation         Edit Task	rom Template te Tasks ( Tas
Timesheet	View					
Aston C. Tara			• • • 08/12/2007	Mon	Tue	Wed
Client	Project	Event	Activity	06 Aug	07 Aug	08 Aug
	1		Maternity Leave	1		
	1		Medical Leave	8		
	1		Personal Time	1		
	1		Sick Leave			
	1		Vacation			
Addison Labs, Inc.	AccountStar	Business Analysis		4:0	0 3:00	2:00
Addison Labs, Inc.	AccountStar	Development	Feature Coding		4:00	6:00
Addison Labs, Inc.	AccountStar	Development	Feature Testing	4:0	0 1:00	
Addison Labs, Inc.	Greenlite Help Des	k i				

### **Configuring E-mail Settings**

Office Timesheets can send notification e-mails to employees and managers. In order to be able to send these e-mails, Office Timesheets needs to connect to your email server.

Click on the **E-mail Account** icon in the **Options** ribbon group within the **System Configuration** tab to specify the settings of the e-mail account that Office Timesheets should use when sending the notification e-mails.

**TIP:** If you want Office Timesheets to send emails in the name of "Office Timesheets Administration", for example, you will first have to create an account with that name on your e-mail server and then fill in the details of that account on this page. Alternatively, if you want to send the emails in the name of one of your existing employees, then there is no need to create a separate account. Just enter the details of that employee's e-mail account on this page.

To specify or change the E-mail Account settings:

- 1. Click the **E-mail Account** icon in the System Configuration tab.
- 2. Enter your e-mail account connection details.
- 3. Click the **Test Settings** button to test the settings and ensure that the account has been set up properly.
- 4. Click the **Save** button to save the changes you have made in this screen.

Sign	Out =			
View	w Sheets	Import / Expor	t Reports	Process Managen
Time Entry C	Options	Company Info E-mail Account Auditing	Options	Change Password
	Options		Regional Options	Use
E-mail Co	onfiguration			
From	admin@office	timesheets.c		
Server	mail.officetime	sheets.com		
Port	25			
Login	nin@officetime	sheets.com		
Password	•••••			
Use SSL				
Test Settin	gs Cle	ar Rese	t Save	

The following table describes the various items found on the E-mail Configuration page:

Item	How to use the Item	Default Value (if any)
From	Enter the name, such as "Office Timesheets Administration", that should appear in the "From" field on the email alerts and notifications sent to the employees. The name that you specify here will appear as the sender's name in the emails sent by <b>Office Timesheets</b> .	
Server	Enter the name of your outgoing mail (SMTP) server.	
Port	Enter the TCP port number to be used for sending the emails. Most servers use port 25 for sending e-mails.	25
Login	Enter the login name that <b>Office Timesheets</b> should use to connect to the outgoing mail server.	
Password	Enter the password that <b>Office Timesheets</b> should use to connect to the outgoing mail server.	

Item	How to use the Item	Default Value (if any)
The Test Settings button	Click the Test Settings button to check whether Office Timesheets can connect to your outgoing mail server. Office Timesheets will try to connect to your outgoing mail server and then display a message informing you 	
The Clear button	Click the <b>Clear</b> button to delete all the values from the fields on the page and restore the default value for the Port field.	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page without clicking the <b>Save</b> button.	
Use SSL	Check this box if your mail server requires an encrypted SSL connection.	

### **Setting Auditing Options**

Office Timesheets has a facility of database auditing. If Auditing is enabled, Office Timesheets can track all the changes made to its database by users.

According to DCAA (Defense Contract Auditing Agency), SOX (Sarbannes Oxely), FMLA (Family Medical Leave Act), and other government regulatory and/or legal compliance guidelines, standards and/or procedures, organizations that track time—particularly those organizations under government contract such as defense contractors—are required to maintain an audit trail of the changes made to an employee's timesheet. Thus, Office Timesheets' Auditing feature has been designed for such purposes.

The most common regulatory guidelines in this area are those set forth by the United States Defense Contract Audit Agency (DCAA). Here are the DCAA's primary requirements for time reporting:

- According to the DCAA requirements only the employee can log his/her labor. Thus, we track data entry by login name.
- An Audit trail report has to be prepared that includes the complete history of the changes made to a user's timesheet after initial submission. Details include items such as the modified date, row affected, field affected, date affected, initial value, changed value, and change comments. Thus, we have put a verifiable audit trail process in place that collects all initial entries and subsequent changes.

When the Auditing feature is enabled, Office Timesheets will track complete add/edit/delete history for entries in an organization's Office Timesheets database.

**Note:** By default, the Auditing feature is not enabled because auditing typically puts a higher workload on Office Timesheets' database as it has to run multiple routines with each entry to the database, thus affecting the performance of the database.

To set or change Auditing Options:

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- 1. Click the Auditing icon in the System Configuration tab.
- 2. Select the required options to enable, disable or clear auditing.
- 3. Click the **Save** button to save the changes you have made on this screen.



The following table describes the various items found on the Auditing Options screen:

Item	How to use the Item	Default Value (if any)
Enable Auditing	Click on the radio buttons to enable or disable auditing.	Disable Auditing
Enable Auditing	Select this radio button to enable or start auditing. Once you enable auditing, Office Timesheets will keep track of all changes made to the timesheets, until you disable auditing.	
Disable Auditing	Select this radio button to disable or stop auditing.	

Item	How to use the Item	Default Value (if any)
Clear Auditing	Check the check box, and select or enter a date in the <b>Clear Auditing through</b> date field, to clear all auditing tracks upto the selected date.	
Clear Auditing	Check this check box to clear all auditing tracks upto a specified date.	Unchecked
Clear Auditing through	Enter a date or select a date using the Date Picker button ( ). Office Timesheets will delete all auditing records up to this date.	A date that is 30 days
	<b>Note: Audit Start, Audit Stop</b> , and <b>Audit Clear</b> entries are never removed from the auditing database, even when you clear the Audit tracks.	current date
The Clear button	Click the <b>Clear</b> button to delete all the values from the fields on the page, and reset them back to their default values.	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the options back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. NOTE: If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. TIP: If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

#### **Implementation of Auditing in Office Timesheets**

Office Timesheets uses a special auditing database to keep track of timesheet entries. If Auditing is enabled, whenever users add, edit or delete entries in the timesheet, Office Timesheets creates a copy of that entry in the auditing database. This copy is called an audit entry and is an identical copy of the original entry. Each audit entry also contains an audit status. The audit status describes the type of change the users make to an entry. For example, Office Timesheets assigns a status of Audit Create for all new audit entries.

There are six audit statuses that Office Timesheets can assign to an audit entry. The six audit statuses are described in the following table:

Audit Status	What it means	When it is used

Audit Status	What it means	When it is used
Audit Start	Indicates the start of audit tracking.	When the systems administrator enables auditing, Office Timesheets creates an audit entry with an audit status of <b>Audit Start</b> .
Audit Stop	Indicates the end of audit tracking.	When the systems administrator disables auditing, an audit entry is created with an audit status of <b>Audit Stop</b> .
Audit Clear	Marks the time when the audit track is cleared.	When the systems administrator clears the auditing track, all audit entries upto the <b>Clear Auditing through</b> date (except for <b>Audit Start</b> , <b>Audit Stop</b> and <b>Audit Clear</b> entries) are deleted from the auditing database, and an audit entry is created in the auditing database with an audit status of <b>Audit Clear</b> .
Audit Create	Indicates the creation of a new entry.	Whenever a user creates a new entry in the timesheet, Office Timesheets creates a copy of the entry and assigns it an audit status of <b>Audit Create</b> .
Audit Change	Indicates a change to an entry in the timesheet.	Whenever a user modifies an existing entry in the timesheet, Office Timesheets creates a copy of the changed entry and assigns it an audit status of <b>Audit Change</b> .
Audit Delete	Indicates that an entry has been deleted from the timesheet.	Whenever a user deletes an entry from the timesheet, Office Timesheets copies the entry to the audit database and assigns it an audit status of <b>Audit Delete</b> .

**Viewing and Printing Auditing Reports** 

You can view and/or print Auditing reports by using the audit report templates within the Office Timesheets Detail Reports list. See **Detail Reports** for further information.

Sign Ou	t =					
View S	heets	Import	/ Export	Reports	Process Mana	gemen
New	Detail F	Reports				
Summary Report	Detail	Report				
Detail Repor	t List					
If this is your findefined detail List. To do this boxes in the "A Category Auc	rst time u report ten dd Defau dting	sing Det nplates to *Add De ilt Report	ail Reports yo o your Office faults" buttor ts" dialog boy	ou will nee Timesheet n below; se c; and click	d to add the pre- s Detail Report dect all check OK.	
Audit Stop/Start	: Audit				Add Defaults	
Time Spent Aud	it				Rename	
Timesheet Audr	г керогт				Delete	
					Run	
					Load	
					Сору	
					Add Report	

### **Changing Regional Settings**

Different countries use different languages and different formats for displaying date, time and currency figures. Office Timesheets allows you to change the display of date, time and currency fgures so that it matches with your regional settings. You can also change the language used for the prompts and messages that are displayed by Office Timesheets.

**Note:** These settings can be applied to individual users, teams and/or groups of employees and enforced through Office Timesheets Security Policies.

To change the Regional Settings:

- 1. Click **Options** icon in the **Regional Options** ribbon group from the **System Configuration** tab.
- 2. From the drop-down lists, select the date, time and currency format that you would like to use.
- 3. Select a language from the Language drop-down list.
- 4. Finally, click **Save** to save your settings.

	Sign Out 🤿				
V	View Sheets	Import / Export	Reports	Process Management	System (
Time	Entry Options	Company Info E-mail Account Auditing	Options	Change Password	User Accou Security Pol Password C
	Options		Regional Options	User Acco	ounts
Reg	gional Options				
In Date Time Curre Curre Positi Nega	ternational/Region Display Display ency / Time Interval ency Symbol ive Currency Form tive Currency Form	Al Support MM/dd/y hh:mmt  S at \$1.1 (\$1.1)		anguage uage English (US) 💌	
		Copy S	Save as Default	Save	

The following table provides more details about the components of the Regional Options screen:

Item	How to use the Item	Default Value (if any)
Date Display	From the drop-down list, select how you would like dates to be displayed in Office Timesheets.	MM/dd/yyyy
Time Display	From the displayed in Office Timesheets. The <b>Time</b> Display displayed in Office Timesheets. The <b>Time</b> Display displayed in Office Timesheets. The <b>Time</b> Display displayed in Office Timesheets. The <b>Time</b> 	hh:mm tt
Currency /Time Interval Display	From the drop-down list, select how you would like currency amounts / time intervals to be displayed in Office Timesheets. You can specify whether to use a comma (,) or a decimal point (.)	decimal point (.)
Language	Select the language you would like to use within Office Timesheets from the drop-down list.	English (US)
The Copy button	Click the <b>Copy</b> button to copy the current Regional Option settings and assign them to all the other users, or any one particular user. Note: Only an administrator can assign the regional option settings to other users.	
The Save as Default button	Click the <b>Save as Default</b> button to save the settings as	

Item	How to use the Item	Default Value (if any)
	the default settings for Office Timesheets. These settings will then be set for all the users of Office Timesheets who have not already saved their own settings. <b>Note:</b> Only an administrator can save the settings as the default settings.	
The Save and Save as Default buttons	Click the <b>Save</b> button to save the settings for you (the currently logged in user) alone. Office Timesheets will use these settings whenever you are logged in. For other users, Office Timesheets will use the default formats to display date, time and currency values (unless any user has specifically changed his/her regional options). If you wish for your current settings to be the default settings for all other users click the <b>Save as Default</b> button. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button or the <b>Save as Default</b> button, the changes you have made will be discarded. Therefore, remember to always click one of these two buttons before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page button or the <b>Save</b> button or the <b>Save</b> button.	

#### **Assigning Regional Options Settings to Other Users**

Normally, a user can change the Regional Options settings to suit his/her requirements. However, if a user has not been given access to the Regional Options Settings screen, the Office Timesheets administrator can assign the settings for that user by using the **Copy** button in the Regional Options screen. The systems administrator can also use the **Copy** button to assign the current Regional Option settings to all the users.

To assign the Regional Option settings to other users:

- 1. Click on the **Options** icon in the **System Configuration** tab.
- 2. Select the required values from the date, time, currency display and language drop-down lists.
- 3. Click the **Copy** button.

The Copy preferences dialog box will appear on your screen.

OK Cancel	
Actions	
Options	
Employees	
{AII}	
Replace preferences	

4. By default the system will assign the settings to all users. However, to assign the settings to a particular employee or an employee group, click the button.

✓ ×	
OK Cancel	
Actions	
Group	
{All}	<ul><li>✓</li></ul>
- Names	
{AII}	~
Anderson A Brian	
Anderson A. Lloyd	
Anderson L. Thomas	
Aston C. Tara	=
Brown H. Alan	
Canon C Cedrik	
Clark K. Lauren	
Cooper C. James	
Costa E. Matthew	
Fabiano H. Ryan	
Freeman A Kelly	
Garcia R James	
Jessup S. Kichard	
Rapian S. Linosay	
Status Active	

- 5. Select the user's name from the Names list in the Select element dialog box and click the **OK** button to return to the Copy preferences dialog box.
- 6. In the Copy preferences dialog box, check **Replace preferences**; and click **OK**.

Note: If Replace preferences is unchecked, Office Timesheets will assign the new settings only if the user has not already set his/her own Regional Option settings.

However, if **Replace preferences** is checked, Office Timesheets will assign the new settings to the user, regardless of the user's previous Regional Options settings. The new settings will override and replace the user's existing Regional Option settings (if any).
## **Setting Up User Accounts**

All organizations using Office Timesheets must assign a User Account to each employee that will access the Office Timesheets application. The total number of user accounts allowed by Office Timesheets License Activation Manager will depend upon how many User Account licenses have been purchased from Lookout Software. For example, if an organization purchases 50 licenses from Lookout Software, the organization will get a license code for Office Timesheets that will allow 50 User Account assignments.

### **Understanding User Accounts**

An Office Timesheets login consists of two required elements: the Employee's name and a Security Policy. An Office Timesheets administrator manually populates the Office Timesheets database with employee names or imports employee data from another application or from Active Directory.

When creating a User Account for an employee, the system administrator must assign a Security Policy to the User Account. By default, Office Timesheets provides three default Security Policies—Administrator, Manager and Employee. Each Security Policy provides an employee with a collection of access rights to the various areas of Office Timesheets.

**Note:** As a administrator, you can use the starter Security Policies as they are, edit them to suit your requirements or create entirely new Security Policies from scratch.

The administrator uses the User Accounts screen to add and maintain User Accounts in Office Timesheets. The User Accounts screen provides values that allow the system administrator to quickly view:

- The total number of User Accounts licenses purchased;
- The total number of User Accounts assigned or in use; and
- The total number of User Accounts available (not currently in use).



The main component of the User Accounts screen is a list box containing a list of all the currently defined user accounts. For each user account, the list box displays the account name as well as the name of the Security

Policy that has been applied to the user account. The following table describes the rest of the User Accounts screen:

Item	How to use the Item	Default Value (if any)
License and user statistic	This panel displays the total number of User Accounts licenses purchased, the total number of accounts assigned or in use and the total number of accounts available.	
The Add button	Click the <b>Add</b> button to add a new user account. When you add a User Account, the Total number of User Accounts assigned will increase by one and the Total number of User Accounts available will decrease by one. <b>Note:</b> Office Timesheets will not allow you to add a User Account if the number of User Accounts assigned is equal to the maximum number of User Account licenses that you have purchased.	
The Open button	Select a user name from the <b>User Account</b> list and click the <b>Open</b> button to view/edit the details of a user account.	
The Delete button	Select a user name from the <b>User Account</b> list and click the <b>Delete</b> button to delete a user account.	

### Viewing or Changing User Account details

To view or change the details of a User Account:

1. Click on the User Accounts icon in the System Configuration tab.

The User Accounts screen will be displayed.

View Sheets	Import / Export	Reports	Process Manager	nent	System Configuration
	Company Info	0	3	100 U	Iser Accounts
Time Entry Options	Auditing	Options	Change Password		assword Options
Options	R	egional Options	User	Account	8
User Accounts					
Account Name	Security Policy		Add		
Anderson A Brian	Administrato	ir	Open		
Anderson L. Thomas	Employee				
Aston C. Tara	Manager		Delete		
Cooper C. James	Employee		Delete		
Freeman A Kelly	Manager				
Kaplan S. Lindsay	Manager				
McGregor D. Jena	Employee				
Miller M. James	System Adm	in			
sa	Administrato	r			
Shawn J. Christopher	Sample				
Spikes T. Jacob	Employee				
Wellman O. Dan	System Adm	in			
- License and user stati	stic				
Total User accounts licens	ses: 28				
Total User accounts assig	ned: 12				
rotal Oser accounts availa	ible. To				

2. Select a user name and click the **Open** button.

The details of the selected user will be displayed in the User Account dialog box.

User Account		X
Save & Close	Save & New Delete Cancel	
	Actions	
Employee	Spikes T. Jacob	
Security Policy	Employee	~
Change Password		
Password		
Confirm Password		

3. Make any desired changes to the User Account and do one of the following:

Do this	То
Click the <b>Add Employee</b> button	Add a new employee record into the system.
Click the <b>Delete</b> button	Delete the User Account.
Click the Save & New button	Save this User Account and start creating a new User Account.
Click the Save & Close button	Save this User Account and return to the <b>User Accounts</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the User Account dialog box	To return to the <b>User Accounts</b> screen without saving the new User Account.

#### **Resetting a User's Password**

In case a user forgets his/her password, the Systems Administrator can reset the user's password and assign a new password to the user.

**Note:** As a Systems Administrator, you need to use this procedure for resetting the password only when a user has lost or forgotten his/her password. At other times, you can allow users to directly change their passwords, by allowing access to the Change Password command / function of the System Configuration tab. To allow users to change their passwords, you would need to provide this access in the Security Policy assigned to the user. (See Making Changes to a Security Policy and Changing your Login Password for more information.)

To reset a user's password:

### 1. Click on User Accounts icon in the System Configuration tab.

The User Accounts screen will be displayed.

Company Info Time Entry Options Options Auditing Options Regional Options Regional Options Regional Options User Accounts User Accounts User Accounts User Accounts User Accounts User Accounts User Accounts User Accounts User Accounts User Accounts Delete Dele	View Sheets	Import / Export Rep	orts Process Manag	ement System Configuration
User Accounts Account Name Security Policy Add Anderson A Brian Administrator Anderson L Thomas Employee Aston C. Tara Manager Cooper C. James Employee Freeman A Kelly Manager Kaptan S. Lindsay Manager Kaptan S. Lindsay Manager McGregor D. Jena Employee Welly Manager Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin	Time Entry Options	Company Info E-mail Account Auditing Regional	ns Change Passwor	User Accounts     Security Policies     Geservery Policies     Security Policies     Accounts
Account Name Security Poloy Add Anderson A Brian Administrator Open Anderson A Brian Administrator Open Addorson L Thomas Employee Cooper C. James Employee Freeman A Kelly Manager Kaplan S. Lindsay Manager Kaplan S. Lindsay Manager Kaplan S. Lindsay Manager McGregor D. Jana Employee Freeman A Kelly Manager Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin - License and user statistic - Total User accounts assigned: 12 fotal User accounts available: 16	User Accounts			
Anderson A Brian Administrator Open Anderson L Thomas Employee Aston C. Tara Manager Cooper C. James Employee Preeman A Kelly Manager Kapian S. Lindsay Manager McGregor D. Jena Employee Miller M. James System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin	Account Name	Security Policy	Add	
Anderson L. Thomas Employee Aston C. Tara Manager Cooper C. James Employee Freeman A Kelly Manager Kaplan S. Lindsay Manager Miller M. James System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin - License and user statistic Total User accounts assigned: 12 Total User accounts available: 16	Anderson A Brian	Administrator	Open	
Aston C. Tara Manager Delete Cooper C. James Employee Freeman A Kelly Manager Kaplan S. Lindsay Manager McGregor D. Jena Employee Miler M. James System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin  — License and user statistic — Total User accounts assigned: 12 fotal User accounts asaliabel: 16	Anderson L. Thomas	Employee		
Cooper C. James Employee Freeman A Kelly Manager Kaplan S. Lindsay Manager McGregor D. Jena Employee Miller M. James System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin - License and user statistic - License and user statistic - Cital User accounts assigned: 12 fotal User accounts available: 16	Aston C. Tara	Manager	Delete	
Freeman A Kelly Manager Kaplan S. Lindsay Manager Miller M. James System Admin sa Administrator Shavn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin - License and user statistic Total User accounts assigned: 12 Total User accounts available: 16	Cooper C. James	Employee	Delete	
Kapian S. Lindsay Manager McGregor D. Jena Employee Miler M. James System Admin sa Administator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin — License and user statistic — Total User accounts assigned: 12 fotal User accounts asalipad: 12	Freeman A Kelly	Manager		
McGregor D. Jena Employee Miller M. James System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin - License and user statistic - License and user statistic Total User accounts assigned: 12 Total User accounts available: 16	Kaplan S. Lindsay	Manager		
Miller MJames System Admin sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin — License and user statistic Total User accounts assigned: 12 Total User accounts assilaed: 12	McGregor D. Jena	Employee		
sa Administrator Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin — License and user statistic Total User accounts assigned: 12 Total User accounts asaliable: 16	Miller M. James	System Admin		
Shawn J. Christopher Sample Spikes T. Jacob Employee Wellman O. Dan System Admin	sa	Administrator		
Spikes T. Jacob Employee Wellman O. Dan System Admin  License and user statistic  Total User accounts assigned: 12 Total User accounts available: 16	Shawn J. Christopher	Sample		
Wellman O. Dan System Admin  — License and user statistic — Total User accounts assigned: 12 Total User accounts available: 16	Spikes T. Jacob	Employee		
- License and user statistic Total User accounts assigned: 12 Total User accounts asaligned: 12 Total User accounts available: 16	Wellman O. Dan	System Admin		
License and user statistic Total User accounts assigned: 12 Total User accounts assigned: 12 Total User accounts available: 16				
Total User accounts licenses: 28 Total User accounts assigned: 12 Total User accounts available: 16	License and user sta	tistic		
Total User accounts assigned: 12 Total User accounts available: 16	Total User accounts licer	nses: 28		
	Total User accounts assi Total User accounts avai	igned: 12 Iable: 16		
	rotar user accounts avai	lable. To		

2. Select a user name and click the **Open** button.

The details of the selected user will be displayed in the User Account dialog box.

Save & Close	Save & New Delete Cancel Add Employee	
Employee	Spikes T. Jacob	
Security Policy	Employee	~
Change Password		
Password		
Confirm Password		

3. Check the **Change Password** check box to activate the Password and Confirm Password text boxes.

**Note:** Office Timesheets will not allow you to type anything in the Password and Confirm Password text boxes, unless you first check the Change Password check box.

- 4. Type a new password for the user, in the **Password** field.
- 5. Re-type the password in the **Confirm Password** field.
- 6. Click the **Save & Close** button to save the changes and return to the User Accounts screen.
- 7. Inform the user about the new password. The user should now be able to log in using the new password.

#### **Deleting a User's Account**

To delete a User Account:

1. Click on the **User Accounts** icon in the **System Configuration** tab.

The User Accounts screen will be displayed.

Time Entry Options	Company Info E-mail Account Auditing	Options tegional Options	Change Password User	Security Policies
User Accounts				
Account Name Anderson A Brian Anderson L Thomas Aton C. Tara Cooper C. James Freeman A Kelly Kaplan S. Lindsay Miller H. James Sa Shawn J. Christopher Spikes T. Jacob Wellman O, Dan	Security Policy Administrato Employee Manager Employee System Adm Administrato Sample Employee System Adm	y or or or	Add Open Delete	
<ul> <li>License and user stati</li> <li>Total User accounts licen:</li> <li>Total User accounts assigned</li> <li>Total User accounts available</li> </ul>	istic ses: 28 jned: 12 able: 16			

2. Select a user name and click the **Delete** button.

Dpen rosoft Internet Explorer
rosoft Internet Explorer
Are you sure you wish to delete the following item/s2
Are you sure you wish to delete the following item/s?
Are you sure you wish to delete the following item/s?
4
OK Cancel

3. Click **OK** to delete the user's account.

#### OR

Click **Cancel** if you do not wish to delete the account.

When you delete a User Account, the **Total User Accounts assigned** will decrease by one and the **Total accounts available** will increase by one.

#### **Changing your Password**

**Note:** To be able to change your password, you need to have access to the Change Password command / function of the System Configuration tab. If you do not have access to the Change Password command, ask your administrator to assign a new password for you. The administrator can reset your password and assign a new password using the **User Accounts** dialog box. (See Resetting a User's Password for more details.)

To change your password:

1. Click on Change Password in the System Configuration tab.

The Change Password screen will be displayed.

View Sheets	Import / Export	Reports	Process Managem	ent System Config	uration
Time Entry Options	Company Info E-mail Account Auditing	© Options	Change Password	User Accounts Security Policies Password Options	
Options		Regional Options	User	Accounts	
Change Password					
Current password:	•••••				
New password:					
Confirm new password:	•••••				
			Save		

- 2. Type your current password in the **Current password** field.
- 3. Type your new password in the **New password** field.
- 4. Re-type your new password in the **Confirm new password** field.
- 5. Click the **Save** button to change your password.

**NOTE:** If you move to some other page before clicking the Save button, the changes you have made will be discarded. Therefore, remember to always click the Save button before you move away from the page.

TIP: If you do not want to save your changes, move to some other page without clicking the Save button.

## **Controlling Access with Security Policies**

You can limit or control access to the various features of Office Timesheets by using Security Policies. Security Policies determine what an Office Timesheets user can see and/or do within the Office Timesheets application.

### **Understanding Security Policies**

Security Policies within Office Timesheets are a collection/grouping of security rights, which are assigned to one or more Office Timesheets users. Security Policies determine what an Office Timesheets user can see and/or do within the Office Timesheets application.

**Note:** Office Timesheets will allow the creation of an unlimited number of Security Policies, but a user can only be assigned one Security Policy.

By default, Office Timesheets provides three default Security Policies—Administrator, Manager and Employee. Each Security Policy provides an employee with a different level of security or access rights to the various areas of Office Timesheets.

**Note:** As an administrator, you can use the starter Security Policies as they are, edit them to suit your requirements or create new Security Policies from scratch.

The Security Policies screen lists all the Security Policies that currently exist in the Office Timesheets database. From this screen, an Office Timesheets administrator can create new Security Policies, and edit or delete existing Security Policies.

You can create a new Security Policy or make changes to an existing policy using the Security Policies dialog box (which is accessible when you click the Add or Open button in the Security Policies screen).

Administrators can use Security Policies to control end users' access to every aspect of Office Timesheets. Thus, administrators can determine precisely how Office Timesheets appears to the end user. With Security Policies you can:

- Control timesheet View Criteria.
- Control access to the tabs that a user can access.
- Control access to the Ribbon Groups within a tab that a user can access.
- Control access to the Commands or Functions within a Ribbon Group.
- Specify the start-up view for a user or group of users.
- Specify the items that a user or group of users can add, edit or delete.
- Control access to task-related activities.
- Control access to entry-related activities.
- Specify whether a user or group of users can make use of locks or override locks.
- Enforce the time entry options in the Timesheet View for a user or group of users.
- Enforce the regional and language options in the Timesheet View for a user or group of users.

**TIP:** Time entry options and regional and language options can either be set by individual users (if they are given access to the relevant areas of the System Configuration tab), or can be enforced via the Security Policy assigned to the user.

When these options are enforced via the Security Policy assigned to a user, he/she will no longer be able to change the settings (even if the user has access to the System Configuration tab). As long as the settings are enforced via the Security Policy, the options that have been enforced will appear disabled or grayed out in System Configuration tab.

Click on the Security Policies icon in the System Configuration tab to manage your security policies.



The main component of the Security Policies screen is a list box containing a list of all the currently defined Security Policies. The following table describes the rest of the Security Policies screen:

Item	How to use the Item	Default Value (if any)
The Add button	Click the <b>Add</b> button to add a new Security Policy.	
The Open button	Select a Security Policy from the <b>Security Policies</b> list and click the <b>Open</b> button to view/edit the details of a Security	

Item	How to use the Item	Default Value (if any)
	Policy.	
The Delete button	Select a Security Policy from the <b>Security Policies</b> list and click the <b>Delete</b> button to delete a Security Policy.           Note: Office Timesheets will not allow you to delete a Security Policy that is in use. You can only	
	delete a Security Policy if it has not been applied to any user account.	

## **Using Security Policies**

Security Policies within Office Timesheets are a collection/grouping of security rights, which are assigned to one or more Office Timesheets users. Security Policies determine what an Office Timesheets user can see and/or do within the Office Timesheets application.

**Note:** Though Office Timesheets allows the creation of an unlimited number of Security Policies, at any given time, you can assign only one Security Policy to a particular user.

Since Security Policies determine what an Office Timesheets user can see and/or do within the Office Timesheets application, they provide a convenient way to assign rights to a team of employees on a "need-to-know" basis. For example, most employees do not need most of Office Timesheets tabs and functions.

However, a manager may need a different level of access as compared to an employee. Managers may need access to the report creation and process management areas of Office Timesheets, but not the System Configuration tab.

Once you have determined what a user needs to see and/or do within Office Timesheets, you can create separate policies for different types of users, or different groups of users.

You can then assign the policies to the users (or groups) using the User Accounts dialog box. (See Adding a New User Account for more details.)

## **Creating a New Security Policy**

Security Policies within Office Timesheets are a collection/grouping of security rights, which are assigned to one or more Office Timesheets users. Security Policies determine what an Office Timesheets user can see and/or do within the Office Timesheets application.

Office Timesheets includes three default Security Policies—Administrator, Manager, and Employee. You can use these starter Security Policies as they are, edit them to suit your requirements or create new Security Policies from scratch.

To create a new Security Policy:

1. Click on Security Policies in the System Configuration tab.

The Security Policies screen will be displayed.

View Sheets	Import / Export	Reports	Process Managem	ient	System Configuration
Time Entry Options	Company Info E-mail Account Auditing	© Options	Change Password	S U	ecurity Policies
Options		Regional Options	User	Account	S
Accounting/Finance Repre Administrator Employee HR Representative Manager Sample System Admin	sentative	Add Open Delete	]		

2. Click the Add button.

The Security Policies dialog box will appear.

Security Policies					×
Save & New Save & Close	Check All	Policy View	Interface Element	Tasks Entries	Locks Cime Entry Options Regional & Language
Actions	Selection			Area	
Name					
Employee					
Groups					
Use groups					

3. In the Name box, type a name for the policy.

4. Check the Use Group check box if you want to create a security policy for one or more employees that will have group rights to a specified group. This is used when an employee is in more than one group; and any group rights the employee has will only be applied to the groups in which you specify here.

In the Groups panel, you can do the following:

- Click the Add button, to add groups to the security policy definition.
- Select a group from the list and click the Delete button, to remove the group from the security policy definition.

#### Selecting View Criteria Options

5. Click on the View button to specify the View Criteria settings for users assigned to your security profile.

Save & Close	e & New cel	Check All	Policy	View Interface	Elements Tasks	xxxx Entries	Locks Cocks Time Entry Options Regional & Langua
Actions		Selection			Area		
Name							
mployee							
Criteria — Task elements —					Task Status Fields -		
Client	{AII}			Col	mplete		Unchecked 👻
Project	{AII}			Bill	able		Ignore 👻
Event	{AII}			On	Hold		Unchecked 👻
Activity	{AII}			Car	ncelled		Unchecked 👻
Order					Dates		
Level Employee/Template Client Project		Sort Ascending Ascending	Show Mo	ve Up Fro ve Down To Filte	Use dates m er Show current	Ŧ	
Event		Ascending	- I		Show	Ne	
Activity		Ascending	▼	Day	ys count rave start timesheet (		

**Note:** If you do not want users to change View Criteria settings on their timesheets then you'll need to uncheck the "Criteria" checkbox in the Interface area of the security policy. Users assigned to the security policy will not have the option to change the View Criteria when the "Criteria" option is unchecked.

#### Selecting the Interface Options

6. Click on the Interface button to specify which tabs and commands/functions should be shown and which screen should be used as the Start-up view.

Security Policies							2
Save & New Cancel Save & Close	Check All	Policy Vir	ew Interface	Sector Elements	Tasks	xxxx 💭 Entries 👰	Locks Time Entry Options Regional & Language
Actions	Selection			Ar	rea		
- Name							
Employee							
Interface							
intendee							
Theme Blue 👻							
							_
	Yes Start-up View				Yes	Start-up View	=
System Configuration		Re	ports				
Options		F	Print				
Time Entry Options		F	Report Options				
Company Info			Recalculate				
E-mail Account			View Criteria				
Auditing		8	Summary Report	t			
Regional & Language Options			New			$\odot$	
User Accounts			Save The Cur	rrent Template	e 📄		
Change Password			Display Temp	plates			
User Accounts		[	Detail Report			$\odot$	
Security Policies							
Password Options							

### (a) Configuring Access

This screen has different panels that represent the various tabs of the Office Timesheets application. Depending upon the areas that you want to provide access to, check the relevant check boxes in the various panels.

**TIP:** Click the Check All button to check all the check boxes. Similarly, click the Uncheck All button to clear all the check boxes.

**TIP:** Sometimes you may need to check most of the items, but keep only a few unchecked. A quick way to do this is to click the Check All button (to check all the items) and then individually uncheck the items you don't want selected.

**NOTE:** Within each panel, there is a hierarchy of levels that corresponds to the tabs (bold items), ribbon groups (1st level of indented items) and command/functions (2nd level of indented items) of the Office Timesheets application. When you check or uncheck an option in a panel, other related check boxes will also get checked or unchecked automatically.

For example, if you check the Change Password item, the system will automatically check the User Accounts and System Configuration items as well (since you need access to the System Configuration tab and the User Accounts ribbon group, in order to get access to the Change Password command/function).

#### (b) Specifying which Screen should be shown by default at Start-up

Click on one of the radio buttons in the Start-up View column, to specify which screen should initially be shown when the user logs in.

**Note:** In the case of the check boxes, you can select check boxes from as many of the panels as required. However, you can select only one radio button in the Start-up View column, from all of

the panels collectively. The button you select will determine the default opening screen that will be displayed when the user logs in.

Note, however, that you have to provide access to the item you select in the Start-up View column. In other words, you have to also check the item that you want to use for the default opening screen. When you try to save a policy where you have selected an item in the Start-up View column but have not checked the corresponding check box for the item (in the Yes column), Office Timesheets will display the following error message:

Microso	ft Internet Explorer 🛛 🔯
1	You cannot set Start-up View option for unauthorized pages.
	ОК

Providing access to Element-related Functions

7. Click the Elements button to view the Elements panel.

Security Policies											x
Save & N Save & Close	ew		heck A	All Ik All	Policy	View	Interface	Biements	Tasks	xxxx Entries	 Locks Time Entry Options Regional & Language
Actions		Se	lection						Area		
Name											
Employee											
Elements											
2.0000	Yes	None	Self	Group	All						
Add Employees											
Edit Employees											
Delete Employees											
Add Templates											
Edit Templates											
Delete Templates											
View/Modify Employee Rates		۲	$\odot$	$\bigcirc$	$\bigcirc$						
Add Elements											
Edit Elements											
Delete Elements											
Add Expense Codes											
Edit Expense Codes											
Delete Expense Codes											
Add Holidays											
Edit Holidays											
Delete Holidays											

Use this panel to specify the element-related tasks that the user is permitted to perform.

The following table describes the various items in the Elements panel:

Item	Check/Select this item to	Default Value (if any)
Add Employees	Allow the user to add Employee entries.	

Item		Default Value (if any)	
Edit Employees	Allow the us	ser to make changes to Employee entries.	
Delete Employees	Allow the us	ser to delete Employee entries.	
View/Modify Employee Rates	Specify whe You can onl Select None Self Group	ther the user can view or modify Employee Rates. y select one option here. <b>To</b> Disallow the user from viewing or modifying Employee Rates. Allow the user to view or modify only his/her own rates. Allow the user to view or modify the rates of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.) Allow the user to view or modify the rates of any employee of the organization. (This would be an ideal choice for Managers.)	None
Add Elements	Allow the us	ser to add Element entries.	
Edit Elements	Allow the us	ser to make changes to Element entries.	
Delete Elements	Allow the us	ser to delete Element entries.	
Add Expense Codes	Allow the us	ser to add Expense Code entries.	
Edit Expense Codes	Allow the us	ser to make changes to Expense Code entries.	
Delete Expense Codes	Allow the us	ser to delete Expense Codes entries.	
Add Holidays	Allow the us	ser to add Holiday entries.	
Edit Holidays	Allow the us	ser to make changes to Holiday entries.	
Delete Holidays	Allow the us	ser to delete Holiday entries.	
Super Delete for Elements and Employees	Allows the u with linked expense en function)	user to delete element items and employee records data (linked to groups, dependencies, time entries, tries, etc. (use caution when granting access to this	

### Providing access to Task-related Functions

8. Click the Tasks button to view the Tasks panel.

Security Policies										×
Save & New Cancel		Check / Unchec	All xk All	Policy	Y View	Interface	Second Se	Tasks	xxxx Entries	Locks     Lock     Time Entry Options     Regional & Language
- Name -	,									
Employee										
Tasks	a Nana	Calf	0.000	All						
Conorol Accord to Data	s None	Seir	Group	All						<u>^</u>
Add Tacks	0	0	0	0						
Edit Taeke	۲	0	0	0						
View/Modify Task Tracking	•	0	0	0						
Delete Task Tracking		0		0						
Delete Tasks with Entries										E
Delete Tasks without Entries		0	0							
Copy Tasks		0	0	0						
Mass Update Task Data		0	õ	õ						
Re-generate Tasks	0	õ	õ	õ						
Edit Task Dates	۲	õ	ŏ	õ						
Delete Template Tasks	1	0	0	0						
Edit Task Status 1	1									
Edit Task Status 2	1									
Edit Task Status 3	1									
Edit Task Status 4	1									
Edit Task Status 5	1									-
ļ										

Use this panel to specify the task-related operations that the user is permitted to perform.

Item		Default Value (if any)	
	Specify whe data. You ca	ther the user has general access to task-related n only select one option here.	
	None	Disallow the user from viewing or modifying task- related data.	
General Access to Data	Self	Allow the user to view or modify only his/her own task-related data.	None
	Group	Allow the user to view or modify the task-related data of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)	
	All	Allow the user to view or modify the task-related data of any employee of the organization. (This would be an ideal choice for Managers.)	
	Specify whe option here.	ther the user can add tasks. You can only select one	
	Select	То	
Add Tasks	None	Disallow the user from adding tasks.	None

The following table describes the various items in the Tasks panel:

Self

Group

Allow the user to add only his/her own tasks. Allow the user to add tasks for anyone in his/her group (or in the groups that have been added to

the security policy). (This would be an ideal choice

Item	Check/Select this item to	Default Value (if any)
	for Group managers or Team leaders.) Allow the user to add tasks for any employee of All the organization. (This would be an ideal choice for Managers.)	
Edit Tasks	Specify whether the user can make changes to tasks. You can only select one option here.SelectToNoneDisallow the user from editing tasks.SelfAllow the user to edit only his/her own tasks. Allow the user to edit tasks for anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to edit tasks for any employee of the organization. (This would be an ideal choice for Managers.)	None
View/Modify Task Tracking	Specify whether the user can view or make changes to task rates and hours. You can only select one option here.SelectToNoneDisallow the user from viewing or modifying task tracking data.SelfAllow the user to view or modify only his/her own task tracking data.GroupAllow the user to view or edit task tracking data for anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to view or edit task tracking data for any employee of the organization. (This would be an ideal choice for Managers.)	None
Delete Task Tracking	Specify whether the user can delete task rates and hours. You can only select one option here.SelectToNoneDisallow the user from deleting task tracking data.SelfAllow the user to delete only his/her own task tracking dataGroupAllow the user to delete task tracking data for anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to delete task tracking data for any employee of the organization. (This would be an ideal choice for Managers.)	None
Delete Tasks with Entries	Specify whether the user can delete tasks that contain entries or	None

Item	Check/Select this item to	Default Value (if any)
	notes. You can only select one option here.         Select       To         None       Disallow the user from deleting tasks with entries or notes.         Self       Allow the user to delete only his/her own tasks with entries or notes.         Allow the user to delete tasks with entries or notes of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or	
	Team leaders.)Allow the user to delete tasks with entries orAllnotes of any employee of the organization. (Thiswould be an ideal choice for Managers.)	
Delete Tasks without Entries	Specify whether the user can delete tasks that do not contain entries or notes. You can only select one option here.SelectToNoneDisallow the user from deleting empty tasks.SelfAllow the user to delete only his/her own empty tasks.GroupAllow the user to delete empty tasks of anyone in his/her group (or in the groups that have been 	None
Copy Tasks	Specify whether the user can copy tasks from one user's timesheet to one or more other user's timesheets. You can only select one option here.SelectToNoneDisallow the user from copying tasks.SelfAllow the user to copy only his/her own tasks to other users.Allow the user to copy tasks between anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to copy tasks between any employee of the organization. (This would be an ideal choice for Managers.)	None
Mass Update Task Data	Specify whether the user can perform mass updation of task entries. You can only select one option here.         Select       To         None       Disallow the user from mass updating tasks.	None

Item	Check/Select this item to	Default Value (if any)
	SelfAllow the user to mass update only his/her own task entries.GroupAllow the user to mass update task entries of anyone in his/her group (or in the groups that have been added to the security policy). (This 	
Re-generate Tasks	Specify whether the user can generate tasks from non-task based entries. You can only select one option here.SelectToNoneDisallow the user from re-generating tasks.SelfAllow the user to re-generate only his/her own tasks.GroupAllow the user to re-generate tasks for anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to re-generate tasks for any employee of the organization. (This would be an ideal choice for Managers.)	None
Edit Task Dates	Specify whether the user can make changes to the task start and end dates. You can only select one option here.SelectToNoneDisallow the user from editing task dates.SelfAllow the user to edit only his/her own task dates.Allow the user to edit task dates for anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to edit task dates for any employee of the organization. (This would be an ideal choice for Managers.)	None
Edit Task Status 1 to Edit Task Status 15	These are 15 user-defined task status fields. Specify whether the user can edit these task status items.	

Providing access to Entry-related functions

9. Click the Entries button to view the Entries panel.

Security Policies											2
Save & New Cancel		Check Uncher	All ck All	Polic	y	Y View	Interface	Sements Elements	Tasks	xxxx Entries	Locks Cocks Time Entry Options Regional & Language
Actions		Selection	n						Area		
Name											
Employee											
Entrico											
Ellules	Yes	None	Self	Group	All						
Delete Time Entries Delete Expense Entries Mass Update Time Entries Mass Update Expense Entries Require Start/Stop Times Require Existing Task Edit Existing Entries Edit Entries Outside Prev/Cur/Next Edit Entries in Previous Period Edit Entries in Current Period Edit Entries in Next Period Edit Entries in Next Period Edit Entries Outside Task Dates Edit Entries Scope Edit Entries Scope		© © •			0000						E

Use this panel to specify the entry-related operations that the user is permitted to perform.

Item		Default Value (if any)	
	Specify wl can only s Select	hether the user can delete time entries. You elect one option here. <b>To</b>	
Delete Time Entries Delete Expense Entries	None	Disallow the user from deleting time entries.	
	Self	Allow the user to delete only his/her own time entries.	None
	Group	Allow the user to delete time entries of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)	none
	All	Allow the user to delete time entries of any employee of the organization. (This would be an ideal choice for Managers.)	
	Specify wi You can o	hether the user can delete expense entries. nly select one option here.	None
	Select	То	

The following table describes the various items in the **Entries** panel:

Item	Check/Select this item	to	Default Value if any)
	NoneDisallow the user from de entries.SelfAllow the user to delete or expense entries.GroupAllow the user to delete expense entries.Groupgroups that have been add security policy). (This work choice for Group manager leaders.)AllAllow the user to delete expense addressed security policy). (This work 	leting expense nly his/her own xpense entries p (or in the led to the uld be an ideal rs or Team xpense entries ganization. toice for	
Mass Update Time Entries	Specify whether the user can perform of time entries. You can only select orSelectToNoneDisallow the user from matime entries.SelfAllow the user to mass up his/her own time entries.GroupAllow the user to mass up entries of anyone in his/h the groups that have been security policy). (This work choice for Group manager leaders.)AllAllow the user to mass up entries of any employee o organization. (This would choice for Managers.)	a mass updation ae option here. Ass updating date only date time er group (or in added to the uld be an ideal rs or Team date time f the be an ideal	None
Mass Update Expense Entries	Specify whether the user can perform of expense entries. You can only select here.SelectToNoneDisallow the user from ma expense entries.SelfAllow the user to mass up his/her own expense entriGroupentries of anyone in his/h the groups that have been	a mass updation at one option ass updating date only ies. date expense er group (or in added to the	None

Item	Check/Select this item to	Default Value (if any)
	Allsecurity policy). (This would be an ideal choice for Group managers or Team leaders.)Allow the user to mass update expense entries of any employee of the organization. (This would be an ideal choice for Managers.)	
Require Start/Stop Times	Force the user to enter start/stop times for task entries.	
<b>Require Time Entry Notes</b>	Force the user to enter notes with each time entry.	
Require Existing Task	Allow the user to make an entry only if a task exists for that entry.	
Edit Existing Entries	Allow the user to make changes to existing entries. Note: Edit Existing Entries must be checked in order to allow the user to edit entries. The other options (Edit Entries Outside Prev/Cur/Next, Edit Entries in Previous Period, Edit Entries in Current Period, and Edit Entries in Next Period) simply define more specifically what entries the user can edit. Users will be able to make changes to entries only if Edit Existing Entries is checked.	
Edit Entries Outside Prev/Cur/Next	Allow the user to make changes to entries that do not fall within the Previous, Current and Next reporting period that is assigned to the user. Note: This option allows the user to make changes to existing entries; the user will not be able to create new entries.	
Edit Entries in Previous Period	Allow the user to make changes to entries that fall in the reporting period that is previous to the current reporting period.           Note: This option allows the user to make changes to existing entries; the user will not be able to create new entries.	
Edit Entries in Current Period	Allow the user to make changes to entries that fall in	

Item	Check/Select this item to	Default Value (if any)
	the current reporting period.          Note: This option allows the user to only make changes to existing entries; the user will not be able to create new entries.	
Edit Entries in Next Period	Allow the user to make changes to entries that fall in the reporting period that comes after the current reporting period. <b>Note:</b> This option allows the user to only make changes to existing entries; the user will not be able to create new entries.	
Edit Entries Outside Task Dates	Allow the user to make changes to entries that fall outside of a task's start and end dates specified in the <b>Task</b> dialog box.	
Edit Entries Scope	Specify whether the user can make changes to the scope of the entries. You can only select one option here.SelectToNoneDisallow the user from editing the scope of the entries.SelfAllow the user to edit the scope of only his/her own entries.GroupAllow the user to edit the scope of the entries of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.)AllAllow the user to edit the scope of the entries of any employee of the organization. (This would be an ideal choice for Managers.)	None
Edit Entry Status 1 to Edit Entry Status 15	These are 15 user-defined entry status fields. Specify whether the user can edit these entry status items.	
Edit Approval Status	Allow the user to make changes to the approval status.	

Providing access to Lock-related functions

10. Click the Locks button to view the Locks panel.

Security Policies						x
Save & New Cancel	Check All Uncheck All	Policy Interface	Biements Tasks	Entries	Time Entry Options	Regional & Language
Name						
Locks Yes None 1 Lock Employees ③ Overnde Lochs ]	Self Group All					

Use this panel to specify the Lock-related operations that the user is permitted to perform.

Default Value (if any)

Item	Check/Select this item to
	Specify whether the user can lock the entries made by employees. You can only select one option here.
	Select To
	None Disallow the user from locking the entries

The following table describes the various items in the **Locks** panel:

Lock Employees	Select None Self Group	To Disallow the user from locking the entries made by employees. Allow the user to lock only his/her own entries. Allow the user to lock the entries of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.) Allow the user to lock the entries of any employee of the organization. (This would be an ideal choice for Managers.)	None
Override Locks	Allow the	user to edit entries which have been locked.	

### Enforcing Time Entry Options

11. Click the Time Entry Options button to view the Time Entry Options panel.

Save & Herr     Cancel     Pricy     Image: Terminal Status     Pricy     Image: Terminal Status     Pricy     Pricy     Image: Terminal Status     Pricy	Save & Save & Save       Save & Save & Save       Save & Sav	Security Policies							×
Actions     Selection     Area       Name	Actors     Selection     Area       Name	Save & New X Cancel	Check All Unchec	All Policy	Interface	Elements Tasks	Entries Locks	Time Entry Options	Regional & Language
Trame Trame Time Entry Options Policy Enforced?  efault start time for time entry efault start time for time entry ay View tris intervals in minutes ay View tris intervals ay Use visat time me spect only on Timesheet View me spect format me spect format me spect only on Timesheet View	Name         Time Entry Options         Policy Enforced?         Default start time for time entry         Day Wew time intervals in minutes         Day Wew time time entry         Day Wew time intervals in minutes         Day Wew time intervals in time intervals in time intervals in time intervals in the intervals in time intervals in tintervals in time intervals in time interval	Actions	Selection				Area		
Time Entry Options  efault start time for time entry  efault start time for time entry  efault start time for time entry  y lew kinst time  ay View Kinst time  ay View Kinst time  me spent only on Timesheet View  me spent format  me spent format  me spent only on Timesheet View	Time Entry Options  Policy Enforced?  Default start time for time entry  Day View time intervals in minutes  Day View first time Day View inst time Time spent for und interval interva	Name							
Policy Enforced?  Folicy Enfo	Policy Enforced?  Default start time for time entry Policy Enforced?  Default start time for time entry Day View time intervals in minutes Day View first time Day View first time Day View first time Time spent form of Diresheet View Time spent format Show totals by employee Reporting Period	Time False Onlines							
efault start time for time entry ay View time intervals in minutes ay View trast time ay View trast time ay View tast time me spent only on Timesheet View me spent format by totals to remotive Reporting Period	Default start time for time entry Day live time time values Day live time time Day live list time Day live list time Day live list time Time spent ofty on Timesheet View Time spent ofty on Timesheet View Show totals by employee Reporting Period	Time Entry Options	Policy Enfo	rced?					
ay View time intervals in minutes ay View tistime ay View institute me spent only on Timesheet View me spent format me work table to remotive Reporting Period	Day View time intervals in minutes  Day View timt first time Day View tast time Time spent only on Timesheet View Time spent format Show totals by employee Reporting Period	Default start time for time entry							
ay View first time  ay View first time ay View first time me spent only on Timesheet View me spent format me spent format	Day View Inst time  Day View Inst time  Day View Inst time  Time spent formal  Show totals by employee Reporting Period	Day View time intervals in minutes	ň						
ay View last time are spent format brown table to remotive Recording Period	Day View last time  I'me spent only on Timesheet View Show totals by employee Reporting Period	Day View first time							
ime spent only on Timesheet View	Time spent only on Timesheet View	Day View last time							
ime spent format	Time spent formal	Fime spent only on Timesheet View	N						
how totals by employee Reporting Period	Show totals by employee Reporting Period	Fime spent format							
		Show totals by employee Reporting	Period						

Use this panel to enforce the **Time Entry Options** for all users who have not set their own Time Entry Options (using the **Time Entry** button in the **System Configuration** tab).

The following table de	escribes the various	items in the Time	Entry Options panel:
------------------------	----------------------	-------------------	----------------------

Item	Check/Select this item to	Default Value (if any)
Default start time for time entry	Force the <b>Time Entry</b> dialog box to display the default start time specified in the <b>Time Entry Options</b> screen.	
Day View time intervals in minutes	Force the <b>Day View</b> screen to display the time using the interval specified in the <b>Time Entry Options</b> screen.	
Day View first time	Force the <b>Day View</b> screen to begin display of time intervals with the first time slot as specified in the <b>Time Entry Options</b> screen.	
Day View last time	Force the <b>Day View</b> screen to end display of time intervals with the last time slot as specified in the <b>Time Entry Options</b> screen.	
Time spent only on Timesheet View	Display the <b>Time Spent Only</b> field in the <b>Time Entry</b> dialog box when an employee opens it from the <b>Timesheet View</b> screen.	
Time spent format	Force the <b>Day View</b> screen to use the time spent format specified in the <b>Time Entry Options</b> screen.	
Show totals by employee Reporting Period	Force the <b>Task Totals</b> and <b>Sheet Total</b> on the <b>Timesheet</b> <b>View</b> to display the total for the user's <b>Reporting Period</b> , irrespective of the period that the user is currently viewing in his/her <b>Timesheet</b> .	

**Note:** Time entry options can either be set by individual users (if they are given access to the Time Entry Option area of the System Configuration tab), or can be enforced via the Security Policy assigned to the user.

When these options are enforced via the Security Policy assigned to a user, he/she will no longer be able to change the settings (even if the user has access to the System Configuration tab). As long as the settings are enforced via the Security Policy, the options that have been enforced will appear disabled or grayed out in System Configuration tab.

When the settings are enforced by a Security Policy assigned to some users, it only affects those users who have not changed the default settings. If a user has changed the default settings, the user's settings are not affected by the enforcement. However, as long as the settings are enforced, the user will not be able to change the settings.

Enforcing Regional and Language Options

12. Click the Regional & Language button to view the Regional & Language panel.



Use this panel to enforce the Regional Options for all users who have not set their own Regional Options (using the Options button in the System Configuration tab).

The following table describes the various items in the Regional & Language panel:

Item	Check/Select this item to	Default Value (if any)
Date Display	Force the display of dates with the date display format specified in the <b>Regional Options</b> screen.	
Time Display	Force the display of time values with the time display format specified in the <b>Regional Options</b> screen.	
Currency/Time Interval Display	Force the display of currency or time values with the currency/time interval display format specified in the <b>Regional Options</b> screen.	
Language	Force the use of the language specified in the <b>Regional Options</b> screen.	

Note: Regional and Language options can either be set by individual users (if they are given access to the

Regional & Language area of the System Configuration tab), or can be enforced via the Security Policy assigned to the user.

When these options are enforced via the Security Policy assigned to a user, he/she will no longer be able to change the settings (even if the user has access to the System Configuration tab). As long as the settings are enforced via the Security Policy, the options that have been enforced will appear disabled or grayed out in System Configuration tab.

**Note:** When the settings are enforced by a Security Policy assigned to some users, it only affects those users who have not changed the default settings. If a user has changed the default settings, the user's settings are not affected by the enforcement. However, as long as the settings are enforced, the user will not be able to change the settings.

#### Saving the Security Policy

12. Once you have made all the selections (as described in the previous topics), do one of the following:

Do this	То
Click the Save & New button	Save this Security Policy and start creating a new Security Policy.
Click the <b>Save &amp; Close</b> button	Save this Security Policy and return to the <b>Security Policies</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the Security Policy dialog box	Return to the <b>Security Policies</b> screen without saving the new Security Policy.

## Using Security Policies to allow members from different groups to share data

Office Timesheets allows group-wise management of employee data. At the time of creating an employee entry, you can assign the employee to one or more groups. An employee can share data only with other employees who are members of the same group/groups as himself.



When employees from two different groups need to work together on a project, you can create a temporary grouping of the members by designing a security policy where you select both the groups and provide access to the Group using the Tasks panel. You would then assign this security policy to the User Accounts of the employees who need to work together. Once the project is finished, you can reassign their original security policies.



## Making Changes to a Security Policy

To make changes to a security policy:

1. Click on Security Policies in the System Configuration tab.

The Security Policies screen will appear.

	· · · · · · · · · · · · · · · · · · ·	
Options	Change Password	User Accounts Security Policies Password Options
Regional Options	User Acc	counts
Add Open Delete	]	
	Options Regional Options Add Open Delete	Options Regional Options Add Open Delete

- 1. Select a security policy from the list box and click the **Open** button.
- 2. Make changes to the security policy. (See *Creating a Security Policy* for more information.)

Do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes that you have made to the Security Policy and start creating a new Security Policy.
Click the Save & Close button	Save the changes that you have made to the Security Policy and return to the <b>Security Policies</b> Screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the User Account dialog box	Return to the <b>Security Policies</b> screen without saving the changes that you have made to the Security Policy.

### **Deleting a Security Policy**

To Delete a Security Policy:

1. Click on Security Policies in the System Configuration tab.

The Security Policies screen will appear.

View Sheets Import / E	xport Reports	Process Manageme	ent System Configuration
Time Entry Options	fo unt Options	Change Password	User Accounts Security Policies Password Options
Options	Regional Options	User A	Accounts
Administrator Employee HR Representative Manager Sample System Admin	Open Delete		

- 2. Select a security policy from the list box and click the Delete button.
- 3. Click **OK** to delete the security policy or click **Cancel** if you do not wish to delete the security policy.

**Note:** If you attempt to delete a security policy that is currently assigned to a user account you will get the following message:

Microsoft Internet Explorer		
♪	You cannot delete this record(s) because it is in use.	
	OK	

In order to delete a security profile within Office Timesheets, it must not be assigned to any user account.

## **Configuring Password Options**

As a systems administrator, you can specify the minimum and maximum lengths permissible for passwords. You can also specify whether a valid password should contain only characters (or letters) or a combination of characters and numbers.

### **Password Options for Office Timesheets Hosted Version**

To configure the Password Options for the Office Timesheets Hosted Version:

- 1. Click on Password Options in the System Configuration tab.
- 2. Specify the required password options and click the Save button.



The following table provides more details about the components of the Password Options screen:

Item	How to use the Item	Default Value (if any)
Require combination of numbers and characters	Check this check box to specify that a valid password should contain both letters and numbers. If this check box has been selected, <b>Office Timesheets</b> will not allow the users to set passwords containing only characters or only numbers. The password has to contain a combination of both numbers and characters.	Unchecked
Minimum character length of passwords	From the drop-down list, select the minimum length for the passwords.	0 (zero)
Maximum length of passwords	From the drop-down list, select the maximum length for the passwords.	14
The Clear button	Click the <b>Clear</b> button to delete all the values from the fields on the page.	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	

Item	How to use the Item	Default Value (if any)
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	9

**NOTE:** You can set the Minimum length and Maximum length fields to the same value to force all passwords to be the same length. Office Timesheets enforces the Minimum length and Maximum length settings for new passwords. In the case of existing passwords, Office Timesheets enforces the Minimum and Maximum length only when you change the passwords.

## **Password Options for Office Timesheets Self-Installed Version**

In the Self-Installed Version of Office Timesheets, you can specify whether to use Office Timesheets user login and authentication, or Windows user login and authentication.

If you decide to use Windows authentication:

- You will need to configure IIS manually if you want Windows Authentication to work properly.
- You can use your Windows login username and password to log into Office Timesheets. There is no need to have separate Office Timesheets usernames and passwords.
- If an employee does not have a Windows password, the employee must enter his/her Office Timesheets password to log in. Otherwise, all employees will have to use their Windows username and passwords to log in.
- Office Timesheets will not allow employees to access the Change Password screen. Employees must maintain their passwords using Windows.

To Configure the Password Options:

- 1. Click on Password Options in the System Configuration tab.
- 2. Specify the required password options and click the Save button.

#### Configuring Office Timesheets to work with Windows Authentication

To use Windows Authentication to verify the login of Office Timesheets follow the instruction below (\*\*\*PLEASE NOTE\*\*\* - Access to the Process Management Tab and the System Configuration tab is required. Contact the Office Timesheets Administrator for assistance with this if required):

1. Log into Office Timesheets with an Administrator login credentials.



- 2. Next, go to the "System Configuration" tab and choose the "Password Options" button.
- 3. Select "Windows Authentication" from the drop down menu and then enter your network's domain name in the "Windows domain name" field. Then select "Save" and log out of Office Timesheets.

View Sheets Import / Export	Reports	Process Managem	ent System Configu	ration
Image: Company Info         Image: Company In	© Options	Change Password	User Accounts County Policies County Policies County Policies	Activate About/Update
Options	Regional Options	User	Accounts	System
Password Options				
Use for usernames and passwords -				
Windows Authentication				
Windows domain name				
*Note: You should configure IIS manually want Windows Authentication to work pro	if you perly.			
If using Office Timesheets for Account	ts and Password	s		

#### \*\*\*\*\*Server 2003, XP, Vista\*\*\*\*\*\*

4. Configure IIS manually: From the web server right click on "My Computer" and select "Manage", which will bring up the "Computer Management" console.

- 5. Expand "Services and Applications", "Internet Information Services", "Web Sites", and finally expand "Default Web Sites".
- 6. Right click on "OTS" (default) or the Virtual name that was created during Office Timesheets installation and select "Properties". Locate and click on the "Directory Security" tab, choose "Edit" from the "Authentication and access control" field. Within the "Authentication and access control" dialog box check "Integrated Windows authentication", and click **OK** to save changes. Please NOTE: the "Enable anonymous access" option is NOT required, it can be either way (checked or unchecked).



\*\*\*\*\* Server 2008\*\*\*\*

Right click on the "Computer" icon and select "Manage", which will bring up the "Server Manager" console.

Expand "Roles", "Web Server (IIS)", "Internet Information Service (IIS) Manager", and expand the server name. Expand "Sites" and "Default Web Sites".

Highlight "OTS" (default) or the Virtual name that was created during Office Timesheets installation. While in "Features View", double-click "Authentication".



- 1. Log back into Office Timesheets with the Administrator login.
- 2. Next click on the "System Configuration" tab and choose the "User Accounts" button. Select the "Add" button and choose your Employee by clicking on the [...] button next to the "Employee" field. Enter in the Employee's Windows Profile Password credentials and hit the **Save & Close** button.

Process Manage	admin ment System Configuration	
Change Password	Veer Accounts     Security Policies     Activate     About/Updates     Sustem	
Add Open Delete	User Account x	
	Employee Security Policy Administrator Change Password Password Confirm Password	

3. Go to the "Process Management" tab, then highlight and open the desired Employee.

View Sheets	Import / Export Reports	Process Management Syste	m Configuration
Element items	Holidays	Define Elements	s Customize Entry Status Fields ids Status Fields Reference Approval Status Fields isk Status Fields Rate Tables
Edit	Process		Customize
Manage Employee			
Employee Groups	3	Employee	
{AI}}		Add admin Open Delete	Add Open Delete

4. Enter the employee's windows login in the "Windows Login" field.

Save & Close	Definition Rates Groups Dependencies Custom Fields
Actions	Show
First Name	admin
M.I.	admin
Last Name	admin
Display Name	admin
E-Mail	admin@company.com
Windows Login	>
Status	Active
Reporting Period	Weekty
Holidays Groups	{No selection}

5. Re-enter the Office Timesheets URL (link) in the address bar. Office Timesheets is now configured to use Window Authentication, so the user will see the "Start up" page that is configured in "Security Policies".

### Why is windows authentication not working?

If you are having trouble with windows authentication, please verify the following setting:

In the **web.config** file [c:\program files\Office Timesheets\original\] verify the authentication mode='Windows'

Example:

<authentication mode="Windows">

<forms loginUrl="~/Pages/login.aspx" defaultUrl="~/Pages/login.aspx" />

</authentication>

If it is currently set to 'Forms' please change to 'Windows.'; save the file; and retry.

# **Setting Up and Managing Processes**

Before you can use Office Timesheets to record time and expense entries, you have to customize Office Timesheets to adapt to your organization's processes. You also have the option to define or set up other details such as:

- list of holidays;
- the task rules;
- the approval process; and
- the reporting period used by your organization.

Use the Process Management tab to define the setup of the processes and the definition employees and work items (project names, tasks/activities, etc.).

Using the functions of the Process Management tab, you can:

- Define the basic elements that make up the processes in your organization;
- Define custom fields for each of the basic elements;
- Define additional fields to keep track of task rates;
- Set up task status, entry status and approval status values;
- Define rate table fields to maintain details of employee pay rates;
- Set up a list of holiday groups and holidays;
- Define task rules;
- Define the steps in the approval process;
- Define and set up reporting periods;
- Set up employee groups and enter details of all the employees in your organization;
- Set up groups and enter details for all the basic elements that make up your organization's processes;
- Set up groups and enter details for Timesheet Templates; and
- Set up expense groups and enter details of the various heads of expense used in your organization.

### **The Process Management tab**

The Process Management tab contains all the functions needed to manage and customize Office Timesheets' data and process framework for tracking time and expenses.

Employee	💆 Task Rules	Custom Fields
Element Items	Approval Process	🍓 🙇 Task Rate Fields 📑 🔁 Rate Tables
😂 Expense	Holidays Reporting Periods	Define Elements 📫 Customize Task Status Fields
M Timesheet Templates		Customize Entry Status Fields
Edit	Process	Customize

The Process Management tab has three ribbon groups—Customize, Process and Edit—that contain the commands needed to define and set up the processes in your organization.

The following table describes what each of the commands in the Process Management tab does:

Click on	То
Define Elements	Define the hierarchy of the basic elements that make up the processes in your organization.
Custom Fields	Define custom fields for each of the basic elements.
Task Rate Fields	Define additional fields to keep track of task rates.
Customize Task Status Fields	Set up task status values to be displayed in the <b>Status Fields</b> panel of the <b>Task</b> dialog box.
Customize Entry Status Fields	Set up entry status values to be displayed in the <b>Status Fields</b> panel of the <b>Time Entry</b> dialog box.
Customize Approval Status Fields	Set up approval status values to be displayed in the <b>Approval Status</b> drop-down list of the <b>Time Entry</b> dialog box.
Rate Tables	Define rate table fields to maintain details of standard and overtime rates payable to employees.
Holidays	Set up a list of holiday groups and holidays.
Task Rules	Define the order in which the basic elements should appear in a task entry. Also specify the dependencies of the basic elements on one another and whether the elements are essential for the task entry.
Approval Process	Define the steps and the order of the steps in the approval process.
Reporting Periods	Define and set up the list of reporting periods that can be used in <b>Timesheet View</b> .
Employee	Set up employee groups and create employee entries for all the employees in your organization; enter the details of the employees and assign them to one or more groups.
Element Items	Set up groups and enter details for all the basic elements that were defined with the <b>Define Elements</b> function.
Expense	Set up expense groups and enter details of the various heads of expense used in your organization.

Understanding Office Timesheets Data and Process Framework

Office Timesheets is a highly flexible and customizable application. At the heart of Office Timesheets are Tasks and Entries—everything else simply supports these important time tracking data records. Essentially, every time entry within Office Timesheets is based upon tasks. Tasks basically give the time entries meaning, such as who performed the work and what type of work was done. You can define various Element Levels to help you keep track of the time and money spent on a project or task. Within Office Timesheets you can create

up to ten (10) Element Levels to define tasks. A task is comprised of a combination of an Employee and one or more Element Items, that are defined at each Element Level.

By default, Office Timesheets is setup with four Element Levels:

- 1. Client
- 2. Project
- 3. Phase
- 4. Activity

Though Office Timesheets names these four Element Levels as Client, Project, Phase and Activity, you can give any name you want to these elements. You can define upto ten Element Levels. The elements you define and the names you give to these elements would depend upon:

- the level of detail you want in your reports; and
- the method of task-related time and expense data tracking that your organization follows.

For example, each task could be comprised as follows: employee + client + project + phase + activity + expense.



This would be your basic foundation for recording time and expense entries on the employee timesheets. With such a setup you can easily create reports that will allow you to arrange data (sort, total, sub-total etc. time, costs, expenses and so on) by employee, client, project, phase, and/or activity. Therefore, your definition of Element Levels will become your basic framework or foundation for your organization's time and expense tracking.

## **Defining the Elements to Track Time and Expense Entries**

Before you start recording your time and expense entries, you first need to define the structure of the task elements in your organization. Element Levels are the primary foundation in which tasks are defined and time is tracked.

To define your task element structure:

1. Click on Define Elements in the Process Management tab.
#### The Define Elements screen will appear.

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This screen allows you to define the hierarchical order of elements that form your task structure. In Office Timesheets, the task structure begins with an Employee element and ends with an Expense element. Office Timesheets allows you to define upto 10 levels of elements between these two elements.

**Note:** Though the Employee and Expense items are fixed, you can change the names of these items. For example, you could change the label or name "Employees" to display as "Resources" or "Team Members".

- 1. Check the check box next to an element you want to activate.
- 2. Type a name for the element in the Name text box.
- 3. Repeat the above two steps to define more elements.
- 4. Finally, click the Save button to create the elements.

The following table provides more details about the components of the Define Elements screen:

Item	How to use the Item	Default Value (if any)
Activate Element check box	Check this check box to activate an element. Uncheck the check box to deactivate an element.          NOTE: The Employee and Expense elements are pre-defined and always active. You cannot deactivate them.         TIP: If you deactivate an element (by unchecking it) the details or entries of that element still remain within Office Timesheets for reporting purposes. They are just hidden from view. If you later reactivate the element (by checking it), Office Timesheets will once again display the details or entries of that element.	
Name	Type a name for the element. The element names that you define and activate here will appear in the <b>Task</b> dialog box. They also appear in the drop-down menus that are displayed when you click on the <b>Element Items</b> and <b>Custom Fields</b> buttons. <b>NOTE:</b> The <b>Name</b> field can also be used to rename the pre-defined <b>Employee</b> and <b>Expense</b> elements, to some name that is more suitable to your organization's task structure. For example, you could change the label or name "Employees" to display as "Resources" or "Team Members".	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore	

Item	How to use the Item       Default Valid (if any)         the values entered in the fields back to what they were when you <i>last</i> saved the page.       Image: Comparison of the page of				
	the values entered in the fields back to what they were when you <i>last</i> saved the page.				
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page without clicking the <b>Save</b> button.				

## **Defining Custom Fields for the Task Elements**

Once you have defined all the elements, you need to define custom fields to store the data for these elements. Office Timesheets allows you to define upto ten (10) custom fields for each element (including the Employee and Expense elements). Each element has its own unique screen where you can define the fields for the selected element. To define custom fields:

1. Click on Custom Fields in the Process Management tab.

A drop-down menu appears that contains all the elements that you have defined.

Custom Fields	
Employee	
Client	
Project	
Phase	
Sub-task	
Cost Center	
Expense	

2. Click on an item in the drop-down menu to add custom fields to that item. For example, click on Employee to add custom fields to the Employee element.

The Custom Field Definitions screen for the selected element appears.

Expense Eol	Report Protections for Employee	Jes al Process ng Periods	Cetive Elements	itom Fields ik Rate Fields itomize Task Status Fields Customize	Custonize Entry Status Pielos
Use field	Name		Туре		
Field 1	Employee Type	List	Clear		
Field 2	Work Extension	Text	Clear		
Field 3	Start Date	Date	Clear		
Field 4	Employment Status	LM	Clear		
Field 5	Home Phone	Text	M Clear		
Field 6	Mobile Phone	Text	Clear		
Field 7	Emergency Contact	Text	Clear		
Field 8	Emergency Contact Phone 1	Text	Clear		
Field 9	Emergency Contact Phone 2	Text	Clear		
Field 10	Birthday	Date	M Clear		

The following table provides more details about the components of the Custom Field Definitions screen:

Item	How to use the Item	Default Value (if any)
Use field	Check this check box in front of a custom field to use that field. Uncheck the check box to stop using the custom field. <b>TIP:</b> If you deactivate a field (by unchecking it) the details or entries of that field still remain within Office Timesheets for reporting purposes. They are just hidden from view. If you later re-activate the field (by checking it), Office Timesheets will once again display the details or entries of that field.	
Name	Type a name for the field. This name will appear in the <b>Custom Fields</b> panel of the related element entry dialog box. For example, if you are defining the custom fields for <b>Employees</b> , the field names you specify will be displayed in the <b>Custom Fields</b> panel of the <b>Employee</b> dialog box.	
Туре	Select the type of the field from the <b>Type</b> drop-down list. The type of the field determines the type of data that can be stored in the field. The <b>Type</b> drop-down list contains the following values— <ul> <li>Text</li> <li>Date</li> <li>Integer</li> <li>Number</li> <li>Currency</li> <li>List</li> <li>E-mail Address</li> </ul> <li>For more information about field types, see <i>Custom</i> Field Types.</li>	Text

Item	How to use the Item			
The Clear button				
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.			

#### **Custom Field Types**

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While defining custom fields for the various elements, you have to select the type of the field from the Type drop-down list. The type of the field determines the type of data that can be stored in the field. The Type drop-down list contains the following values:

Value	What happens if you select this value
Text	The user will be able to enter text and numbers into the field. However, it will all be treated as text.
Date	The user will be able to enter only dates in the field. A date picker will appear when the user clicks in a field of type <b>Date</b> .
Integer	The user will be able to enter only integers (or whole numbers) in the field. The number can be positive, negative or zero. Numbers with decimal points, such as 3.45 or –5.6223 will not be allowed.
Number	The user will be able to enter any number in the field. The number can be an integer or a number with a decimal fraction.
Currency	The user will be able to type only numbers in the field. The vlaue that the user types will be stored as a currency with two decimal digits.
List	The user will be presented with a drop-down list. The user will only be able to choose



## **Defining Task Rate Field Labels**

While entering Task details in the Task dialog box, Office Timesheets provides you with an area to enter the Task Rates and Hours. With the exception of the Task Rate field, you can give your own user defined labels to the other task rate fields.

ave & Close	Save as new Cancel				
Actions	Show				
Task Elements			Task Start and Du	ie dates	
nployee	Anderson A Brian		Start Date		
ient	Addison Labs		Due Date	10	
oject	AccountStar				
nase	Bus Analysis	Bus Analysis Task rates and ho	urs		
isk	(No selection)		Task rate	0.00	Get rate
ost Center	(No selection)		Budget	0.00	0.00
	the second		Cost	0.00	0.00
			Est. to Complete	0.00	0.00
			Statuses		
			Complete	🗌 Bi	llable
			On Hold		
			Cancelled		

To define the Task Rate field labels:

1. Click on Task Rate Fields in the Process Management tab.

The Task Rate Fields screen will appear.

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee	Task Rules Approval Process Holidays Reporting Periods	Define Elements	Custom Fields Fask Rate Fields Customize Task Status Fields	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Edit	Process	9	Customize	
1 Budget				_
2. Cost				
3. Est. to Complete				
	Res	et Save		

default, Office Timesheets labels these fields as Budget, Cost and Est. to Complete. However, you can rename these fields, if you wish.

By

2. Type the names for these fields in the text boxes provided and click the Save button.

The following table provides more details about the components of the Custom Field Definitions screen:

Item	How to use the Item	Default Value (if any)
1.	Type a name for the first user defined Task Rate field.	Budget
2.	Type a name for the second user defined Task Rate field.	Cost
3.	Type a name for the third user defined Task Rate field.	Est. to Complete
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. NOTE: If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. TIP: If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

## **Customizing Task Status Values**

When making a task entry, you can indicate the status of the task, by checking one or more values in the Status Fields panel of the Task dialog box. (You can also update the Task Status by using the Task Status Fields in the Mass Update screen.)

Task Save as new Cancel Save & Close	×
Actions     Show       Task Elements	Task Start and Due dates         Start Date         Due Date         Task rates and hours         Task rate       0.00         Budget       0.00         Cost       0.00         Est to Complete       0.00
	Status Fields Complete On Hold Cancelled

The values in the Task Status Fields panel are user-defined. As a systems administrator, Office Timesheets allows you to specify up to 15 Task Status values. To customize or set up Task Status values:

1. Click on Customize Task Status Fields in the Process Management tab.

The Customize Task Status Fields screen will appear.

0	View Sheets	Import / Export	Reports	Process Manag	ement	System Configuration	n Account Administration
	Employee Element Rems Expense Edt	Holidays	isk Rules oproval Process oporting Periods IS	Define Elements	Custon	n Fields ate Fields nize Task Status Fields Customize	Customize Entry Status Fields
Cus	stomize Task Sta	itus Fields	Status name			Lock task an entries	d
1.	Complete						
2	Billable						
3.	On Hold						
4.	Cancelled						
5.							
6.							
7.							
8.							
9.							
10.							
12							
13	-						
14.							
15.							
						Reset Sav	e

- 2. Add up to 15 status values in the text boxes.
- 3. Choose whether to lock tasks and entries for any of the status values.
- 4. Click the Save button to save the changes that you have made.

The following table provides more details about the components of the Customize Task Status Fields screen:

Item	How to use the Item	Default Value (if any)
Status name	Type a Task Status value in the <b>Status name</b> text box. You can specify upto 15 Task Status values. The values that you specify here will appear in the <b>Status Fields</b> panel of the <b>Task</b> dialog box and the <b>Task Status Fields</b> panel of the <b>Mass Update</b> dialog box.	
Lock task and entries	Check this check box if you want to lock the task time and expense entries when this status is selected from the <b>Status Fields</b> panel in the <b>Task</b> dialog box. Note: When an entry is locked, Office Timesheets will not allow you to make any changes to the entry.	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. NOTE: If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. TIP: If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

## **Customizing Entry Status Values**

When making a time entry, you can indicate the status of the entry, by selecting a value from the Status Fields panel in the Time Entry dialog box. (You can also update the Time Entry Status by using the drop-down lists of the Entry Status Fields panel in the Mass Update dialog box.)

The values in the Entry Status Fields panel are user-defined. As a systems administrator, Office Timesheets allows you to specify upto 15 Time Entry Status values. To customize or set up Time Entry Status values:

1. Click on Customize Entry Status Fields in the Process Management tab.

The Customize Entry Status Fields screen will appear.

0	View Sheets	Import / Exp	ort Reports	Process Manageme	nt Syste	m Configuration	n	Account Administration
6 E	imployee Gement items Xpense Edit	Holidays Pro	Task Rules Approval Process Reporting Periods cess	Define Elements	Custom Fields Task Rate Fields Customize Ta	sk Status Fields Customize	1.9 1.9	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Cus	tomize Entry Sta	atus Fields						
1.	Billable Overtime		Status name		_	Lock		
3. 4. 5.	Overtime_Shift D Overtime_Shift D	lifferential 1 lifferential 2						
6. 7. 8.								
9. 10. 11.								
12. 13. 14.								
15.						Reset Sav	e	

2. Add upto 15 status values in the text boxes.

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- 3. Choose whether to lock entries for any of the status values.
- 4. Click the Save button to save the changes that you have made.

The following table provides more details about the components of the Customize Entry Status Fields screen:

Item	How to use the Item	Default Value (if any)
Status name	Type an Entry Status value in the text box. You can specify upto 15 Entry Status values. The values that you specify here will appear in the <b>Status Fields</b> panel of the <b>Time</b> <b>Entry</b> dialog box and the <b>Entry Status Fields</b> panel in the <b>Mass Update</b> dialog box.	
Lock	Check the Lock check box if you want to lock the time entry when this status is selected from the Status Fields panel of the Time Entry dialog box or from the Entry Status Fields panel in the Mass Update dialog box. Note: When an entry is locked, Office Timesheets will not allow you to make any changes to the entry.	
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. Note: If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to	

Item	How to use the Item	Default Value (if any)
	always click the <b>Save</b> button before you move away from the page.	
	<b>TIP:</b> If you do not want to save your changes, move to some other page <i>without</i> clicking the <b>Save</b> button.	

## **Customizing Approval Status Values**

When making a time entry, you can indicate the approval status of the entry, by selecting a value from the Approval Status drop-down list in the Time Entry dialog box. (You can also update the approval status by using the Approval Status drop-down list in the Mass Update dialog box.)

The values in the Approval Status drop-down list are user-defined. As a systems administrator, Office Timesheets allows you to specify up to 15 Approval Status values. To customize or set up Approval Status values:

1. Click on Customize Approval Status Fields in the Process Management tab.

The Customize Approval Status Fields screen will appear.

yee nt items ise t ize Approval S timesheet statu omitted oroved	Holdays	Tasi App Rep Process	k Rules roval Process orting Periods Status name	Define Elements	Cu 2, Ta 22 Cu	stom Fiel sk Rate F stomize T	ds ields ask Status Fields Customize Lock	Custor	mize Entry Status mize Approval Sta lables Color	Fields atus Fields
ise t lize Approval S timesheet statu omitted proved	itatus Fields	Process	orting Periods		<b>:</b> 2 Cu	stomize T	ask Status Fields Customize	Rate T	Color	
t ize Approval S timesheet statu omitted proved	itatus Fields	Process	Status name				Lock		Color	
timesheet statu omitted proved	itatus Fields	3	Status name				Lock		Color	
timesheet statu mitted proved	8		Status name				Lock		Color	
timesheet statu mitted proved	8									
omitted proved								Blue	<b>M</b>	
proved							<b></b>	Black	<b>~</b>	
							<b>V</b>	Green	×	
ected								Red	~	
ubmitted						_		Black	×	
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						_		Black	M	
						_		Black	×	
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						-		Black		
						-		Black	~	
						-		Black	~	
						-		Black	~	
	ubmitted	ubmitted .	Jbmitted	Jonited	libritited	Jonited	Jonited	Jenited	Jamited   Bick   Bick	Jenited I Black M I Black

- 2. Add up to 15 status values in the text boxes.
- 3. Choose whether to lock entries for any of the status values.
- 4. Select a color for each of the defined status values.
- 5. Click the Save button to save the changes that you have made.

The following table provides more details about the components of the Customize Approval Status Fields screen:

Item	How to use the Item	Default Value (if any)
Status name	Type an Approval Status value in the text box. You can specify upto 15 Approval Status values. The values that you specify here will appear in the <b>Approval Status</b> drop- down list of the <b>Time Entry</b> and <b>Mass Update</b> dialog boxes.	
Lock	Check this check box if you want to lock the time entry when this status is selected from the <b>Approval Status</b> drop-down list. Note: When an entry is locked, Office Timesheets will not allow you to make any changes to the entry.	
Color	From the <b>Color</b> drop-down list, select the color to be used for the time and expense entries (in the timesheets and expense sheets) when this status value is selected from the <b>Approval Status</b> drop-down list.	Black
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page without clicking the <b>Save</b> button.	

## **Defining Rate Table Labels**

Office Timesheets contains five employee rate tables. These rate tables appear in the Rates panel of the Employee dialog box.

By default, the rate tables are labeled A thru E. However, you can give your own names for these tables. To define or set up Rate Table labels:

1. Click on Rate Tables in the Process Management tab.

The Define Rate Tables screen will appear.

	View Sheets	Import	/ Expor	t Reports	Process Mana	gemen	System Configuration	1	Account Administration
(S) (S)	Employee Element items Expense	Holidays	2 1 2 4	fask Rules Approval Process Reporting Periods	Sefine Elements	2 2	Custom Fields Task Rate Fields Customize Task Status Fields	:	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
	Edit		Proce	555			Customize		
De	fine Rate Tables								
A. B. C. D.	Pay Rate Overhead Cost Billing Shift Differential 1								
E. [	Shift Differential 2								
				Res	et Save				

- 2. Specify the Rate Table labels in the text boxes.
- 3. Click the Save button to save the changes that you have made.

The following table provides more details about the components of the Define Rate Tables screen:

Item	How to use the Item	Default Value (if any)
А.	Type the name for the first rate table	А
В.	Type the name for the second rate table	В
С.	Type the name for the third rate table	С
D.	Type the name for the fourth rate table	D
E.	Type the name for the fifth rate table	Е
The Reset button	Click the <b>Reset</b> button to undo your changes and restore the values entered in the fields back to what they were when you <i>last</i> saved the page.	
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some other page without clicking the <b>Save</b> button.	

# **Holidays and Holiday Groups**

Office Timesheets allows you to create Holiday Groups and add holiday entries to these groups. You can then assign these Holiday Groups to Employees, and set certain rules around those holidays. When you assign a Holiday Group to an Employee, the holidays which are members of the Holiday Group can be displayed on the employee's timesheets.

Holiday Groups are useful for organizations that have offices in different parts of the world. You could create a different Holiday Group for each office that is in a different country, listing the holidays of that country. You can then quickly assign the list of holidays to employees from an office in a particular country, by assigning the Holiday Group to each of those employees. (See Adding an Employee entry for more information on assigning a Holiday Group to an employee.)

Note: You can assign a Holiday Group to an employee using the Employee panel of the Employee dialog box.

Use the Holidays screen to set up the List of Holidays and Holiday Groups:

Employee Element items Element items Edit Edit Edit Element items Holidays Process	rss Custom Fields customize Entry Status Fields ds Define Elements customize Task Status Fields customize Approval Status Fields customize Approval Status Fields customize Customize Approval Status Fields Customize Customize Customize Approval Status Fields Customize Customize C
Holidays	
Holiday Groups	Holidays
(Ai) Austalia Canada UK - Sociand UK-Sociand United Kingdom England and Wales United States	Add     Anaze Day (AUS)     Adjaut (UK) (Righand and Yules)       August (UK) (Righand and Yules)     August (UK) (Scotland)       August (UK) (Scotland)     August (UK) (Scotland)       Battie of the Boyne (UK) (Dichtern Freiand)     Battie of the Boyne (UK) (Dichtern Freiand)       Boxtip Day (UK) (Scotland)     Delete       Boxtip Day (UK) (Scotland)     Canada Day (UK) (Scotland)       Christmas (UK) (Scotland)     Christmas (UK)       Easter Monday (UK) (Scotland)     Christmas (UK)       Good

The following table provides more details about the components of the Holidays screen:

Item	How to use the Item	Default Value (if any)
The Holiday Groups panel	Lists all the Holiday Groups that have been defined. When you click on a Holiday Group in this panel, the list in the <b>Holidays</b> panel will change to show only those holidays which belong to the selected group.	
The Add Button	Click the <b>Add</b> button to create a new Holiday Group.	
The Open Button	Select a Holiday Group from the list and click the <b>Open</b> button to view or change the details of the Holiday Group.	
The Delete Button	Select a Holiday Group from the list and click the <b>Delete</b> button to delete the selected Holiday Group. Note: Only the group gets deleted. The holidays that are members of the group do not get deleted.	
The Holidays panel	Lists all the Holidays that have been defined.	
The Add Button	Click the <b>Add</b> button to create a new Holiday entry.	
The Open Button	Select a Holiday from the list and click the <b>Open</b> button to	

Item	How to use the Item	Default Value (if any)
	view or change the details of the Holiday.	
The Delete Button	Select a Holiday from the list and click the <b>Delete</b> button to delete the selected Holiday.	

### **Creating a Holiday Entry**

To create a Holiday entry:

1. Click on Holidays in the Process Management tab.

The Holidays screen will appear.

View Sheets	Import / Export F	Reports Process Managemen	t System Configuration	Account Administr	ation
Employee Element items Expense Edit	Holidays	les I Process g Periods Define Elements :2	Custom Fields Task Rate Fields Customize Task Status Fields Customize	Customize Entry Sta	tus Fields Status Fields
Holidays					
— Holiday Groups —		H	lidays		
(Al) Australia Canada UK - Northern Ireland UK - Scotland Unted Kingdom - Englan United Kingdom - Englan United States	nd and Wales	Add Araza Open Augu Augu Delete Batte Boxin Christ Christ Christ Boxin B	Day (AUS) t (UK) (England and Wales) tt (UK) (Iorthern Ireland) tt (UK) (Iorthern Ireland) tt (UK) (Soctand) ala Day (AUS) g Day (UK) (Iorthern Ireland) g Day (UK) (Iorthern Ireland) g Day (UK) (Soctand) mas Day (CN) Monday (UK) (England and Wales) mas Day (CN) Monday (UK) (England and Wales) Friday (CN) Friday (CN)	land) =	Add Open Delete

2. Click the Add button in the Holidays panel.

The Holiday dialog box will appear.

Show		

- 3. In the Name box, type a unique name for the Holiday entry.
- 4. Check the Date Range check box if the holiday extends to two or more days. If the Holiday only lasts for one day then leave this box unchecked.
- 5. Check the Indicate on Views check box if you want the holiday to be displayed on the Timesheet and the Expense sheet.

**Note:** If you check the Indicate on Views check box, the day(s) of the holidays of the group will be shown with a blue shading on the Timesheet and Expense sheet.

- 6. In the Date field, specify the date of the holiday using the date picker.
- 7. In the Through field, specify the last date of the holiday using the date picker.

Note: The Through field appears only if you have checked the Date Range check box.

- 8. Check the Lock Dates check box if you want to disallow any time entries for the duration of the holiday. If the Lock Dates check box is checked, Office Timesheets will not allow the user to make any time entries on any of the holiday's dates.
- 9. Click on the Groups button to display the Groups panel of the Holiday dialog box.

Save & New	Holiday	Groups	
Actions	Sh	ow	
Australia Canada UK - Northern Ireland UK - Scotland United Kingdom - England and Wales	Re	Add	United States

TIP: Click on the Holiday button if you want to go back to the Holiday panel.

Use the Groups panel to add the holiday to one or more existing Holiday Groups.

10. To add the holiday to an existing group, select the group name in the Is not a member of panel and click the Add button.

The group name will shift from the Is not a member of panel to the Is a member of panel.

**TIP:** To add the holiday to multiple groups, you can select multiple group names before clicking the Add button. To do this, in the Is not a member of panel, click on a group name and then hold down the Ctrl key and click on the names of the other groups that you want to add the holiday to. Then, release the Ctrl key and click the Add button.

11. To remove the holiday from a group, select the group name in the Is a member of panel and click the Remove button.

The group name will shift from the Is a member of panel to the Is not a member of panel.

**TIP:** To remove the holiday from multiple groups, you can select multiple group names before clicking the Remove button. To do this, in the Is a member of panel, click on a group name and then hold down the Ctrl key and click on the names of the other groups that you want to remove the holiday from. Then, release the Ctrl key and click the Remove button.

12. Finally, do one of the following...

Do this	То
Click the Save & New button	Save this Holiday entry and start creating a new Holiday entry.
Click the Save & Close button	Save this Holiday entry and return to the <b>Holidays</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Holiday</b> dialog box	Return to the <b>Holidays</b> screen without saving the new Holiday entry.

#### Viewing or Making Changes to a Holiday Entry

To view or make changes to a Holiday entry:

1. Click on the **Holidays** icon in the Process Management tab.

The Holidays screen will appear.



2. In the Holidays panel, select a Holiday and click the **Open** button.

The Holiday dialog box will appear.

- 3. Make the required changes to the Holiday entry. (See Creating a Holiday Entry for more details about the parts of the Holiday dialog box.)
- 4. Finally, do one of the following...

Do this	То
Click the Save & New button	Save the changes to the Holiday entry and start creating a new Holiday entry.
Click the Save & Close button	Save the changes to the Holiday entry and return to the <b>Holidays</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Holiday</b> dialog box	Return to the <b>Holidays</b> screen without saving your changes.

#### **Deleting a Holiday Entry**

To delete a Holiday entry:

1. Click on the **Holidays** icon in the Process Management tab.

The Holidays screen will appear...

View Sheets	Import / Export	Reports Process Man	agement System Configu	ration Account Admin	istration
Element items Element items Expense Edit	Holidays	Rules oval Process rting Periods Define Element	Custom Fields Task Rate Fields Customize Task Status Fi Customi	Customize Entry	Status Fields val Status Fields
Holidays			Holidays		
(Al) Australia Canada UK - Sociland UK - Sociland Unted Kingdom - England Unted Kingdom - England	I and Wales	Add Open Delete	Anzac Day (AUS) August (UK) (England and Wale August (UK) (England and Wale August (UK) (England and Wale August (UK) (Enother Boxing Day (AUS)) Boxing Day (UK) (Boxing Boxing Day (UK) (Boxing Boxing Day (UK) (Boxing Boxing Day (UK) (Boxing Boxing Day (UK) (Boxing Christmas (UK) (England and W Christmas (UK) (Boxing Christmas (UK) (Boxing Christmas (UK) (Boxing Christmas (UK) (Boxing Christmas (UK) Christmas	s) A sin reland) E sin reland) E sin reland) E sin reland) A sin reland) A sin reland) E sin reland)	Add Open Delete

2. In the Holidays panel, select a Holiday and click the **Delete** button.

Office Timesheets will display the following message:



3. Click **OK** to delete the Holiday entry; or click **Cancel** if you do not wish to delete the Holiday entry.

#### **Creating a Holiday Group Entry**

Once you have created the Holiday entries, you need to allot them to one or more Holiday Groups. You can then assign these Holiday Groups to employees, so that the holidays appear on their Timesheets and Expense sheets.

Holiday Groups are also useful for organizations that have offices in different parts of the world. You could create a different Holiday Group for each office that is in a different country, listing the holidays of that country. You can then quickly assign the list of holidays to employees from an office in a particular country, by assigning the Holiday Group to each those employees. (See Adding an Employee entry for more information on assigning a Holiday Group to an employee.)

To create a Holiday Group entry:

1. Click on the Holidays icon in the Process Management tab.

#### The Holidays screen will appear...



2. Click the **Add** button in the Holiday Groups panel.

The Holiday Group dialog box will appear...

Actions Group Name Not in group Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Scotland) Australia Day (AUS) Battle of the Boyne (UK) (Northern Irela Boxing Day (AUS) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Conthern Ireland) Partier Day (UK) (Northern Ireland) Example to the Boyne (UK) (Northern Ireland) Exa	Save & New Cancel Save & Close	~
Group Name  Not in group  Anzac Day (AUS)  August (UK) (England and Wales)  August (UK) (Soctland)  Australia Day (AUS)  Battle of the Boyne (UK) (Northern Ireli Boxing Day (AUS)  Boxing Day (UK) (England and Wales)  Boxing Day (UK) (Ingland and Wales)  Boxing Day (UK) (Northern Ireland)  Evide Day (UK) (Borthern Ireland)  Evide Day (UK) (Ingland and Wales)  Evide Day (Ingland a	Actions	
Not in group Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Northern Ireland) August (UK) (Soctiand) Australia Day (AUS) Battle of the Boyne (UK) (Northern Irele Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Shorthern Ireland) Boxing Day (UK) (Shorthern Ireland) Boxing Day (UK) (Shorthern Ireland)	Group Name	
Not in group Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Northern Ireland) August (UK) (Soctiand) Battle of the Boyne (UK) (Northern Irels Boxing Day (AUS) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Shorthern Ireland) Box		
Not in group		
Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Scotland) August (UK) (Scotland) Australia Day (AUS) Battie of the Boyne (UK) (Northern Irela Boxing Day (UK) (England and Wales) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland)	— Not in group —	In group
Battie of the Boyne (UK) (Northern Irek Boxing Day (AUS) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland)	Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Northern Ireland) August (UK) (Scotland) Australia Day (AUS)	Add
Boxing Day (AUS) Boxing Day (CN) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Northern Ireland)	Battle of the Boyne (UK) (Northern Irela	
Boxing Day (CN) Boxing Day (UK) (England and Wales) Boxing Day (UK) (Northern Ireland) Boxing Day (UK) (Contend )	Boxing Day (AUS)	Remove
Boxing Day (UK) (Conthern Ireland)	Boxing Day (CN) Boxing Day (UK) (England and Wales)	
Pauling Days (UK) (Castland)		
Doxing Day (UK) (Scotland)	Boxing Day (UK) (Northern Ireland)	

- 3. In the Group Name box, type a unique name for the Holiday Group entry.
- 4. To add holidays to the group, select the holiday name in the Not in group panel and click the **Add** button.

The group name will shift from the Not in group panel to the In group panel.

**TIP:** To add multiple holidays to the group, you can select multiple holiday names before clicking the Add button. To do this, in the Not in group panel, click on a holiday name and then hold down the Ctrl key and click on the names of the other holidays that you want to add to the group. Then, release the Ctrl key and click the Add button.

5. To remove a holiday from the group, select the holiday name in the Not in group panel and click the **Remove** button.

#### The group name will shift from the Not in group panel to the In group panel.

**TIP:** To remove multiple holidays from the group, you can select multiple holiday names before clicking the Remove button. To do this, in the In group panel, click on a holiday name and then hold down the Ctrl key and click on the names of the other holidays that you want to remove from the group. Then, release the Ctrl key and click the Remove button.

#### 6. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save this Holiday Group entry and start creating a new Holiday Group entry.
Click the Save & Close button	Save this Holiday Group entry and return to the <b>Holidays</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Holiday</b> dialog box	Return to the <b>Holidays</b> screen without saving the new Holiday Group entry.

#### Viewing or Making Changes to a Holiday Group Entry

To view or make changes to a Holiday Group entry:

1. Click on the **Holidays** icon in the Process Management tab.

The Holidays screen will appear ...

Edt     Process     Customize       Holidays	View Sheets Import / Export	Reports         Process Management           Rules         Image: Constraint of the second secon	System Configuration Account Administration Custom Fields Task Rate Fields Customize Task Status Fields Participation Customize Approval Status Fields Customize Task Status Fields Participation Customize Task Status Fields
Holidays         Holidays         Holidays         Add       Azara Cay (AUS)         Australia       Open         UK - Soctiand       Open         UK - Soctiand       Delete         Delete       Bexing Day (UK)         Boxing Day (UK)       (Korthern reland)         Christmas Day (KuS)       <	Edit Process		Customize
Easter Monday (UK) (England and Wales) Easter Monday (UK) (Northern ireland) Easter Saturday (AUS)	Holiday Groups Holiday Groups (Al) Australia Canada UK - Sociand UK - Sociand UN+ Sociand United Kngdom - England and Wales United States	Add August August August August August Berry Boxing Boxing Boxing Boxing Boxing Boxing Boxing Boxing Boxing Cranada Cristem Cristem Cristem Cristem Easter H Easter State Stat	Idays

2. In the Holiday Groups panel, select a Holiday and click the **Open** button.

The Holiday Group dialog box will appear...

Save & New Cancel		
Actions		
Group Name		
United States		
- Not in group	In group	
Anzac Day (AUS) August (UK) (England and Wales) August (UK) (Northern Ireland) August (UK) (Soctland) Australia Day (AUS) Baxing Day (AUS) Boxing Day (AUS) Boxing Day (CN) Boxing Day (CN)	Add Christmas (US) Independence Day (US) Labor Day (US) Martin Luther King Day (US) Memorial Day (US) New Year's (US) New Year's (US) Thankgiving (US)	

- 3. Make the required changes to the Holiday Group entry. (See Creating a Holiday Group Entry for more details about the parts of the Holiday Group dialog box.)
- 4. Finally, do one of the following...

Do this	То
Click the Save & New button	Save the changes to the Holiday Group entry and start creating a new Holiday Group entry.
Click the Save & Close button	Save the changes to the Holiday Group entry and return to the <b>Holidays</b> screen.
Click the <b>Cancel</b> button or the	Return to the <b>Holidays</b> screen without saving your changes.

Do this	То
<b>Close</b> button on the top right corner of the <b>Holiday</b> <b>Group</b> dialog box	

#### **Deleting a Holiday Group Entry**

To delete a Holiday Group entry:

1. Click on the Holidays icon in the Process Management tab.

The Holidays screen will appear...

View Sheets	Import / Export	Reports Process	lanagement System Cor	figuration Account Ad	ministration
<ul> <li>Employee</li> <li>Element items</li> <li>Expense</li> <li>Edit</li> </ul>	Holidays 72 Tas	k Rules iroval Process porting Periods	Custom Fields Customize Fields Customize Task Sta Customize Task Sta	tus Fields : Rate Tables	ntry Status Fields pproval Status Fields
Holidays					
Holiday Groups –		Add	Holidays Anzac Day (AUS) August (IK) (England and	Wales)	Add
Canada UK - Northern Freiand UK - Soctand Unhed Kngdom - Engler Unhed States	nd and Wales	Delete	August (UK) (terthern trey August (UK) (Sestend) Australa Day (AUS) Bate of the Skywe (UK) (Di Bate) of the Skywe (UK) (Di Bate) (Di Bate) (Di Bate) Bate) (Di Bate) (Di Bate) Bate) (Di Bate) (Di Bate) Bate) (Di Bate) (Di Bate) Christmas (UK) (Sestend Christmas (UK) (Ses	and) Korthern Ireland) and Wales) Ireland) nd Wales) end and Wales) ern Ireland)	Delete

2. In the Holiday Groups panel, select a Holiday Group and click the **Delete** button.

Office Timesheets will display the following message:



3. Click **OK** to delete the Holiday Group entry; or click **Cancel** if you do not wish to delete the Holiday Group entry.

**NOTE:** You cannot delete a group that has some holidays assigned to it. If you try to delete such a group, Office Timesheets will display the following message:



To delete such a group, you will first have to remove the holidays from the group. (See Viewing or Making Changes to a Holiday Group entry for more details on how to remove a holiday from a group.)

## **Defining Task Rules and Dependencies**

Task rules control how tasks are created within Office Timesheets. They require that certain task element levels be included during task creation. This ensures that a company's rules for proper task creation are enforced.

Using element level dependencies, you can specify the order of the elements available for task creation where each element depends upon a previously entered element level. Essentially, dependencies allow you to define what elements can and cannot be used for creating tasks based on previous element level selections. This helps companies enforce certain policies for creating tasks and reduces errors by not allowing individuals to create incorrect tasks.

**TIP:** The Task Rules screen allows you to only define the element level dependencies. In other words, it allows you to select the order of the elements in a Task entry. You have to also define the actual element item entries that can be used for a particular task. To do this, specify them as dependencies in the Dependencies panel of the corresponding Element Item entry. For example, if Client depends on Employee, then for each employee, in the dependencies panel of the Employee dialog box, you will have to select the Client or Client Group entries that the employee can use in his/her Task entries.

To define Task Rules and Dependencies:

1. Click on **Task Rules** in the Process Management tab.

The Task Rules screen appears.

	pendent on Requires level	Define Elements
Task Rules Use level dependency rules Use required rules Order Evel order Employee No Client Emp Project Phase No Sub-task No Cost Center No	pendent on Required Participation Required Pa	uired Move Up Move Down
Use level dependency rules Use required rules Order Evel order Employee No Client Emp Project Phase No Sub-task No Cost Center No	pendent on Required in Require	uired Move Up Move Down
Levelorder Dep Employee No Client Emp Project Emp Phase No Sub-task No Cost Center No	pendent on Required R	Move Up
Employee No Client Emp Project Emp Phase No Sub-task No Cost Center No	nployee	Move Down
Client Emp Project Emp Phase No Sub-task No Cost Center No	nployee 💉 🔽	2
Project Emp Phase No Sub-task No Cost Center No		
Phase No Sub-task No Cost Center No	ipioyee	4
Sub-task No Cost Center No	ievel 💌	
Cost Center No	level M	
	level 🖌	
Expense No.	level M	
		Save

- 2. Specify the order and dependency of the elements. You can also indicate which are required elements.
- 3. Click the **Save** button to save the Task Rules and Dependencies that you have defined.

**NOTE:** If tasks and entries were created in Office Timesheets before defining required rules and dependencies, any future editing of such tasks or entries will enforce the established task rules and dependencies. For example, you have just made Client a required level, and you have a time entry which contains no client. In future, when you edit this time entry, Office Timesheets will not let you save it until you select a Client.

The following table provides more details about the components of the Task Rules screen:

Item	How to use the Item	Default Value (if any)	
Use level dependency rules	Check the <b>Use level dependency rules</b> check box if you want Office Timesheets to enforce the level dependency rules that you have defined. If level dependency rules are enforced, then while making a Task entry, Office Timesheets will not allow you to select an item until the item that it depends on has been selected. For example, if you have specified that "Project" depends upon "Client", while making a Task entry, Office Timesheets will not allow you to select a Project until you first select a Client. <b>NOTE:</b> If you uncheck the <b>Use level dependency rules</b> check box, Office Timesheets will not enforce the level dependency rules even though you may have defined them.		
Use required rules	Check the <b>Use required rules</b> check box if you want Office Timesheets to enforce the required rules that you have defined. For example, if you specify that 'Client' is required, Office Timesheets will not allow you to save a task entry if you have not selected a 'Client'. Since 'Client' is required, you will be able to save the entry only after you have selected a Client. <b>NOTE:</b> If you uncheck the <b>Use required rules</b> check box, Office Timesheets will not enforce the required rules even though you may have defined them.		
The Order panel	The <b>Order</b> panel displays all the elements that you have defined in the <b>Define Elements</b> screen. Using the buttons in the <b>Order</b> panel, you can define the order of the elements. You can also specify the level dependency and required rules.		
Level order	All the elements of a task that you have defined in the <b>Define</b> <b>Elements</b> screen appear in this column. You can specify the order in		

Item	How to use the Item			
	which the elements should appear in the <b>Task</b> dialog box. The order you select affects the way in which level dependencies are defined. For example, if Project is dependent on Client, then Client must appear before Project in the level order.			
Dependent on	For example, if Project is dependent on Client, then Client must appear before Project in the level order. If an element depends on some other element, from the <b>Dependent on</b> drop-down list for that element, select the name of the other element. For example, if Project depends on Client, select Client from the <b>Dependent on</b> drop-down list of Project. Note: An element can be dependent upon any element that appears before (i.e. above) it in the <b>Order</b> panel and not necessarily the element that just precedes it. For example, in the above figure, we can specify that Cost Center is dependent on Client. For any element, the <b>Dependent on</b> drop-down list contains the names of the elements that appear before (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> drop-down list contains the names of the elements that appear before (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> Required (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> required (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> Required (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> required (above) it in the <b>Order</b> panel. For any element, the <b>Dependent on</b> Required (above) it in the <b>Order</b> panel. For element <b>Dependent on</b> required (above) it in the <b>Order</b> panel. For element <b>Dependent on</b> drop-down list (above) <b>Dependent on</b> drop-down list of the set <b>Dependent on</b> drop-down list if you want to remove a previously defined dependency. For example, if you had earlier specified that Project is dependent, on Client, but now decide that that dependency is no longer required, select 'No level' from the <b>Dependent on</b> drop-down list of the Project is dependent.			

Item	How to use the Item			
Required	Check the <b>Required</b> check box next to an element, to indicate that it is a required element. For example, if you specify that 'Client' is required, while making a Task entry, Office Timesheets will not allow you to save the entry if you have not selected a 'Client'. Since Client is required, you will be able to save the entry only after you have selected a Client. <b>NOTE:</b> The <b>Required</b> check box is graved out for <b>Employee</b> .			
	This is because an Employee is always required for a Task entry.			
The Move Up button	Click on the name of any element and then click the <b>Move Up</b> button to move the element one position higher in the level order.			
The Move Down button	Click on the name of any element and then click the <b>Move Down</b> button to move the element one position lower in the level order.			
The Save button	Click the <b>Save</b> button to save any changes you make to the page. <b>NOTE:</b> If you move to some other page before clicking the <b>Save</b> button, the changes you have made will be discarded. Therefore, remember to always click the <b>Save</b> button before you move away from the page. <b>TIP:</b> If you do not want to save your changes, move to some			
	other page <i>without</i> clicking the <b>Save</b> button.			

# **Understanding Approval Process Workflows**

At the end of a reporting period, employees usually submit their Timesheets and Expense sheets to their manager. The manger then reviews each employee's entries for the reporting period and approves or rejects the Timesheet or Expense sheet. The Office Timesheets approval process allows an employee to electronically submit a Timesheet or Expense sheet to their manager. The manager can then track and manage the employee's Timesheets or Expense sheets in Office Timesheets.

The approval process consists of a series of approval process steps that an Office Timesheets administrator defines. You can make an approval process step follow one or more previously defined approval process steps to create a workflow. The workflow creates a sequence of approval process steps that an employee's Timesheet or Expense sheet must complete before it meets your company's requirements for final timesheet approval.

The Office Timesheets approval process allows an employee to electronically submit a timesheet to the manager. The manager can then track and manage the employee's timesheets in Office Timesheets.

Office Timesheets allows you to:

- define the steps in the approval process;
- define the order of the steps in the approval process;
- specify whether to lock the entries once a step has been applied;
- send email notifications to the employees and/or group managers;
- set one or more Time Entry Status fields when a step has been applied; and
- set one or more Expense Entry Status fields when a step has been applied.

### Managing your Approval Process Workflow

The approval process consists of a series of approval process steps that an Office Timesheets administrator defines. You can make an approval process step follow one or more previously defined approval process steps to create a workflow. The workflow creates a sequence of approval process steps that an employee's timesheet must complete before it meets your company's requirements for final timesheet approval.



Use the Approval Process screen to manage your Approval Process Workflow.

The following table provides more details about the components of the Approval Process screen:

Item	How to use the Item	Default Value (if any)
The Approval Steps panel	The list box in this panel contains a list of all the approval steps defined so far (in alphabetical order).	
The Add button	Click the <b>Add</b> button to add a new approval step to the workflow.	
The Open button	Select an approval step in the list box and click the <b>Open</b> button to view or make changes to the approval step.	
The Delete button	Select an approval step in the list box and click the <b>Delete</b> button to delete the approval step.	

#### Adding an Approval Step Entry

The approval process consists of a series of approval process steps that an Office Timesheets administrator defines. You can make an approval process step follow one or more previously defined approval process steps to create a workflow. The workflow creates a sequence of approval process steps that an employee's timesheet must complete before it meets your company's requirements for final timesheet approval.

To add an Approval Step entry:

1. Click on **Approval Process** in the Process Management tab.

The Approval Process screen appears...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Element items Element items Edit	Holidays Process	Define Elements	ustom Fields ask Rate Fields	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Approval Process				
Approval Steps -				
Approved Rejected Re-Submitted Submitted	(	Add Open Delete		

2. Click the **Add** button.

The Approval Step dialog box appears...

Approval Step			X		
Save & New Save & Close	Definition	Email Notifications	Time entries		
Occurred Dataila		VICTV			
General Details					
Name					
Follows					
Approved Rejected Re-Submitted					
Follows the "auto status" times	heet status				
Lock Options					
Do not set Employee lock date					
Set Employee lock date to end	of period	ariad			
Set Employee lock date to end	or previous p	enou			
Availability					
Available to Employee manage Available to Employee	rs				
Electronic Signatures					
This step has no Employee's e	electronic sig	nature			
Requires Employee's electronic	ic signature				
O Undo Employee's signature with the second seco	nen this step	is applied			

- 3. Type a unique name for the Approval Step in the Name text box.
- 4. In the Follows panel, specify where the current step will appear in the entire approval process workflow.

**NOTE:** While marking the timesheet for approval, as each step is applied, the step that has been defined to follow the last applied step will appear in the Action drop-down list of the Approval Process dialog box. For example, when the employee first marks the timesheet for approval, only those steps that have been defined to 'follow the "auto status" timesheet status' will appear in the drop-down list. Then, when the manager views the Action drop-down list, only those steps that have been defined to follow the first step will be visible in the drop-down list, and so on.

- 5. If the step you are currently defining is the first step in the approval process workflow, check the Follows the "auto status" timesheet status check box. The "auto status" timesheet status is the default status that is assigned to a timesheet before any of the approval steps have been applied. Thus, the first approval step will always have to follow the "auto status" timesheet status.
- 6. If the step you are currently defining is not the first step in the approval process workflow, from the Follows list box, select the step that comes before the current step. For example, if you are currently defining the fourth step, select the third step in the Follows list box. This indicates to Office Timesheets that the step you are currently defining comes after the third step.

**TIP:** At times, you may want the step you are currently defining to appear after some previously defined step (or steps) as well as in the first step of the approval process workflow. For example, you may want the current step that you are defining to appear after the third step as well as in the first step of the approval process. In such a situation, select the third step in the Follows list box and also check the Follows the "auto status" timesheet status check box.

7. In the **Lock Options** grouping, specify whether the Employee should be prevented from adding entries to the timesheet once he/she has applied this approval process step in the **Approval Process** dialog box. Click on one of the following:

Click on	То
Do not set Employee lock date	Leave the Employee lock date as it is. Do not change the Employee lock date. <b>NOTE:</b> When the Employee lock date is set, Office Timesheets will not allow the Employee to make any entries in the timesheet for dates that fall prior to the lock date.
Set Employee lock date to end of period	Prevent the employee from making any more entries in the timesheet for the current period.
Set Employee lock date to end of previous period	Prevent the employee from making any more entries in the timesheet for the previous period. The employee can still make entries in the timesheet for the current period.

8. In the **Availability** grouping, select whether the step you are currently defining is available only for employees, only for managers or for both employees and managers.

Check	To indicate that
Available to Employee managers	This step is available only to those users who have been defined as Managers. (See <b>Employees and Employee Groups</b> for more information about assigning managerial status to an Employee.)
Available to Employee	This step is available only to Employees and not to Managers.

**TIP:** Check both the check boxes if you want the step to be available to both Employees as well as Managers.

### Specifying the Email Notification Settings

9. Click on the **Email Notifications** button to view the Email Notifications panel.

In the Email Notifications panel you can specify whether the employee and/or group manager(s) need to be notified when this step is applied during the approval process. You can also type the contents of the email that will be sent.

The following table describes the various items in the Email Notifications panel:

Item	How to use the Item			Default Value (if any)
Employee Notifications panel	Use the contents of this panel to specify whether a notification has to be sent to the employee and to type the contents of the notification.			
Notify Employee when step is applied	Check the <b>Notify Employee when step is applied</b> check box if you want a notification to be sent to the employee when this step is applied. For example, if the step you are defining is for managers, when this step is applied by a manager, a notification could be sent to the employee, so that the employee gets to know about the status of the timesheet.			
	While preparing the notification message, select a token from the <b>Token</b> drop-down list to insert it into the subject or body of the message. The <b>Token</b> drop-down list contains the following tokens—			
	Token	Appears on the screen as	What happens to it when the message is sent	
	Employee Name	[Employee Name]	Will get replaced with the employee's name	
	Manager Name	[Manager Name]	Will get replaced with the manager's name.	
	Start Date	[Start Date]	Will get replaced with the starting date of the Reporting Period.	
Token	End Date	[End Date]	Will get replaced with the ending date of the Reporting Period.	
	Туре	[Type]	Will get replaced with the type of sheet (i.e. Time or Expense).	
	NOTE: insert i messag Merge softwa Timesl token y if you t Name t Name] messag the me	A <b>Token</b> is a sp nto the subject ge. Tokens are s Codes used in y re's Mail Merge neets sends the with the value o ype "Dear " and coken, you will s " on your screen ge is sent to an e ssage it will app	pecial code that you can and body of the similar to Merge Fields or your Word Processing feature. When Office message, it replaces the of the token. For example, l insert the Employee see "Dear [Employee n. However, when this employee (say, Chris), in pear as "Dear Chris".	
Email Subject	Type the s	ubject of the no	tification message.	

Item	How to use the Item	Default Value (if any)
The Add Subject Token button	Select a token from the <b>Token</b> drop-down list and click the <b>Add Subject Token</b> button, to add the selected token to the <b>Email Subject</b> at the current cursor location.	
The Email body text box	Type the text of the notification message.	
The Add Message Token button	While typing the body matter of the notification message, select a token from the <b>Token</b> drop-down list and click the <b>Add Message Token</b> button, to add the selected token to the body of the message at the current cursor location.	
Group Manager Notifications panel	Use the contents of this panel to specify whether a notification has to be sent to the group manager and to type the contents of the notification.	
Notify group manager(s) when step is applied	Check the <b>Notify group manager(s) when step is</b> <b>applied</b> check box if you want a notification to be sent to the group manager(s) when this step is applied. For example, if the step you are defining is for employees, when this step is applied by an employee, a notification could be sent to the group manager, so that the manager gets to know about the status of the timesheet.	
Token	While preparing the notification message, select a token from the Token drop-down list to insert it into the subject or body of the message. The Token drop-down list to insert it into the subject or body of the message. The Token drop-down list to insert it into the subject or body of the message. The Token drop-down list contains the following tokens—TokenAppears on the screen asWhat happens to it when the message is sentEmployee[EmployeeWill get replaced with the employee's name.Manager[ManagerWill get replaced with the manager's name.NameStart Date[Start Date]Will get replaced with the starting date of the Reporting Period.End Date[End Date]Will get replaced with the ending date of the Reporting Period.Type[Type][Type of sheet (i.e. Time or Expense).	

Item	How to use the Item	Default Value (if any)
	<b>NOTE:</b> A <b>Token</b> is a special code that you can insert into the subject and body of the message. Tokens are similar to Merge Fields or Merge Codes used in your Word Processing software's Mail Merge feature. When <b>Office</b> <b>Timesheets</b> sends the message, it replaces the token with the value of the token. For example, if you type "Dear " and insert the Manager Name token, you will see "Dear [Manager Name]" on your screen. However, when this message is sent to a manager (say, Chris), in the message it will appear as "Dear Chris".	
Email Subject	Type the subject of the notification message.	
The Add Subject Token button	Select a token from the <b>Token</b> drop-down list and click the <b>Add Subject Token</b> button, to add the selected token to the <b>Email Subject</b> at the current cursor location.	
The Email body text box	Type the text of the notification message.	
The Add Message Token button	While typing the body matter of the notification message, select a token from the <b>Token</b> drop-down list and click the <b>Add Message Token</b> button, to add the selected token to the body of the message at the current cursor location.	

### Setting Time Entry Status Fields

10. Click on the **Time entries** button to view the Time entries panel.

Save & New Cancel	Definition Email Notifications
Actions	View
Time Entry Status Fields	
Set Time Entry Approval Status t	0 Leave as is
Billable	Leave as is 🔽
Overtime	Leave as is 💌
Overtime_Shift Differential 1	Leave as is 🔽
Overtime Shift Differential 2	Leave as is 💙

Use the Time entries panel to set any of the status fields of the Time Entry dialog box when this approval step is applied.

The following table describes the various items in the Time entries panel:

Item	How to use the Item	Default Value (if any)
	Specify whether the <b>Time Entry Approval Status</b> field should be changed, or left as is, when this approval step is applied. The <b>Set Time Entry</b> <b>Approval Status to</b> drop-down list contains the approval statuses that have been defined in the <b>Customize Approval Status Fields</b> screen.	
	<b>NOTE:</b> If you don't want the <b>Time Entry</b> <b>Approval Status</b> field to be changed, select "Leave as is" from the drop-down list.	
Set Time Entry Approval Status to	The rest of the items in the <b>Time entries</b> panel are the names of the user defined <b>Entry Status Fields</b> that you defined in the <b>Customize Entry Status</b> <b>Fields</b> screen. For each of these items, you can specify whether the status field in the <b>Time Entry</b> dialog box should be set (checked), unset (unchecked), or left as is, when this approval step is applied. The drop-down list for each of the items contains the following values—	
	ValueSelect this value toLeave asLeave the value of the entry status field unchanged.	

Item	How to use the Item	Default Value (if any)
	Yes Check the value of the entry status field. No Incheck the value of the entry status field.	
	<b>NOTE:</b> If you don't want the <b>Time Entry Status</b> field to be changed, select "Leave as is" from the drop-down list.	

### Setting Expense Entry Status Fields

Save & Close	Definition Email Notifications
Actions	View
Expense Entry Status Fields	
Set Expense Entry Approval Stat	tus to Leave as is
Billable	Leave as is 💟
Billable Overtime	Leave as is V Leave as is V
Billable Overtime Overtime_Shift Differential 1	Leave as is V Leave as is V Leave as is V

11. Click on the **Expense entries** button to view the Expense entries panel.

Use the Expense entries panel to set any of the status fields of the Expense Entry dialog box when this approval step is applied.

The following table describes the various items in the Expense entries panel:

Item	How to use the Item	Default Value (if any)
Set Expense Entry Approval Status to	Specify whether the <b>Expense Entry Approval Status</b> field should be changed, or left as is, when this approval step is applied. The <b>Set Expense Entry</b> <b>Approval Status to</b> drop-down list contains the approval statuses that have been defined in the <b>Customize Approval Status Fields</b> screen. <b>NOTE:</b> If you don't want the <b>Expense Entry</b>	

Item		How to use the Item	Default Value (if any)
	<b>Appro</b> "Leave	val Status field to be changed, select as is" from the drop-down list.	
	The rest o are the na that you d <b>Fields</b> scr whether t box should left as is, v drop-dow following	f the items in the <b>Expense entries</b> panel mes of the user defined <b>Entry Status Fields</b> efined in the <b>Customize Entry Status</b> een. For each of these items, you can specify he status field in the <b>Expense Entry</b> dialog d be set (checked), unset (unchecked), or when this approval step is applied. The n list for each of the items contains the values—	
	Value	Select this value to	
	Leave as is	Leave the value of the entry status field unchanged.	
	Yes	Check the value of the entry status field.	
	No	Uncheck the value of the entry status field.	
	NOTE: Status from t	If you don't want the <b>Expense Entry</b> field to be changed, select "Leave as is" he drop-down list.	

### Saving the Approval Step Entry

Once you have made all the selections (as described in the previous topics), do one of the following:

Do this	То
Click the Save & New button	Save this Approval Step entry and start creating a new Approval Step entry.
Click the Save & Close button	Save this Approval Step entry and return to the <b>Approval Process</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Approval Step</b> dialog box	Return to the <b>Approval Process</b> screen without saving the new Approval Step entry.

### Viewing or Making Changes to an Approval Step Entry
To view or make changes to an Approval Step entry:

1. Click on the **Approval Process** icon in the Process Management tab.

The Approval Process screen will appear...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee Element items Expense	Holdays	Define Elements	Custom Fields Task Rate Fields Customize Task Status Fields	Sustomize Entry Status Fields Customize Approval Status Fields Kate Tables
Approval Process	Flocess	Л <u>е</u>	Customize	
- Approval Steps -				
Approved Rejected Re-Submitted Submitted		Add Open Delete		

- 2. Select an Approval Step from the list box and click the **Open** button.
- 3. Make changes to the Approval Step entry. (See Adding an Approval Step entry for more information.)
- 4. Finally, do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes you have made to the Approval Step entry and start creating a new Approval Step entry.
Click the Save & Close button	Save the changes you have made to the Approval Step entry and return to the <b>Approval Process</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Approval Step</b> dialog box	Return to the <b>Approval Process</b> screen without saving the changes you have made to the Approval Step entry.

#### **Deleting an Approval Step Entry**

To Delete an Approval Step entry:

1. Click on the **Approval Process** icon in the Process Management tab.

The Approval Process screen will appear...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee Element items Expense Edit	Holidays Process	Define Elements	Custom Fields Task Rate Fields Customize Task Status Fields Customize	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Approval Process				
— Approval Steps –				
Approved Rejected Re-Submitted Submitted		Add Open Delete		

2. Select an Approval Step from the list box and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Approval Step entry...

Microsoft Internet Explorer 🛛 🔀				
?	You are about to delete selected item(s). Continue?			
	OK Cancel			

3. Click **OK** to delete the Approval Step entry; or click **Cancel** if you do not wish to delete the Approval Step entry.

**NOTE:** You cannot delete an Approval Step entry that is currently being used. If you try to delete such an entry, Office Timesheets will display the following message:

Microsoft Internet Explorer 🛛 🔀				
⚠	You cannot delete this record(s) because it is in use.			
	ОК			

To delete such an entry, you will first have to stop using the Approval Step. (See Viewing or Making Changes to an Approval Step entry for more details.)

## **Managing Reporting Periods**

A Reporting Period is a pre-defined period of time during which the employee prepares a timesheet, recording his/her time and expense details. The employee has to submit the timesheet to his/her manager at the end of the Reporting Period.

Use the Reporting Periods screen to manage your Reporting Periods.

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
S Employee	Task Rules Task Rules Approval Process Holidays Reporting Periods	Define Elements	Custom Fields Fask Rate Fields Customize Task Status Fields	Customize Entry Status Fields Customize Approval Status Fields Zate Tables
Edit	Process		Customize	
Bi-Weekly Monthly Sem-Monthly Weekly		Add Open Delete		
¥-		]	_	_

The following table provides more details about the components of the Reporting Periods screen:

Item	How to use the Item	Default Value (if any)
The Reporting Periods panel	The list box in this panel contains a list of all the reporting periods defined so far (in alphabetical order).	
The Add button	Click the <b>Add</b> button to define a new reporting period.	
The Open button	Select a reporting period in the list box and click the <b>Open</b> button to view or make changes to the definition of the reporting period.	
The Delete button	Select a reporting period in the list box and click the <b>Delete</b> button to delete the reporting period entry.	

#### **Adding a Reporting Period**

To add a Reporting Period:

1. Click on the **Reporting Periods** icon in the Process Management tab.

The Reporting Period screen appears...

View Sheets	Import / Export Reports	Process Management	System Configuration	1	Account Administration
Employee	Task Rules To Approval Process Holidays Reporting Periods	Define Elements	Custom Fields Task Rate Fields Customize Task Status Fields	**** ***	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Edit	Process		Customize		
Bi-Weekly Northly Sem-Monthly Weekly		Add Open Delete			

2. Click the **Add** button.

The Reporting Period dialog box appears...

Save & Ner Save & Close	Definition	esheet Rules	Employee Notifications Area	Manager Notifications
Name				
- Time Zone				
teporting Cycle (Custom tart date 08/22/2007 ength 0		Work da Sunday Monday Tuesday Wednes Thursda Friday Saturda	ys day y	

- 3. In the Name panel, type a unique name for the Reporting Period.
- 4. Select your time zone from the Time Zone drop down list.
- 5. Select a value from the Reporting Cycle drop-down list. The Reporting Cycle indicates how often the employees will have to submit their timesheets for approval. The Reporting Cycle drop-down list contains the following values:
  - Weekly
  - Semi-Monthly (1-15, 16-Last)
  - User-defined Semi-Monthly
  - Monthly (1-Last)
  - Monthly (16-15)

- Bi-weekly
- Custom

Depending upon the value you select from the Reporting Cycle drop-down list, you may also have to provide some more information as described in the following table:

If you select	You will have to also
Weekly	Select the starting day of the week from the <b>Start day</b> drop-down list.
User-defined Semi-Monthly	Specify the <b>Split Day</b> . The Split Day is typically for Semi_Monthly reporting periods where there are two (2) reporting periods in a month. The Split Day is the day which "splits" the month into two periods. For example, the Split Day could either be the 15th or the 16th.
Bi-weekly	Select the <b>Start date</b> using the Date Picker.
Custom	Select the <b>Start date</b> using the Date Picker and also specify the <b>Length</b> (in days) of the Reporting Cycle.

6. In the Work days panel, check the days of the week which are work days.

## Specifying Timesheet Rules for the Reporting Period

7. Click on the **Timesheet Rules** button to specify the Timesheet Rules for this Reporting Period.

The Timesheet Rules panel appears...



8. Check the *Employees assigned to this Reporting Period use approval process?* check box if you want the employees who are assigned to this Reporting Period to follow the approval process and submit Timesheets at the end of each Reporting Period.

- 9. Check the *Only Employee can submit his/her timesheet?* check box if you want to disallow any other user from submitting the employee's timesheet. If this check box is unchecked, any user with rights to the employee's timesheet and the Employee Approval button (in the Timesheet view) can submit the employee's timesheet.
- 10. Check the *Allow timesheets to be submitted before they are due?* check box if you want to allow employees to submit their timesheets before they are due.

OR

Uncheck the *Allow timesheets to be submitted before they are due?* check box if you do not want employees to submit their timesheets before they are due.

- 11. Specify whether the Timesheets become due before or after the end of the Reporting Period. Type the number of days in the text box, and select 'before' or 'after' from the drop-down list.
- 12. Type the number of days in the text box to specify when the Timesheets become overdue.

#### Specifying Employee Notification Settings

13. Click on the **Employee Notifications** button to specify the Employee Notification settings.

The Employee Notifications panel appears...

Save & Ner X Cancel	W Definition	Timesheet Rules	Employee Notifications	Manager Notifications
Actions Name			Area	
- Employee Notifications -				
Notify employee when tim	esheets are due.	Add Subject 1	Token	
mail Subject	] [	Add Odbjeet		
T	Add Moscore	Takan	<u>S</u>	
Token Employee Name	Add Message	Token	<u>×</u>	
Token Employee Name 💌 Notify employee when tim Email Subject	Add Message	Token ue. Add Subject 1	V	
Token Employee Name 💌 Notify employee when tim Email Subject	Add Message	Token ue. Add Subject 1	Foken	
Token Employee Name 💌 Notify employee when tim Email Subject	Add Message	Token ue. Add Subject 1	Token	
Token Employee Name 💌 Notify employee when tim Email Subject	Add Message	Token ue. Add Subject 1	ľoken	
Token Employee Name 💌 Notify employee when tim Email Subject	Add Message	Token ue. Add Subject 1	Token	
Token Employee Name  Token Employee When tim Email Subject Token Employee View 1000	Add Message	Token ue. Add Subject 1	Token	

Use the contents of this panel to specify whether a notification has to be sent to the employee and to type the contents of the notification. The Employee Notifications panel is divided into two halves:

- In the upper half of the Employee Notifications panel, specify the details of the notification to be sent when the timesheets are due.
- In the lower half of the Employee Notifications panel, specify the details of the notification to be sent when the timesheets are overdue.

The following table describes the various items in the Employee Notifications panel:

Item	How to use the Item	Default Value (if any)
Notify Employee when timesheets are due	Check the <b>Notify Employee when timesheets are</b> <b>due</b> check box if you want a notification to be sent to the employee when timesheets are due from the employee.	
Token	While preparing the notification message, select a token from the Token drop-down list to insert it into the subject or body of the message. The Token drop- down list contains the following tokens:TokenAppears on the screen asWhat happens to it when the message is sentEmployee[Employee Name]Will get replaced with the employee's name.Manager Name[Manager Name]Will get replaced with the manager's name.Start Date[Start Date]Will get replaced with the ending date of the Reporting Period.NOTE:Token is a special code that you can insert into the subject and body of the message. Tokens are similar to Merge Fields or Merge Codes used in your Word Processing software's Mail Merge Feature. When Office 	
Email Subject	Type the subject of the notification message.	
The Add Subject Token button	Select a token from the <b>Token</b> drop-down list and click the <b>Add Subject Token</b> button, to add the selected token to the <b>Email Subject</b> at the current cursor location.	
The Email body text box	Type the text of the notification message.	

Item	How to use the Item	Default Value (if any)
The Add Message Token button	While typing the body matter of the notification message, select a token from the <b>Token</b> drop-down list and click the <b>Add Message Token</b> button, to add the selected token to the body of the message at the current cursor location.	
Notify Employee when timesheets are overdue	Check the <b>Notify Employee when timesheets are</b> <b>overdue</b> check box if you want a notification to be sent to the employee when timesheets are overdue from the employee.	

#### Specifying Manager Notification Settings

14. Click on the **Manager Notifications** button to specify the Manager Notification settings.

The Group Manager Notifications panel appears...

Save & Close	Definition Timesheet	Rules Employee Notifications	Manager Notifications
Actions Name		Area	
Group Manager Notification Group Manager when timest Email Subject Token Employee Name	s neets are due. Add Su Add Message Token neets are overdue. Add Su	ibject Token	

Use the contents of this panel to specify whether a notification has to be sent to the employee and to type the contents of the notification. The Group Manager Notifications panel is divided into two halves:

- In the upper half of the Group Manager Notifications panel, specify the details of the notification to be sent when the timesheets are due.
- In the lower half of the Group Manager Notifications panel, specify the details of the notification to be sent when the timesheets are overdue.

The following table describes the various items in the Group Manager Notifications panel:

Item	How to use the Item	Default Value (if any)
Notify manager when timesheets are due	Check the <b>Notify manager when timesheets are</b> <b>due</b> check box if you want a notification to be sent to the manager when timesheets are due from the employee.	
Token	While preparing the notification message, select a token from the Token drop-down list to insert it into the subject or body of the message. The Token drop- down list contains the following tokens—TokenAppears on the screen asWhat happens to it when the message is sentEmployee[Employee Name]Will get replaced with the employee's name.Manager Name[Manager Name]Will get replaced with the manager's name.Start Date[Start Date]Will get replaced with the ending date of the Reporting Period.NOTE:Token is a special code that you can insert into the subject and body of the message. Tokens are similar to Merge Fields or Merge Codes used in your Word Processing software's Mail Merge feature. When Office 	
Email Subject	Type the subject of the notification message.	
The Add Subject Token button	Select a token from the <b>Token</b> drop-down list and click the <b>Add Subject Token</b> button, to add the selected token to the <b>Email Subject</b> at the current cursor location.	
The Email body text box	Type the text of the notification message.	

Item	How to use the Item	Default Value (if any)
The Add Message Token button	While typing the body matter of the notification message, select a token from the <b>Token</b> drop-down list and click the <b>Add Message Token</b> button, to add the selected token to the body of the message at the current cursor location.	
Notify manager when timesheets are overdue	Check the <b>Notify manager when timesheets are</b> <b>overdue</b> check box if you want a notification to be sent to the manager when timesheets are overdue from the employee.	

#### Saving the Reporting Period Entry

15. Once you have made all the selections (as described in the previous topics), do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save this Reporting Period entry and start creating a new Reporting Period entry.
Click the Save & Close button	Save this Reporting Period entry and return to the <b>Reporting Periods</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Reporting Period</b> dialog box	Return to the <b>Reporting Periods</b> screen without saving the new Reporting Period entry.

#### Viewing or Making Changes to a Reporting Period Entry

To view or make changes to a Reporting Period entry:

1. Click on the **Reporting Periods** icon in the Process Management tab.

The Reporting Period screen appears...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee Element Items Expense Edit	Holidays	Define Elements	Custom Fields Fask Rate Fields Customize Task Status Fields Customize	1999 Customize Entry Status Fields 1999 Customize Approval Status Fields 1998 Rate Tables
Reporting Periods				
Bi-Weekly Monthy Semi-Monthy Weekly		Add Open Delete		

- 2. Select a Reporting Period from the list box and click the **Open** button.
- 3. Make changes to the Reporting Period. (See Adding a Reporting Period for more information.)
- 4. Finally, do one of the following...

Do this	То
Click the Save & New button	Save the changes you have made to the Reporting Period entry and start creating a new Reporting Periods entry.
Click the Save & Close button	Save the changes you have made to the Reporting Period entry and return to the <b>Reporting Periods</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Reporting Period</b> dialog box	Return to the <b>Reporting Periods</b> screen without saving the changes you have made to the Reporting Period entry.

#### **Deleting a Reporting Period Entry**

To Delete a Reporting Period entry:

1. Click on the **Reporting Periods** icon in the Process Management tab.

The Reporting Period screen appears...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee Element items Expense	Task Rules Task Rules Approval Process Holidays Reporting Periods	Define Elements	Custom Fields Task Rate Fields Customize Task Status Fields	Customize Entry Status Fields     Customize Approval Status Fields     Rate Tables
Reporting Periods	Process		Customize	
Bi-Weekly Monthly Semi-Monthly Weekly		Add Open Delete		

2. Select a Reporting Period from the list box and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Reporting Period entry.



3. Click **OK** to delete the Reporting Period entry; or click **Cancel** if you do not wish to delete the Reporting Period entry.

**NOTE:** You cannot delete a Reporting Period entry that is currently being used. If you try to delete such an entry, Office Timesheets will display the following message:

Microso	Microsoft Internet Explorer		
⚠	You cannot delete this record(s) because it is in use.		
	ОК		
	OK		

To delete such an entry, you will first have to stop using the Reporting Period. (See Viewing or Making Changes to a Reporting Period entry for more details.)

# **Employees and Employee Groups**

You have to create an Employee entry for each person whose hours you wish to track. Every task created in Office Timesheets requires an employee to be associated with it. Employees may also be grouped using Office Timesheets' Employee Groups function. Employee Groups allow you to manage employees more efficiently.

**NOTE:** There is a difference between Users and Employees.

A user is an employee who has been assigned a User Account. You must assign a User Account to each employee that will access the Office Timesheets application. The total number of user accounts allowed by Office Timesheets License Activation Manager will depend on how many User Account licenses have been purchased from Lookout Software. For example, if an organization purchases 50 licenses from Lookout Software, the organizations will get a license code for Office Timesheets that will allow 50 User Account assignments.

However, you do not need to assign a User Account to all of your employees. There is no need to assign a User Account to an employee who will not be using Office Timesheets. Office Timesheets allows you to enter data for employees that do not have a User Account. However, these details will have to be entered by a licensed user of Office Timesheets.

Thus, all users are employees but all employees need not be users.

**WARNING:** While Office Timesheets allows you to enter data for employees that do not have a User Account, it is a strict violation of the Office Timesheets Software License Agreement to share User Accounts. For example, if several employees all access Office Timesheets using the same login or User Account name, it is a

violation of the Office Timesheets Software License Agreement. Office Timesheets includes validation that does not allow more than one simultaneous login of a User Account.

Use the Manage Employee screen to manage your Employee and Employee Group entries.

Encloyee   Dement Rens.   Expanse   Ext   Demet Rens.   Delete   Paleter   Delete   Point Rens.   Ext   Delete   Point Rens.   Ext   Delete   Point Rens.   Ext   Delete   Point Rens.   Delete   Point Rens.   Delete   Point Rens.   Ext   Delete   Delete <	View Sheets Import / Export Reports	Process Manager	ment System Configuration Account Administration
Manage Employee         Employee Groups         (An)         AccountingFinance         Business Development         Documentation         Engineering Development (AUS)         Engineering Development (IV)         Implementation Services         Interfering Development (IV)         Engineering Development (IV)         Implementation Services         Information Technology         Product Marking and Management         Public Relations         Qualty Assurance         Testing by Sunt Suresh         Z Group	Employee         Imployee           Element Items         Imployee           Expense         Imployee           Edt         Process	Define Elements	Custom Fields Customize Entry Status Fields
Employee Groups       Add         [An]       Add         Open       Open         Documentation       Delete         Engineering Development (AUS)       Delete         Engineering Development (UK)       Implementation Services         Implementation Services       Implementation Services         Voidut Arssurance       Testing by Sunil Suresh         Z Group       Filter View	Manage Employee		
Add     Add       Open     Add       Documentation     Open       Documentation     Delete       Engineering Development (AUS)     Delete       Engineering Development (UK)     Implementation Services       Implementation Services     Iteration Services       Voidut Marksurance     Delete   Filter View AI	Employee Groups		- Employee
	(Ab)       Accounting/Finance       Documentation       Engineering Development (AUS)       Engineering Development (CN)       Engineering Development (CN)       Engineering Development (CN)       Product Marketing and Management       Public Relations       Quality Assurance       Testing by Sunil Suresh       Z Group	Add Open P Delete T	Anderson A. Leyd Add Canon C Cedrik Dirk K. Lauren Palmeri N. Christopher Stevens S Mark Thompson M. Erica

The following table provides more details about the components of the Manage Employee screen:

Item	How to use the Item	Default Value (if any)
Employee panel	This panel displays the list of Employee entries that have been made till now. It also has buttons to add, view/edit and delete Employee entries.	
The Add button	Click the <b>Add</b> button to add a new Employee entry.	
The Open button	Select an Employee entry in the list box and click the <b>Open</b> button to view or make changes to the Employee entry.	
The Delete button	Select an Employee entry in the list box and click the <b>Delete</b> button to delete the Employee entry.	
Filter View	Select whether to view only active entries, inactive entries or all entries. <b>TIP:</b> When employees go on leave, you can mark their status as "Inactive". Then, you can reduce the number of entries displayed in the list box by selecting "Active Only" in the <b>Filter View</b> drop-	All

Item	How to use the Item	Default Value (if any)
	down list. When you do this, <b>Office Timesheets</b> will display the names of only those employees whose status is "Active". When employees return from their vacation, you can set their status back to "Active".	
Employee Groups panel	This panel displays the list of Employee Groups that have been defined till now. It also has buttons to add, view/edit and delete Employee Groups.	
The Add button	Click the <b>Add</b> button to add a new Employee Group.	
The Open button	Select an Employee Group entry in the list box and click the <b>Open</b> button to view or make changes to the Employee Group entry.	
The Delete button	Select an Employee Group entry in the list box and click the <b>Delete</b> button to delete the Employee Group entry.	

#### Adding an Employee Entry

Note: Only systems administrators can add Employee entries.

To add an Employee entry:

1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen will appear...

View Sheets Import / Export Reports	Process Management System Configuration Account Administration
Employee         Image: Complex comple	Custom Fields Customize Entry Status Fields Task Rate Fields Define Elements Customize Task Status Fields Customize Approval Status Fields Customize Approval Status Fields Customize Rate Tables Customize
Manage Employee	
Employee Groups	Employee
(Ai) AccountingFinance Business Development Documentation Engineering Development (AIS) Engineering Development (CN) Engineering Development (CN) implementation Services in formation Technology Product Marketing and Management Public Relations Qualty Assurance Teating by Sum Suresh Z Group	Add     Anderson A. Löyd     Add       Open     Canon C. Cedrik     Open       Patieri N. Loritopher     Stevens S Mark     Delete       Delete     Thompson M. Erica     Delete
	Filter View All

2. Click the **Add** button in the Employee panel.

The Employee dialog box will appear...

Save & Ner Cancel Save & Close	W Definition	Rates	Groups	Dependencies	Custom Fields	Electronic Signature
Actions				Show		
First Name	Brian					
M.I.	A					
Last Name	Anderson					
Display Name	Anderson A Bria	in				
E-Mail	brian_a_anderso	brian_a_anderson@quorumeng.com				
Status	Active	Active				
Reporting Period	Weekly	Weekly 👻				
Holiday Group	United States				•	
Manager	{No selection}				-	
Lock Dates						
Time Entry						
Expense Entry						
Do not allow Time and/or Expe	nse Entries prior t	o these	dates			
Approval Start Date				06/21/2011		
Do not show Time and/or Exne	nse Sheets prior i	to this da	ate			

In the Definition panel, type the name and e-mail address of the employee. Also, select the status, reporting period, holiday group and lock dates for time and expense entries.

The following table describes the various items in the Definition panel:

Item	How to use the Item	Default Value (if any)
First Name	In the <b>First Name</b> field, type the first name of the employee. Eg: Paul	
M.I.	In the M.I. field, type the middle initials of the employee. Eg: J.          Note: You can enter a maximum of five (5) characters in the M.I. field.	
Last Name	In the <b>Last Name</b> field, type the last name of the employee. Eg: Ford	
Display Name	The <b>Display Name</b> field shows how the name of the employee will appear within the various screens and reports of Office Timesheets.	Displays whatever you have typed in the

Item	How to use the Item	Default Value (if any)
	<b>Note:</b> By default, the <b>Display Name</b> field will automatically display the last name, middle initial and first name that you have typed in the <b>Last Name</b> , <b>M.I.</b> and <b>First Name</b> fields, respectively. (Eg: Ford J. Paul.) However, you can change this value to anything else that you want. (Eg: If you have two employees, one named "Paul Jackson Ford" and the other named "Paul Johnson Ford", by default both would have a Display Name of "Ford J. Paul". Therefore, to avoid confusion, you could change the <b>Display Name</b> of the second entry to "Ford Johnson Paul".)	Last Name, M.I. and First Name fields, respectively.
E-Mail	In the <b>E-Mail</b> field, type the e-mail address of the employee.	
Status	From the <b>Status</b> drop-down list, select whether the employee entry is "active" or "inactive". <b>TIP:</b> When employees go on leave, you can mark their status as "Inactive". When employees return from their vacation, you can set their status back to "Active".	Active
Reporting Period	From the <b>Reporting Period</b> drop-down list, select the Reporting Period for the employee. Employees have to submit their Timesheets at the end of each Reporting Period. <b>NOTE:</b> The <b>Reporting Period</b> drop-down list contains the Reporting Periods that you have defined in the Reporting Periods screen. <b>TIP:</b> Select "{No selection}" if you do not want to assign any Reporting Period for the employee.	{No selection}
Holiday Group	From the <b>Holiday Group</b> drop-down list, select the Holiday Group you want to assign to the employee. Holiday Groups are useful for organizations that have offices in different parts of the world. You could create a different Holiday Group for each office that is in a different country, listing the holidays of that country. You can then quickly assign the list of holidays to employees from an office in a particular country, by assigning the Holiday Group to each those employees. (See <b>Holidays and Holiday Groups</b> for	{No selection}

Item	How to use the Item	Default Value (if any)
	<ul> <li>more information.)</li> <li>NOTE: The Holiday Group drop-down list contains the names of the Holiday Groups that you have defined using the Holiday screen.</li> <li>TIP: Select "{No selection}" if you do not want to assign any Holiday Group to the employee.</li> </ul>	
Lock Dates	In the <b>Lock Dates</b> panel specify starting time entry and expense entry dates. Office Timesheets will not allow the employee to make any entries that are prior to the dates that you specify here.	
Time Entry	In the <b>Time Entry</b> field, using the Date Picker, select the starting date for time entries. <b>NOTE:</b> Office Timesheets will not allow the employee to make any time entries that are prior to the date that you specify here.	1/1/1900
Expense Entry	In the <b>Expense Entry</b> field, using the Date Picker, select the starting date for expense entries. <b>NOTE:</b> Office Timesheets will not allow the employee to make any expense entries that are prior to the date that you specify here.	1/1/1900
Approval Start Date	Sets the date in which the approval process will start for the specified employee.	

Setting the Pay Rates for the Employee

3. Click on the **Rates** button to display the Rates panel.

ave & Close	Save & New Cancel	2 Definition	Rates	Groups	Dependenc	cies Custom Fields
Actions				Shov	N	
Pay Rate	Overhead Co	st	Billing	Shift Dif	ferentia	Shift Differentia
Effective date	Standard	l rate	Overtim	e rate		
	0.00		0.00		Clear	]
	0.00		0.00		Clear	)
	0.00		0.00		Clear	
::=	0.00		0.00		Clear	
	0.00		0.00		Clear	
	0.00		0.00		Clear	]
	0.00		0.00		Clear	
	0.00		0.00		Clear	)
	0.00		0.00		Clear	]
	0.00		0.00		Clear	j l

Use the Rates panel to enter the standard and overtime pay rates for the employee.

There are five (5) tabs in the Rates panel.

**NOTE:** The titles of the tabs are defined in the Define Rate Tables screen.

In each tab, you can specify the Standard pay rate and the Overtime pay rate for the employee.

**NOTE:** Office Timesheets allows you to maintain upto 10 sets of rates in each tab. When you first make the employee entry, fill in the rates in the first row. Use the remaining rows to enter the employee's pay rates in future, when the employee's pay rate changes.

The following example shows what you would need to do to keep track of an employee's pay rate changes:

On	Make the following entry
On 1-Jan-2007, an employee joins is paid at a standard rate of \$4.	When you create the Employee entry, you would type 4.00 in the <b>Standard rate</b> column of the first row.
On 1-Jul-2007, the employee is given an increment and his pay rate rises to \$6.	Edit the Employee's entry. In the Rates panel in the first column of the second row, select 1-Jul-07 using the Date Picker Type 6.00 in the Standard rate column of the second row. Save the changes. From this point onwards, the employee's pay is calculated @ \$6 if the date of the entry is 1-Jul-07 or later, and @ \$4 if the date is prior to 1-Jul-07.

On 1-Jan-2009 the employee is again given a further increment and his pay rate becomes \$8.	Edit the Employee's entry. In the Rates panel in the first column of the third row, select 1-Jan-09 using the Date Picker. Type 8.00 in the Standard rate column of the third row. Save the changes. From this point onwards, the employee's pay is calculated @ \$8 if the date of the entry is 1-Jan-09 or later; @ \$6 if the date of the entry is between 1-Jul-07 and 1-Jan-09, and @ \$4 if the date is prior to 1-Jul-07.

TIP: Click on the Clear button in any row, to clear or delete the values in that row.

#### Assigning the Employee to One or More Groups



4. Click on the Groups button to display the Groups panel.

Use the Groups panel to assign the employee to one or more groups.

The following table describes the various items in the Groups panel:

Item	How to use the Item	Default Value (if any)
Is not a member of	The <b>Is not a member of</b> panel displays the Employee Groups (if any) that have not been assigned to the employee.	
Is a member of	The <b>Is a member of</b> panel displays the Employee	

Item	How to use the Item	Default Value (if any)
	Groups (if any) that have been assigned to the employee.           NOTE: If you are creating a new entry, the Is a member of panel will be empty until you assign the employee to a group.	
The New Group button	Click the <b>New Group</b> button to create a new employee group and make the employee a member of that group. (See <b>Creating Employee Groups</b> for more details about creating a new Employee Group.)	
The Add button	Select one or more group names from the <b>Is not a</b> <b>member of</b> panel and click the <b>Add</b> button to add the Employee to those groups. When you click the <b>Add</b> button, the group names that you have selected will shift to the <b>Is a member of</b> panel, indicating that the employee is now a member of those groups.	
The Remove button	Select one or more group names from the <b>Is a</b> <b>member of</b> panel and click the <b>Remove</b> button to remove the Employee from those groups. When you click the <b>Remove</b> button, the group names that you have selected will shift to the <b>Is not a</b> <b>member of</b> panel, indicating that the employee is no longer a member of those groups.	

# Specifying Dependent Element Items and Groups

5. Click on the **Dependencies** button to display the Dependencies panel.

		Dependencies	Custom Fields
	She	ow	
<b></b>			
Dependencies -			
	_		

Use the Dependencies panel to define the dependent element items and groups that can be used by the employee in the task entries.

**NOTE:** You have to specify the dependent element items and groups only if you have previously defined certain elements to be dependent upon the Employee item in the Task Rules screen. (See Defining Task Rules and Dependencies for more information on specifying Task Rules and setting the order of the entries.)

The following table describes the various items in the Dependencies panel:

**NOTE:** These items will appear in the Dependencies panel only if you have previously defined certain elements to be dependent upon the Employee item in the Task Rules screen. (See Defining Task Rules and Dependencies for more information.)

Item	How to use the Item	Default Value (if any)
Dependent Element	All the elements that you have defined as dependent upon the Employee item in the <b>Task Rules</b> screen will appear in the <b>Dependent Element</b> drop-down list. Select each item in turn and use the <b>Add</b> button to add the Dependent Element Items and Groups that can be used by the employee in the task entries.	
Element Item and Group Dependencies	The <b>Element Item and Group Dependencies</b> panel displays all the dependent element items and groups that you have set up for the employee. Use the <b>Add</b> and <b>Delete</b> buttons to add entries to, or delete entries from, this panel.	

Item	How to use the Item	Default Value (if any)
The Add button	Click the Add button to add dependent element items and groups. Select the items and groups from the Select element box that appears and click OK.          Image: Select the items and groups from the Select element box that appears and click OK.         Image: Select the items is the select element items and group to the Element Item and Group drop-down list. The names of the items that belong to the select ed group will appear in the Names panel.         Image: Select the entire group, click on {Group} in the Names panel.         Image: Click OK.         Image: Select the entire group will be added to the Element Item and Group appear.	
The Delete button	To remove an item from the <b>Element Item and</b> <b>Group Dependencies</b> panel, select the item and click the <b>Delete</b> button. Office Timesheets will ask whether you really want to delete the entry.	

Item	How to use the Item	Default Value (if any)
	Microsoft Internet Explorer       Image: Continue         You are about to delete selected item(s). Continue?       Image: Continue         OK       Cancel         OK       Cancel         Click OK to delete the selected entry.	
Elements in Group	<text><image/><text></text></text>	

**Note:** These items will appear in the Dependencies panel only if you have previously defined certain elements to be dependent upon the Employee item in the Task Rules screen. (See Defining Task Rules and Dependencies for more information.)

#### Entering Other Details about the Employee

6. Click on the **Custom Fields** button to display the Custom Fields panel.

Employee		x
Save & New X Cancel	Definition Rates Groups	Dependencies Custom Fields
Actions	SI	how
Custom Fields Employee Type Work Extension Start Date	{No selection}	
Employment Status Home Phone Mobile Phone	{No selection}	
Emergency Contact Emergency Contact Phone 1 Emergency Contact Phone 2		
Birthday		

Use the Custom Fields panel to enter other details about the Employee such as the birthdate of the Employee, contact numbers, starting date etc.

**NOTE:** The fields that you see in the Custom Fields panel are the same fields that you set up in the Custom Field Definitions for Employee screen. (See Defining Custom Fields for the Task Elements for more information on setting up custom fields for Employee entries.)

### Saving the Employee Entry

7. Once you have made all the selections and specified all the details (as described in the previous topics); do one of the following:

Do this	То
Click the Save & New button	Save this Employee entry and start creating a new Employee entry.
Click the Save & Close button	Save this Employee entry and return to the <b>Manage Employee</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Employee</b> dialog box	Return to the <b>Manage Employee</b> screen without saving the new Employee entry.

#### Viewing or Making Changes to an Employee Entry

NOTE: Only systems administrators can make changes to Employee entries.

To view or make changes to an Employee entry:

1. Click on the **Employee icon** in the Process Management tab.

The Manage Employee screen appears...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Administration
Employee Element items Expense Edit	Holidays Task Rules Process Process	Define Elements	ustom Fields fie	Customize Entry Status Fields Customize Approval Status Fields Rate Tables
Manage Employee				
Employee Group	S	Em	ployee	
(AI) Accounting/Finance Business Development Documentation Engineering Developm Engineering Developm Implementation Service Information Service Information Technolog Product Marketing and Public Relations Quality Assurance Testing by Suni Sures Z Group	t ent (AUS) ent (CN) ent (UK) s Management h	Ad Anders Open Canon Canon Canon Canon Steven Thomps	on A. Löyd Codrik Lauren I. S. Mark ion M. Erica	Add Open Delete
		Filter Vi	ew Al	×
_				

- 2. Select an Employee entry from the Employee panel and click the **Open** button.
- 3. Make changes to the Employee entry.
- 4. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes you have made to the Employee entry and start creating a new Employee entry.
Click the Save & Close button	Save the changes you have made to the Employee entry and return to the <b>Manage Employee</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Employee</b> dialog box	Return to the <b>Manage Employee</b> screen without saving the changes you have made to the Employee entry.

#### Inactivate an Employee from Office Timesheets

To mark an employee "Inactive" you must first remove them from the User Accounts list. You can then open the Employee record for the specified employee and mark them "Inactive". Here's the procedure:

- 1. Log into Office Timesheets and click on the System Configuration tab.
- 2. Click on the User Accounts icon in the User Accounts ribbon group.

- 3. Select the specified employee you wish to remove from the User Accounts list and click the **Delete** button. (Note: You are not deleting the employee record here. You are only removing the employee's ability to log into Office Timesheets...a.k.a. their "User Account". This also frees up the license so that it can be used by the former employee's replacement).
- 4. Next, click on the **Process Management**.
- 5. Click on the **Employee** icon in the Edit ribbon group.
- 6. Double-click on the employee's name in the Employee list.
- 7. From the Employee dialog set the Employee's status to "Inactive"; and click Save & Close.

#### **Deleting an Employee Entry**

To Delete an Employee entry:

1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen appears...

View Sheet:	s Import / Exp	ort Reports	Process Manag	ement	System Configuration	n Account	Administration
Employee Element items Expense Edit	Holidays	Task Rules Approval Process Reporting Periods cess	Define Elements		ustom Fields ask Rate Fields ustomize Task Status Fields Customize	Customize	e Entry Status Fields e Approval Status Fields es
Manage Employee							
Employee Group	s			- Emp	loyee		
(Ad) Accounting/Finance Business Developme Documentation Engineering Developm Engineering Developm Imglementation Service Internation Technolog Product Marieting and Outable Assurance Testing by Sunt Sures Z Group	t ent (AUS) ent (CN) ent (UK) 55 Y Management th		Add Open Delete	Anderso Canon C Clark K. Palmeri I Stevens Thompso	n A. Löyd Cédrik Leuren S. Mark S. Mark n M. Erica		Add Open Delete
				Filter Vie	AI	~	

2. Select an Employee entry from the Employee panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Employee entry.

Microso	ft Internet Explorer 🛛 🔀
?	You are about to delete selected item(s). Continue?
	OK Cancel

3. Click **OK** to delete the Employee entry or click **Cancel** if you do not wish to delete the Employee entry.

#### **Creating an Employee Group Entry**

If there are many employees in your organization, you can create groups and assign employees to these groups for easy management of the employees' data and entries. For example, you could create groups for—

- Employees working on a common project.
- Employees working in a common department, say a group for all employees of the Animation department.
- Employees from a particular branch, say a group for all employees of your office in another country.

To create an Employee Group entry:

1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen will appear...

View Sheets	s Import / Exp	ort Reports	Process Manag	ement	System Configuration	Accoun	t Administration
Element items Element items Expense Edit	Holidays	Task Rules Approval Process Reporting Periods ocess	Define Elements	20 C	ustom Fields ask Rate Fields ustomize Task Status Fields Customize	Customi	ze Entry Status Fields ze Approval Status Fields bles
Manage Employee							
Employee Group	s			- Emp	loyee		
(A) AccountryFinance Business Developmen Documentation Engineering Developme Engineering Developm Engineering Developm Inglementation Service Information Technolog Public Relations Outlier Assurance Testing by Suni Sures Z Group	t ent (AUS) ent (CN) ent (UK) se y Management ih		Add Open Delete	Anderso Canon C Clark K. Palmeri I Stevens Thompso	n A. Loyd Codrik Lauren S. Mark S. Mark n M. Erica		Add Open Delete
				Filter Vie	IA W		•
			L				

2. Click the **Add** button in the Employee Groups panel.

The Employee Group dialog box will appear...

Employee Group Save & Close Actions	×
Group Name	
Notin group Anderson A. Löyd Anderson A. Löyd Anderson L. Thomas Aston C. Tran Brown H. Alan Cann C. Cedrik Clark K. Lauren Cooper C. James Cooper J. James Cooper H. Dan Coota E. Mathew Fabiano H. Ryan	Add Remove
Group Manager	

The following table describes the various items in the Employee Group dialog box:

Item	How to use the Item	Default Value (if any)
Group Name	Type a unique name for the group.	
Not in group	The <b>Not in group</b> panel displays the names of employees who have not been assigned to the group.	
In group	The <b>In group</b> panel displays the names of employees who have already been assigned to the group.	
in group	<b>NOTE:</b> If you are creating a new entry, the <b>In</b> <b>group</b> panel will be empty until you add members to the group.	
	Select one or more employee names from the <b>Not in</b> <b>group</b> panel and click the <b>Add</b> button to add the employees to the group.	
The Add button	When you click the <b>Add</b> button, the employee names that you have selected will shift to the <b>In group</b> panel, indicating that the employees are now members of the group.	
	Select one or more employee names from the <b>In</b> <b>group</b> panel and click the <b>Remove</b> button to remove the employees from the group.	
The Remove button	When you click the <b>Remove</b> button, the employee names that you have selected will shift to the <b>Not in</b> <b>group</b> panel, indicating that the employees are no longer members of the group.	
	If you want to assign a manager for the group, click	
	select an employee as a manager.	
Group Manager	<b>NOTE:</b> Office Timesheets uses the group manager during the approval process. When you make an employee a group manager, the employee is responsible for reviewing and approving the timesheets for each member of the group.	
	<b>TIP:</b> The person you select as the group manager need not be a part of the group. This allows you to assign a group manager without changing existing employee groups that you	

Item	How to use the Item	Default Value (if any)
	may have set up for other features such as task rules.	

3. Once you have made all the selections and specified the other details, do one of the following:

Do this	То
Click the Save & New button	Save this Employee Group entry and start creating a new Employee Group entry.
Click the Save & Close button	Save this Employee Group entry and return to the <b>Manage Employee</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Employee Group</b> dialog box	Return to the <b>Manage Employee</b> screen without saving the new Employee Group entry.

**TIP:** Once you have created Employee Groups and assigned employees to groups, you can quickly locate an employee's entry, if you know which group he/she belongs to. When you click on the group name in the Employee Groups panel, the names of only those employees who belong to that group will be displayed in the Employee panel. You can thus quickly locate the desired employee entry.

**TIP:** If you click on {All} in the Employee Groups panel, Office Timesheets will display the names of all the employees.

Viewing or Making Changes to an Employee Group Entry

To view or make changes to an Employee Group entry:

1. Click on the Employee icon in the Process Management tab.

The Manage Employee screen appears...

View Sheet	s Import / Export	Reports	Process Manag	ement	System Configuration	Acc	ount Admini	stration
Employee Element items Expense Edit	Holidays Tas	sk Rules proval Process porting Periods s	Define Elements	с 20, т 12, с	ustom Fields ask Rate Fields ustomize Task Status Fields Customize	Cus Cus Rate	tomize Entry : tomize Appro • Tables	Status Fields val Status Fields
Manage Employee								
Employee Group	s			- Emp	loyee			
(AI) Accounting/Finance Business Developmen Documentation Engineering Developm Engineering Developm Engineering Developm Implementation Servic Information Technolog Product Marketing and Public Relations Quality Assurance Testing by Sunil Suret Z Group	t ent (AUS) ent (CN) ent (UK) es y Management ah		Add Open Delete	Anderso Canon C Clark K. Palmeri Stevens Thomps	on A. Löyd Codrik Lauren N. Christopher I S. Mark on M. Erica			Add Open Delete
				Filter Vie	AI N		~	
_	_	_	-					

- 2. Select an Employee Group entry from the Employee Groups panel and click the **Open** button.
- 3. Make changes to the Employee Group entry.
- 4. Finally, do one of the following...

Do this	То
Click the Save & New button	Save the changes you have made to the Employee Group entry and start creating a new Employee Group entry.
Click the Save & Close button	Save the changes you have made to the Employee Group entry and return to the <b>Manage Employee</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Employee Group</b> dialog box	Return to the <b>Manage Employee</b> screen without saving the changes you have made to the Employee Group entry.

#### **Deleting an Employee Group Entry**

To Delete an Employee Group entry:

1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen appears...

Image: Services     Image: Services <td< th=""><th>View Sheets</th><th>Import / Export</th><th>Reports Process Ma</th><th>nagement System Confi</th><th>guration Account Admin</th><th>istration</th></td<>	View Sheets	Import / Export	Reports Process Ma	nagement System Confi	guration Account Admin	istration
Marage Employee       Employee Groups       Can boyse Groups       Accounting Finance       Business Development       Documentation       Employee Groups       Engineering Development (K)       Engineering Development (K)       Information Enclosely       Product Marketing and Maragement Andle Readom       Auble Readom       Testing by Suit Sureah       Z Group   Filter View At	Element tems Element tems Ett	Holidays Task F Repor Process	tules val Process ting Periods Define Elemen	Custom Fields	s Fields Entry tomize Entry tomize	Status Fields val Status Fields
Employee Groups     Add       (A)     (A)	Manage Employee					
[A9]     Add       Open     Open       Basiness Development     Open       Engineeming Development (AIIS)     Delete       Engineeming Development (IN)     Engineeming Development (IN)       Engineeming Development (IN)     Engineeming Development (IN)       Delete     Delete       Abdre Relations     Delete	Employee Groups			Employee		
Filter View As	FAR) AccountingFinance Business Development Engineering Development Engineering Development Engineering Development Engineering Development Engineering Development Ingementation Services Information Technology Moudit Markens and M Public Relations Outsty Assurance Testing by Suid Suresh 2 Giroup	it ( (AUS) ( (CR) tanagament	Add Open Delete	Addresen A. Libyd Canon C. Codrk Clark K. Lauren Patneri K. Christopher Stevens S. Mark Thompson M. Erica		Add Open Delete
	<u>e</u>			Filter View AI	~	

2. Select an Employee Group from the Employee Groups panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Employee Group entry.



3. Click **OK** to delete the Employee Group entry or click **Cancel** if you do not wish to delete the Employee Group entry.

**NOTE:** You cannot delete a group that has some employees assigned to it. If you try to delete such a group, Office Timesheets will display the following message:



To delete such a group, you will first have to remove the employees from the group.

## **Element Items and Element Item Groups**

Task elements create the primary structure of tasks within Office Timesheets. Office Timesheets allows you to define up to ten element items.

Once your task element levels have been defined, you can create element items at each element level, which will then allow you to create task entries.

You can also create element item groups to help manage the element item entries.

Use the Manage {Element} screen to add/edit/delete {Element} entries and {Element} Group entries.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

View Sheets	Import / Export	Reports	Process Manage	ement	System Configuration	Account Ac	dministration
Employee Element Items Expense Edit	Holidays	Rules roval Process orting Periods	Define Elements	С с С С С	ustom Fields ask Rate Fields ustomize Task Status Fields Customize	Customize E	Entry Status Fields Approval Status Fields
Manage Client							
- Client Groups			(	Client -			
(AB) Paying Clients Pro-Bono Prospective Clients Work Exchange			Add Ada Open Athen Blace	sison Labbar torm Tech.ol.ink Eng ckRock M More cal Massa tomApp Enterprint Eng cal Massa tomApp Eng character and the Cal prover, stone Eng con Inte morez, In Interprint May Cal Manage Manag	s, Inc. nology, Inc. anufacturing Partners, Inc. argy Systems, Inc. argy Systems, Inc. argy Systems, Inc. argy Systems, Inc. Technologies, Inc. Technologies, Inc. Incorporated ises Corporation Incorporated C. Corporated Corporated Corporated Corporated Corporated Corporated Systems, Inc. Systems, Inc. Systems, Inc.		Add Open Delete
			Filte	r View	AI	~	
_	_	-					

**NOTE:** Since these are all user-defined elements, each organization may have its own items. However, whatever you may call the items, the screens will be somewhat similar. As an example, we have provided figures from the Manage Client screen. Though the screens may be slightly different for you (depending upon the custom fields defined), the steps to be followed will be the same for any item under the Element Items... button.

The following table provides more details about the components of the Manage {Element} screen:

Item	How to use the Item	Default Value (if any)
{Element} panel	The <b>{Element}</b> panel is displayed on the right-half of the <b>Manage {Element}</b> screen. This panel displays the list of {Element} entries that have been made till now. It also has buttons to add, view/edit and delete {Element} entries.	
The Add button	Click the <b>Add</b> button to add a new {Element} entry.	
The Open button	Select an {Element} entry in the list box and click the <b>Open</b> button to view or make changes to the {Element} entry.	
The Delete button	Select an {Element} entry in the list box and click the <b>Delete</b> button to delete the {Element} entry.	

Item	How to use the Item	Default Value (if any)
Filter View	Select whether to view only active entries, inactive entries or all entries.	All
{Element} Groups panel	The <b>{Element} Groups</b> panel is displayed on the left-half of the <b>Manage {Element}</b> screen. This panel displays the list of <b>{Element} Groups</b> that have been defined till now. It also has buttons to add, view/edit and delete {Element} Groups.	
The Add button	Click the <b>Add</b> button to add a new {Element} Group.	
The Open button	Select an {Element} Group entry in the list box and click the <b>Open</b> button to view or make changes to the {Element} Group entry.	
The Delete button	Select an {Element} Group entry in the list box and click the <b>Delete</b> button to delete the {Element} Group entry.	

#### **Adding an Element Item Entry**

To add an {Element} entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined.



**Note:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.

Employee       Task Rules	View Sheets	Import / Export	Reports	Process Mana	gement	System Configuration	n A	ccount Administration
Manage Client           Client Groups         Client           (Al) Producio         Add         Addian Labs, hc. Addian Labs, hc. Addian Labs, hc. Addian Labs, hc. Addian Labs, hc. Addian Labs, hc. Bedian Labs, hc. CustomAp Incorporated DCS Enterpress Fixedb Technologies, hc. CustomAp Incorporated Labiver, incorporated Habore Explorement, hc. Proceedian Schware, hc. POS, hcorporated Guorun Ventures, LLC. Rehr Capital Group, Pc. Thomas & Partners, LLC. TrareScion Systems, hc.	Employee Element items Expense Edit	Holdays Tas Holdays Rep	k Rules proval Process porting Periods	Sefine Elements	ा अ	Custom Fields Task Rate Fields Customize Task Status Fields Customize	:≕ 0 (\$ 0 :≥ R	ustomize Entry Status Fields ustomize Approval Status Fields ate Tables
Client Groups         Client           (Ai) Paying Clients Pro-Bond         Add         Addam Labs. Inc. Alstom Technology, Incorporated AutoLink Engineering, Pic. BlackRock MandLorking Partners, Inc. Bluesprit Emergy Systems, Inc. Bright Ywe Exchange         Add           Delete         Delete         Delete         Delete           Delete         Delete         Delete         Delete           Leven Application Application Applications (Clickin Application	Manage Client							
(Alp Phylog Clents Pro-Bono Prospective Clents Work Exchange     Add     Addd       Delete     Open     BusARck MaintaCuturg Partners, Inc. BusARck MaintaCuturg Partners,	- Client Groups -				Client			
Trillet, hocporated ViskTei, Ro. VisiTei, hoc. Webner Microsystems, Inc.	(AB) Paying Clients Pro-Botio Prospective Clients Work Exchange			Add Open A	ddison Li Istom Tek ackRock kueprint Es Senter ritical Maria stomAppendie and the sight Nev eecon In eecon In eecon In eecon In sight Nev eecon In eecon In eecon In sight Nev eecon In sight Nev eecon In sight Nev eecon In sight Nev eecon In sight Nev eecon In sight Nev Adustion Er Common Sature	abs. hc. hcnoboy, hcorporated agneering, Pic. Manufacturing Partners, Inc. nergy Systems, Inc. be Extric Company se Technologies, Inc. be incorporated incomposes, Inc. entranational, Pic. entranational, Pic. entranational, Pic. entranational, Pic. entranational, Pic. entranational, Pic. SetWare, Inc. porated entures, LLC. Bartners, LLC. Systems, Inc. poprated entures, LLC. Systems, Inc. poprated entures, LLC. Systems, Inc. poprated entures, LLC.		Add Open Delete
Filter View All				Fi	ter View	All		~

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Bear in mind that since these are all user-defined elements, the items on your screen may be different from the items that appear in the figures on these pages. As an example, in these pages we will see how to manage (add/edit/delete) Client entries. Though the screens may be different, the steps to be followed will be the same for any item under the Element Items... button.

3. Click the **Add** button in the {Element} panel.

The {Element} dialog box will appear...

Client				х
Save & New X Cancel	N Element	Groups	Dependencies	Custom Fields
Element Name Abbreviation Status Active				

4. In the Element panel, type a name and an abbreviated name for the {Element}. Also, select the status of the item—Active or Inactive.

Item	How to use the Item	Default Value (if any)
Name	Type a unique name for the {Element}. For example, if you are adding a Client entry, type a name for the Client.	
Abbreviation	Type an abbreviated name for the {Element}. For example, if you are adding a Client entry, type an abbreviated name for the Client. This abbreviated name will be displayed on screens where there is insufficient space to display the full name.	
Status	From the <b>Status</b> drop-down list, select the status of the entry—whether it is "Active" or "Inactive".	Active

The following table describes the various items in the Element panel:

#### Assigning the Element Item to one or more Groups

- Client x Save & New Save & Close \* R X Cancel Groups Element Dependencies Custom Fields Actions Show Is not a member of Is a member of Paying Clients Pro-Bono Prospective Clients Work Exchange Add Remove
- 5. Click on the **Groups** button to display the Groups panel.

Use the Groups panel to assign the {Element} to one or more groups.

The following table describes the various items in the Groups panel:

	Item	How to use the Item	Default Value (if any)
143	Office Timesheets Installation an	d User's Guide   Copyright ® 2003-2020. Lookout S	oftware, LLC

Item	How to use the Item	Default Value (if any)
Is not a member of	The <b>Is not a member of</b> panel displays the {Element} Groups (if any) that have not been assigned to the {Element}.	
Is a member of	The <b>Is a member of</b> panel displays the {Element} Groups (if any) that have been assigned to the {Element}. <b>Note:</b> If you are creating a new {Element} entry, the <b>Is a member of</b> panel will be empty until you assign the {Element} to a group.	
The Add button	Select one or more group names from the <b>Is not a</b> <b>member of</b> panel and click the <b>Add</b> button to add the {Element} to those groups. When you click the <b>Add</b> button, the group names that you have selected will shift to the <b>Is a member of</b> panel, indicating that the {Element} is now a member of those groups.	
The Remove button	Select one or more group names from the <b>Is a</b> <b>member of</b> panel and click the <b>Remove</b> button to remove the {Element} from those groups. When you click the <b>Remove</b> button, the group names that you have selected will shift to the <b>Is not a</b> <b>member of</b> panel, indicating that the {Element} is no longer a member of those groups.	

## Specifying Dependency Element Items and Groups

6. Click on the **Dependencies** button to display the Dependencies panel.


Use the Dependencies panel to define the dependent element items and groups that can be used by an employee while making the task entries.

**NOTE:** You have to specify the dependent element items and groups only if you have previously defined certain elements to be dependent upon the {Element} item in the Task Rules screen.

The following table describes the various items in the Dependencies panel:

**NOTE:** These items will appear in the Dependencies panel only if you have previously defined certain elements to be dependent upon the {Element} item in the Task Rules screen.

Item	How to use the Item	Default Value (if any)
Dependent Element	All the elements that you have defined as dependent upon the {Element} item in the <b>Task Rules</b> screen will appear in the <b>Dependent Element</b> drop-down list. Select each item in turn and use the <b>Add</b> button to add the Dependent Element Items and Groups that can be used by the employee while making the task entries. <b>NOTE:</b> The items that appear in this drop-down list are taken from the <b>Task Rules</b> screen. If, in the <b>Task Rules</b> screen, you have specified certain elements to be dependent upon this Element Item, those elements will appear in the <b>Dependent Element</b> drop-down list. For example, if in the <b>Task Rules</b> screen, you have specified that Expense is dependent upon Client, then, when making a Client entry, Expense will appear in the <b>Dependent</b> <b>Element</b> drop-down list.	
	The Element Item and Group Dependencies panel	
Element Item and Group Dependencies	displays all the dependent element items and groups that you have set up for the {Element}. Use the <b>Add</b> and <b>Delete</b> buttons to add entries to, or delete entries from, this panel.	
The Add button	Click the <b>Add</b> button to add dependent element items and groups. Select the items and groups from the Select item dialog box that appears and click <b>OK</b> .	

Item	How to use the Item	Default Value (if any)
	Image: Second a group to the Element Item and Group drop-down list. The names of the items that belong to the selected group will appear in the Names panel.         Image: Second a group to the entire group, click on {Group} in the Names panel.         Image: Second a group to the entire group, click on {Group} in the Names panel.         Image: Second a group to the entire group, click on {Group} in the Names panel.         Image: Second a group to the entire group, click on {Group} in the Names panel.         Image: Second a group will be added to the Element Item and Group Dependencies panel.	
The Delete button	To remove an item from the <b>Element Item and Group</b> <b>Dependencies</b> panel, select the item and click the <b>Delete</b> button. <b>Office Timesheets</b> will ask whether you really want to delete the entry. <u>Microsoft Internet Explorer</u> <u>You are about to delete selected item(s). Continue?</u> <u>OK Cance</u> Click <b>OK</b> to delete the selected entry.	

Item	How to use the Item	Default Value (if any)
Elements in Group	<text><image/><text></text></text>	

## Entering Other Details About the Element Item

7. Click on the **Custom Fields** button to display the Custom Fields panel.

Client				x
Save & New Cancel	Element	Groups	Dependencies	Custom Fields
Actions			Show	
Custom Fields				
Contact	{No s	election} 🗸		
Address 1				
Address Line 2				
Address Line 3				
City				
State/Province				
Zip/Postal Code				
Country				
Phone				
Fax				
	_			

Use the Custom Fields panel to enter other details about the {Element}.

**NOTE:** The fields that you see in the Custom Fields panel are the same fields that you set up in the Custom Field Definitions for {Element} screen.

## Saving the Element Item Entry

Once you have made all the selections and specified all the details (as described in the previous topics), do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save this {Element} entry and start creating a new {Element} entry.
Click the Save & Close button	Save this {Element} entry and return to the <b>Manage {Element}</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>{Element}</b> dialog box	Return to the <b>Manage {Element}</b> screen without saving the new {Element} entry.

Viewing or Making Changes to an Element Item Entry

**NOTE:** Only systems administrators can make changes to Element Item entries.

To view or make changes to an {Element} entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined...

Employee	Task
Client	Holidays 🛄 Repo
Project Phase Sub-task	Process e )S
Cost Center Business Developme	nt

**NOTE:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.



**NOTE:** Since the element items are user-defined, each organization may have its own element items. Bear in mind that since these are all user-defined elements, the items on your screen may be different from the items that appear in the figures on these pages. As an example, in these pages we will see how to manage (add/edit/delete) Client entries. Though the screens may be different, the steps to be followed will be the same for any item under the Element Items... button.

- 3. Select an {Element} entry from the list in the {Element} panel and click the **Open** button.
- 4. Make changes to the {Element} entry.
- 5. Finally, do one of the following...

Do this	То
Click the Save & New button	Save the changes that you have made to the {Element} entry and start creating a new {Element} entry.
Click the Save & Close button	Save the changes that you have made to the {Element} entry and return to the <b>Manage {Element}</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>{Element}</b> dialog	Return to the <b>Manage {Element}</b> screen without saving the changes that you have made to the {Element} entry.

Do this	То
box	

#### **Deleting an Element Item Entry**

To delete an {Element} entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined.

-	View Sheets	s Import	/Export
-	Employee	22222200	🔁 Task
40	Element Items		🛃 Appr
	Client	Holidays	Repo
	Project		Process
	Phase		
	Sub-task	s ———	
	Cost Center		
Bu	siness Developmen	t	

**NOTE:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.



3. Select an {Element} entry from the list in the {Element} panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the {Element} entry.



4. Click **OK** to delete the {Element} entry or click **Cancel** if you do not wish to delete the {Element} entry.

**Creating an Element Item Group Entry** 

To add an {Element} Group entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined...

-	Employee	2212224	🔁 Task
90	Element Items		🛃 Appr
	Client	Holidays	Repo
	Project		Process
	Phase	4	
	Sub-task	)S	
	Cost Center		

**NOTE:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.



**NOTE:** Since the element items are user-defined, each organization may have its own element items. Bear in mind that since these are all user-defined elements, the items on your screen may be different from the items that appear in the figures on these pages. As an example, in these pages we will see how to manage (add/edit/delete) Client entries. Though the screens may be different, the steps to be followed will be the same for any item under the Element Items... button.

3. Click the **Add** button in the {Element} Group panel.

The {Element} Group dialog box will appear...

Client Group	x
Save & Close	
Group Name	
Not in group Addison Labs, Inc. Addison Technology, Incorporated AutoLink Engineering, Ric. Blueprint Energy Systems, Inc. Bright Vew Electric Company Critical Mass Technologies, Inc. CustomApp Incorporated DCS Enterprises Devide Technologies, Inc.	Add Remove

The following table describes the various items in the Employee Group dialog box:

Item	How to use the Item	Default Value (if any)
Group Name	Type a unique name for the group.	
Not in group	The <b>Not in group</b> panel displays the names of {Elements} which have not been assigned to the group.	
In group	The <b>In group</b> panel displays the names of {Elements} which have already been assigned to the group. <b>NOTE:</b> If you are creating a new entry, the <b>In</b> <b>group</b> panel will be empty until you add {Elements} to the group.	
The Add button	Select one or more {Elements} names from the Not in group panel and click the Add button to add the {Elements} to the group. When you click the Add button, the {Element} names that you have selected will shift to the In group panel, indicating that the {Elements} are now members of the group.	
The Remove button	Select one or more {Elements} names from the <b>In</b> <b>group</b> panel and click the <b>Remove</b> button to remove the {Elements} from the group. When you click the <b>Remove</b> button, the {Element} names that you have selected will shift to the <b>Not in</b> <b>group</b> panel, indicating that the {Elements} are no longer members of the group.	

4. Once you have made all the selections and specified the other details, do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save this {Element} Group entry and start creating a new {Element} Group entry.
Click the Save & Close button	Save this {Element} Group entry and return to the <b>Manage {Element}</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>{Element} Group</b> dialog box	Return to the <b>Manage {Element}</b> screen without saving the new {Element} Group entry.

**TIP:** Once you have created {Element} Groups and assigned {Elements} to the groups, you can quickly locate an {Element} entry, if you know which group it belongs to. When you click on the group name in the {Element} Groups panel, the names of only those {Elements} who belong to that group will be displayed in the {Element} panel. You can thus quickly locate the desired {Element} entry.

**TIP:** If you click on {All} in the {Element} Groups panel, Office Timesheets will display the names of all the {Element} entries in the {Element} panel.

### Viewing or Making Changes to an Element Item Group Entry

To view or make changes to an {Element} Group entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined.



**NOTE:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.

Encloyee       Task Rules       Custom Fields       Customize Approval Process         Encloses       Task Rate Fields       Customize Approval Status Fields         Contend terms       Task Rate Fields       Customize Approval Status Fields         Encloses       Task Rate Fields       Customize Approval Status Fields         Manage Client       Customize Approval Status Fields       Customize Approval Status Fields         Manage Client       Add       Add         Pro-Boo       Process       Client         Prosectice Clients       Open       Buschick Ranufactump Patients, Inc.         Buschick Ranufactump Patients, Inc.       Buschick Ranufactump Patients, Inc.       Buschick Ranufactump Patients, Inc.         Buschick Exchange       Delete       Critical Mass Technologies, Inc.       Customize         Open       Buschick Exchange Inc.       Delete       Delete       Custom International, Inc.         Midoto Engineering, Inc.       Process       Delete       Custom International, Inc.       Delete         Probleme Clients       Delete       Critical Mass Technologies, Inc.       Customize       Delete         Process       Critical Mass Technologies, Inc.       Customize       Customize       Delete         Process       Cristal Mass Technologies, Inc.       Customize<	View Sheets	Import / Export	Reports	Process Manag	gement	System Configuration	Account Ac	fministration
Manage Client         Cleater Groups       Client         (Al) Pro-Bono Pro-Bono Pro-Bono Pro-Bono Work Exchange       Add         Delete       Delete         Delete       Delete         Contrast Exploration Critical Mass Technology, Incorporated AutoLitic Engineering, Rc. BiscRock Manufacturing Partners, Inc. BiscRock Manufacturing Partners, Inc. BiscRock Manufacturing Partners, Inc. BiscRock Manufacturing Partners, Inc.       Delete         Delete       Delete       Delete       Delete         Virtual Mass Technologies, Inc. Customice, Incorporated DCS Entreprase Pacebie Pachologies, Inc. Customice, Incorporated Microsofte Corporated Microsofte Corporated Microsofte Corporated Microsofte Corporated Microsofte Corporated Microsofte Corporated Microsofte Senture, Inc. Plict Management, Inc.         TransCon Systems, Inc.       TransCon Systems, Inc.         Tritler, View Al       Microsofted Val/Tek, Inc.	Employee Element items Expense Edit	Holdays Tas Rep Process	sk Rules proval Process porting Periods s	Define Elements	Cu 2, Ta 12 Cu	stom Fields sk Rate Fields stomize Task Status Fields Customize	Customize E	intry Status Fields Approval Status Fields
Client       Add         (Ai)       Add         Paying Clents       Add         Pro-Bono       Prospective Clents         Work Exchange       Delete         Delete       Delete         Cricial Mass Technology, Incorporated       Open         Delete       Delete         Delete       Cricial Mass Technologies, Inc.         Custom Key Systems, Inc.       Delete         Delete       Cricial Mass Technologies, Inc.         Custom Key Systems, Inc.       Delete         Problem       Cricial Mass Technologies, Inc.         Custom Key, Incorporated       Delete         Delete       GeoCon International, Pic.         Higher Bo-Tech, Inc.       Imagint News Corporation         Memorizet, Incorporated       LeWave, Incorporated         Delete       Memorizet, Incorporated         Memorizet, Corporation       Memorizet, Inc.         Proverting Software, Inc.       Proverting, Inc.         Proverting Software, Inc.       Proverting Software, Inc.         Power Dy Software, Inc.       Proverting Software, Inc.         Power Dy Software, Inc.       Proverting Software, Inc.         Power Dy Software, Inc.       Proverting Software, Inc.         Valifek, Inc. <t< td=""><td>Manage Client</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Manage Client							
(Ai)       Add       Addson Labs, hc.       Addson Labs, hc.         Physig Clents       Pro-Bono       BackBook Maurtacturing Partners, lnc.       BackBook Maurtacturing Partners, lnc.         Prospective Clents       Delete       Delete       Cricial Mass Technology, hc.       Delete         Octomer Energy System, hc.       BackBook Maurtacturing Partners, lnc.       Delete       Dele	- Client Groups				Client -			
Filter View Al	(AB) Pro-Baoo Prospective Clients Work Exchange			Add AA Open A B Delete B F G C C C C C C C C C C C C C C C C C C	Idison Labd stom Techr toLink Eng lockRock M leprint Ene ght View B tical Mass stomApp I S Enterprir StomApp I S Enterprir S E	k, h.C. k, h.C. kology, incorporated hearing, P.C. nurfacturing Partners, Inc.: rgy Systems, Inc.: rgy Systems, Inc.: roursporated learne Compared learne Compared tests h.C. corporation necoporated proporation h.C. to corporated proporation h.C. to corporated proporation h.C. there, Inc. there, Inc. there		Add Open Delete
				Filt	er View	All	~	

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Bear in mind that since these are all user-defined elements, the items on your screen may be different from the items that appear in the figures on these pages. As an example, in these pages we will see how to manage (add/edit/delete) Client entries. Though the screens may be different, the steps to be followed will be the same for any item under the Element Items... button.

- 3. Select an {Element} Group entry from the list in the {Element} Group panel and click the **Open** button.
- 4. Make changes to the {Element} Group entry. (See Creating an Element Item Group entry for more information.)
- 5. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes that you have made to the {Element} Group entry and start creating a new {Element} Group entry.
Click the Save & Close button	Save the changes that you have made to the {Element} Group entry and return to the <b>Manage {Element}</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>{Element} Group</b> dialog box	Return to the <b>Manage {Element}</b> screen without saving the changes that you have made to the {Element} Group entry.

### **Deleting an Element Item Group Entry**

To delete an {Element} Group entry:

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}".

1. Click on **Element Items...** in the Process Management tab.

A drop-down menu appears that contains the elements that you have previously defined.



**NOTE:** The element items on your screen may be different from the element items that appear in the above figure, since these are all user-defined elements.

2. Click on an element item in the drop-down menu to open the Manage {Element} screen. For example, click on Client to open the Manage Client screen.

**NOTE:** Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen will appear, whereas if you click on "Project", the Manage Project screen will be displayed.



**NOTE:** Since the element items are user-defined, each organization may have its own element items. Bear in mind that since these are all user-defined elements, the items on your screen may be different from the items that appear in the figures on these pages. As an example, in these pages we will see how to manage (add/edit/delete) Client entries. Though the screens may be different, the steps to be followed will be the same for any item under the Element Items... button.

3. Select an {Element} Group entry from the list in the {Element} Groups panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the {Element} Group entry.



**NOTE:** You cannot delete a group that has some entries assigned to it. If you try to delete such a group, Office Timesheets will display the following message:

MICROSO	oft internet Explorer
	You cannot delete this group(s) because it is in use.
	ОК

To delete such a group, you will first have to remove the entries from the group.

## **Expense Items and Expense Item Groups**

Expense Items are user defined names and/or codes for categorizing expense types within an organization. Expense Items are typically used to correspond with special General Ledger (GL) account codes that have been setup in a company's accounting system so that expenses may be properly categorized, tracked, reported and/or reconciled.

Expense items may also be organized into groups just like employees and other element items. For example, you might create an Expense Group named "Travel & Entertainment" to categorize all travel & entertainment expenses; or you might create an Expense Item Group named "Billable Expenses" to group a set of expenses that are commonly billed back to a customer; etc.

Use the Manage Expense screen to add/edit/delete Expense Items and Expense Groups.



The following table provides more details about the components of the Manage Expense screen:

Item	How to use the Item	Default Value (if any)
Expense panel	This panel displays the list of Expense Items that have been made till now. It also has buttons to add, view/edit and delete Expense Items.	
The Add button	Click the <b>Add</b> button to add a new Expense Item.	
The Open button	Select an Expense Item in the list box and click the <b>Open</b> button to view or make changes to the Expense Item.	
The Delete button	Select an Expense Item in the list box and click the <b>Delete</b> button to delete the Expense Item.	

Item	How to use the Item	Default Value (if any)
Filter View	Select whether to view only active entries, inactive entries or all entries.	All
Expense Groups panel	This panel displays the list of Expense Groups that have been defined till now. It also has buttons to add, view/edit and delete Expense Groups.	
The Add button	Click the <b>Add</b> button to add a new Expense Group.	
The Open button	Select an Expense Group entry in the list box and click the <b>Open</b> button to view or make changes to the Expense Group entry.	
The Delete button	Select an Expense Group entry in the list box and click the <b>Delete</b> button to delete the Expense Group entry.	

## Adding an Expense Item Entry

To add an Expense Item entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen will appear...

View Sheets	Import / Export Reports	Process Management	System Configuration	Account Adr	ministration
Employee Element items Expense Edit	Holidays Task Rules Reporting Periods Process	Define Elements	ustom Fields ask Rate Fields ustomize Task Status Fields Customize	Customize En	ntry Status Fields pproval Status Fields
Manage Expense					
Expense Groups		Expense	e		
(AI) UPS		Add Arfare Open Computer & Computer & Courier Entertainme FedEx Stand Internet Lodging Meals Office Supp Phone Postage Printing Rential Car Shipping (NU UPS Ground UPS Overnig	uipment night iard lies in-Standard) hht		Add Open Delete
		Filter View	All	~	

2. Click the **Add** button in the Expense panel.

The Expense dialog box will appear...

Save & Close	Save & New Cancel	Definition	Groups	Custom Fields
Action			Show	
Name Description Act	tive 🔽			
Price Quantity Markup / Markdown	0.00 1.00 0.00			

- 3. In the Expense panel, type a name and a description for the expense item. Also, select the status of the item—Active or Inactive.
- 4. In the Price text box, enter a default price for the expense item.
- 5. In the Quantity text box, enter a default quantity for the expense item.
- 6. In the Markup/Markdown text box, type the markup or markdown rate. Use positive values to markup and negative values to markdown.
- 7. In the Tax text box, enter the tax rate applicable for the expense item.

**NOTE:** It is not necessary to enter values for Price, Quantity, Markup/Markdown and Tax. These values are optional and can be left blank. The actual value for these fields can be entered by a Timesheet user at the time of recording an expense.

#### Assigning the Expense Item to One or More Groups

Save & New Cancel	Definition Groups	Custom Fields	
Action	Show		
UPS	Add Remove		

8. Click on the **Groups** button to display the Groups panel.

Use the Groups panel to assign the expense to one or more groups.

The following table describes the various items in the Groups panel:

Item	How to use the Item	Default Value (if any)
Is not a member of	The <b>Is not a member of</b> panel displays the Expense Groups (if any) that have not been assigned to the expense item.	
Is a member of	The <b>Is a member of</b> panel displays the Expense Groups (if any) that have been assigned to the expense item. <b>NOTE:</b> If you are creating a new entry, the <b>Is a</b> <b>member of</b> panel will be empty until you assign the expense item to a group.	
The Add button	Select one or more group names from the <b>Is not a</b> <b>member of</b> panel and click the <b>Add</b> button to make the expense item entry a part of those groups. When you click the <b>Add</b> button, the group names that you have selected will shift to the <b>Is a member of</b> panel, indicating that the expense item is now a member of those groups.	
The Remove button	Select one or more group names from the <b>Is a</b> <b>member of</b> panel and click the <b>Remove</b> button to remove the expense item entry from those groups. When you click the <b>Remove</b> button, the group names that you have selected will shift to the <b>Is not a</b> <b>member of</b> panel, indicating that the expense item is no longer a member of those groups.	

## Entering Other Details About the Expense Item

9. Click on the **Custom Fields** button to display the Custom Fields panel.

Save & New X Cancel	Definition Groups Custom Fields
Action	Show
Custom Fields	
Expense ID	0
GL Account Code	0
Audit Code	{No selection}

Use the Custom Fields panel to enter other details about the expense item.

**NOTE:** The fields that you see in the Custom Fields panel are the same fields that you set up in the Custom Field Definitions for {Element} screen.

### Saving the Expense Item Entry

10. Once you have made all the selections and specified all the details (as described in the previous topics), do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save this Expense Item entry and start creating a new Expense Item entry.
Click the Save & Close button	Save this Expense Item entry and return to the <b>Manage Expense</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Expense</b> dialog box	Return to the <b>Manage Expense</b> screen without saving the new Expense Item entry.

### Viewing or Making Changes to an Expense Item Entry

To view or make changes to an Expense Item entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen appears...



- 2. Select an Expense Item entry from the Expense panel and click the **Open** button.
- 3. Make changes to the Expense Item entry.
- 4. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes you have made to the Expense Item entry and start creating a new Expense Item entry.
Click the Save & Close button	Save the changes you have made to the Expense Item entry and return to the <b>Manage Expense</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Expense</b> dialog box	Return to the <b>Manage Expense</b> screen without saving the changes you have made to the Expense Item entry.

#### **Deleting an Expense Item Entry**

To Delete an Expense Item entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen appears...



2. Select an Expense Item entry from the Expense panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Expense Item entry.



3. Click **OK** to delete the Expense Item entry or click **Cancel** if you do not wish to delete the Expense Item entry.

**NOTE:** You cannot delete an Expense Item entry which is being used. If you try to delete such an entry, Office Timesheets will display the following message:

Microso	ft Internet Explorer 🛛 🔀
♪	You cannot delete this record(s) because it is in use.
	ок

#### **Creating an Expense Group Entry**

Expense items may also be organized into groups just like employees and other element items. For example, you might create an Expense Group named "Travel & Entertainment" to categorize all travel & entertainment expenses; or you might create an Expense Item Group named "Billable Expenses" to group a set of expenses that are commonly billed back to a customer; etc.

To create an Expense Group entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen will appear...

View Sheets	Import / Export Reports	Process Management System Configuration Account Administration
Employee Element items Expense Edit	Holidays Process	Custom Fields Customize Entry Status Fields Customize Approval Status Fields
Manage Expense		
Expense Groups		Expense
(AI) UPS		Add     Arfare     Add       Open     Conjuter Equipment     Open       Entertainment     Fedix Standard     Delete       Herter     Loging     Meals       Office Supplies     Phone       Postage     Printing       Rental Car     Shipping (Non-Standard)       UPS Overnight     UPS Overnight
		Filter View All
-		

2. Click the **Add** button in the Expense Groups panel.

The Expense Group dialog box will appear...

Save & Close	
Action	
Group Name	
Not in group	In group
Airfare Computer Equipment Courier Entertainment FedEx Overnight FedEx Standard	

The following table describes the various items in the Expense Group dialog box:

Item	How to use the Item	Default Value (if any)
Group Name	Type a unique name for the group.	
Not in group	The <b>Not in group</b> panel displays the names of Expense Items that have not been assigned to the group.	
In group	The <b>In group</b> panel displays the names of Expense Items that have already been assigned to the group. <b>Note:</b> If you are creating a new entry, the <b>In</b> <b>group</b> panel will be empty until you add Expense Items to the group.	
The Add button	Select one or more Expense Items from the <b>Not in</b> <b>group</b> panel and click the <b>Add</b> button to add the Expense Items to the group. When you click the <b>Add</b> button, the Expense Items that you have selected will shift to the <b>In group</b> panel, indicating that the Expense Items are now members of the group.	
The Remove button	Select one or more Expense Items from the <b>In group</b> panel and click the <b>Remove</b> button to remove the Expense Items from the group. When you click the <b>Remove</b> button, the Expense Items that you have selected will shift to the <b>Not in</b>	

Item	How to use the Item	Default Value (if any)
	<b>group</b> panel, indicating that the Expense Items are no longer members of the group.	

3. Once you have made all the selections and specified the other details, do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save this Expense Group entry and start creating a new Expense Group entry.
Click the Save & Close button	Save this Expense Group entry and return to the <b>Manage Expense</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Expense Group</b> dialog box	Return to the <b>Manage Expense</b> screen without saving the new Expense Group entry.

**TIP:** Once you have created Expense Groups and assigned expense items to the groups, you can quickly locate an expense entry, if you know which group it belongs to. When you click on the group name in the Expense Groups panel, the names of only those expense items that belong to the selected group will be displayed in the Expense panel. You can thus quickly locate the desired expense item entry.

**TIP:** If you click on {All} in the Expense Groups panel, Office Timesheets will display the names of all the expense items.

Viewing or Making Changes to an Expense Group Entry

To view or make changes to an Expense Group entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen appears...

View Sheets	Import / Export Reports	Process Management System Configuration Account Administration
Employee Element items Expense Edit	Holidays Process	Customi Fields Customice Entry Status Fields
Manage Expense		
Expense Groups		Expense
(AR) UPS		Add     Arfree     Add       Open     Courser     Open       Entertannent     Pedx Vorright     Delete       Pedx Vorright     Delete     Delete       Internet     Lodging     Delete       Internet     Delete     Delete       Protage     Protage     Protage       Protage     Protage     Protage       Protage     Protage     Protage       VPS Ground     UPS Overnight     UPS Overnight
		Filter View All

- 2. Select an Expense Group entry from the Expense Groups panel and click the **Open** button.
- 3. Make changes to the Expense Group entry.
- 4. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; New</b> button	Save the changes you have made to the Expense Item entry and start creating a new Expense Group entry.
Click the Save & Close button	Save the changes you have made to the Expense Group entry and return to the <b>Manage Expense</b> screen.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Expense Group</b> dialog box	Return to the <b>Manage Expense</b> screen without saving the changes you have made to the Expense Group entry.

### **Deleting an Expense Group Entry**

To Delete an Expense Group entry:

1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen appears...



2. Select an Expense Group entry from the Expense Groups panel and click the **Delete** button.

Office Timesheets will ask whether you really want to delete the Expense Group entry...



3. Click **OK** to delete the Expense Group entry or click **Cancel** if you do not wish to delete the Expense Group entry.

**NOTE:** You cannot delete a group that has some expense items assigned to it. Office Timesheets will display the following message if you try to delete such a group ...

~	
1	You cannot delete this group(s) because it is in use.
-	
	OK

To delete such a group, you will first have to remove the expense items from the group.

# **Timesheets Templates**

The Timesheet Templates feature allows you layout a list of tasks and copy them to Employees, Employee Groups and/or other Timesheet Templates. To ensure project success many companies or organizational

departments use a standardized set of phases and tasks for most of their project. The Timesheet Templates feature allows you to layout your standardized task list for projects so you can more quickly pick and choose which of those tasks will be used on selected projects; and then assign those project tasks to employee more quickly and efficiently.

Most organizations also need a standardized set of non-project related tasks placed on their employee timesheets such as general administrative task codes (training, internal meetings, etc.); paid and non-paid leave tasks codes (vacation, sick time, maternity leave, etc.); and more. Timesheet Templates is a great feature for managing these standardized tasks; and allows you to copy them to a new employee's timesheet in a matter of seconds.

# **Timesheet Template Administration**

Timesheet Templates work similar to Employee and Employee Timesheets. Templates or Template Names are added, grouped, modified, and/or deleted from the from the Process Management area of Office Timesheets; while Timesheet Template tasks are created and managed from the View Sheets tab.

## **Adding New Templates**

To add a new Timesheet Template:

- 1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.
- 2. Click the **Add** button in the Timesheet Template column.
- 3. Type in a Name and Abbreviation for the Timesheet Template; and click **Save & Close** (or **Save & New** if you wish to immediately create another Timesheet Template).

View Sheets Import / Export	Reports Process Management System
<ul> <li>Employee</li> <li>Timesheet Templates</li> <li>Element Items</li> <li>Expense</li> <li>Edit</li> </ul>	Image: Second system       Image: Second system <td< td=""></td<>
Timesheet Template	
All}	Add Open BlackRock Gemini CapitalIVR Default Employee Tim Falcon BPO New Template PNC Extranet Silverleaf Standard Project Tem Super-FX TriNet API

### **Editing Existing Templates**

To edit an existing Timesheet Template:

1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.

- 2. Highlight the template name you wish to edit in the Timesheet Template column; and click the **Open** button.
- 3. Type in the edits for the Timesheet Template; and click **Save & Close** (or **Save & New** if you wish to immediately create another Timesheet Template).

Actions		Timesneet Template Groups	
	3	Show	
ne Black reviation BR G us Activ	kRock Gemini Gemini ve 💌		

### **Deleting a Template**

To delete a Timesheet Template:

- 1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.
- 2. Highlight the template name you wish to delete in the Timesheet Template column; and click the **Delete** button.

**NOTE:** You must delete all of a timesheet template's tasks before it can be deleted. If you attempt to delete a Timesheet Template that has tasks within the template the following message will appear...

	Message from web	page		
– Ti Ilack Japita Jefau Jalco Iew	Cannot	delete this Timesheet Templa	te(s), because it i	is in use.
NC E ilver itanc iupe				ОК
riNet /	API			

Timesheet Template task can be deleted using the Delete Tasks & Entries function found in View Sheets tab.

### **Grouping Templates**

Like Employees and Element Items, Timesheet templates can be placed in one or more groups. To add a Timesheet Template group and place Timesheet Templates to the group:

- 1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.
- 2. Click the **Add** button in the Templates Groups column.
- 3. Type in a Group Name for the Template Group; select the Timesheet Templates you wish to place in the group from the Not in group column and click the Add button (moving them to the In group column); and click **Save & Close** (or **Save & New** if you wish to immediately create another Templates Group).

Timesheet Templates	2222222 💆 Task Rule	s	👝 🔚 Custom Fields	Customize Entry Status Fields
ms	Approval	Process		
	Holidays Reporting	Periods	Templates Group	x
Edit	Process		Save & New	
emplate			Cancel	
Groups		Tin	Save & Close	
	Add	BlackR	Actions	
	Open	Capital	Group Name	
		Falcon	Government Contracts	
	Delete	PNC Ex	Not in group	
		Silverle Standa Super- TriNet	CapitaliVR Default Employee Timesheet Falcon BPO New Template Silverleaf Standard Project Template TriNet API	Add BlackRock Gemini PNC Extranet Super-FX

#### Setting a Template's activity status (Active/Inactive)

To change a Timesheet Templates activity status:

- 1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.
- 2. Highlight the template name you wish to edit in the Timesheet Template column; and click the **Open** button.
- 3. Click on the Status drop down to choose the status (Active/Inactive) you wish to set for template; and click **Save & Close**.

Timesheet T	emplate			X
Save & Close	Save & New	Timesheet Template	Groups	
A	Actions	Show		
Name Abbreviation Status	CapitalIVR CapIVR Active • Active Inactive			

## **Managing Template Tasks**

Timesheet Template Task management is performed from the **View Sheets** tabs. To access Timesheet Template Tasks navigate to the View Sheets tab; and click on the **Timesheets Templates** icon in the **View** ribbon group.



The templates task view is similar to the Timesheet view. However, unlike the Timesheet view, the Timesheet Templates view does not contain the time entry cell grid.

	Sign Out 🗧				admin	
	View She	ets Import / Export Reports	Process Management	System Configuration	on	
	Timesheet Expe	I Day Timesheet Templates	Add Tasks       ock       Image: Second	m Template 🔀 Mass U asks 没 Copy Ta	ik 🞲 Copy Selected Tasi pdate 😿 Delete Tasks And E asks	ks intries
		View		Task		
	Timesheet Tem	plate View				
Template Selector	BlackRock Gemini					•
List of tasks	Template	Client (Customer)	Project (Job)	Actvity (Service Item)	Sub-Activity (Class)	Pay Code (Payroll
for selected Template/s	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys	1.1 - Gather Requirements	Regular Time : ^
remplace/s	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys	1.2 - Write Specification	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys	1.3 - Specification Review	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.2 - Determine Resources	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.2.1 - Develop Schedule	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.3 - Schedule Review	Regular Time
Task Selection check	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.1 - Write Workflow	Regular Time
box - selected tasks can	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.2 - Workflow Review	Regular Time
be copied to specified	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.3 - Design Mockup	Regular Time
employees and/or other	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.3.1 - Review Design	Regular Time
timesneet templates	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.4 - Finalize Design	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	4 - Development	4.1 - Backend Development	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	4 - Development	4.2 - Frontend Development	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	4 - Development	4.3 - Installer Development	Regular Time
	BlackRock Gemini	BlackRock Manufacturing Partners, Inc.	Gemini CRM	4 - Development	4.4 - Development Communication	Regular Time 🗧 🚽

### Adding Tasks to a Timesheet Template

To add a task to a timesheet template:

- 1. Click on the Add Tasks icon in the Task ribbon group in the View Sheets tab...the New Task dialog will appear.
- 2. Click on the Employee/Timesheet Template drop down and choose Timesheet Template; select the appropriate template name; choose appropriate elements items; enter Task Start and Due dates if desired; enter Task rates hours if desired; make Task Status selection as needed; enter task notes if needed (by clicking on the Notes icon in the Show ribbon group; and **Save & Close** (or click **Save & New** if you wish to immediately create a new task after saving the current task).

New Task				x
Save & Close X Ca Actions	ve as Copy ve & New ncel Show			
Task Elements			ates	
Timesheet Template 🗨	{No selection}	 Start Date		
Employee Timesheet Template	{No selection}	 Due Date		
Project	{No selection}	 Task rates and hours		
Event	{No selection}	 Task rate	0.00	Get rate
Activity	{No selection}	 Budget	0.00	0.00
		Cost	0.00	0.00
		Est. to Complete	0.00	0.00
		Status Fields		
		Complete	🗖 Billa	ble
		On Hold		
		Cancelled		

**Editing Timesheet Template Tasks** 

- 1. Double-click on the Timesheet Template task you wish to edit.
- 2. Edit the task properties as desired; and click **Save & Close**.

**TIP:** Use the Save as Copy function if you wish to create new task by simply opening an existing task; and making small changes (example: changing "Activity" code and create as a new task). This function saves time in creating new task as saves time by eliminating task field selections.

Task					)
Save & Close Close Actions	ive as Copy ive & New incel				
— Task Elements —			Task Start and D	ue dates —	
Timesheet Template 👻	BlackRock Gemini		Start Date		
Client (Customer)	BlackRock Manufacturing Partners, Ir	1C	Due Date		
Project (Job)	Gemini CRM		Taak rates and baurs		
Actvity (Service Item)	1 - Requirements		Task rates and n	ours	
Sub-Activity (Class)	1.1 - Gather Reqs		Taskidle	55.00	Get rate
Pay Code (Payroll Iten	RT		Budget	55.00	210.00
			Cost	35.00	210.00
			Est. to Complete	55.00	210.00
			Complete		
			Billable		

### **Copying Selected Timesheet Template Tasks**

The Timesheet Templates Task view has built functionality to allows you easily select task from the view and quickly copy them to one or more employee timesheets; and/or one or more Timesheet Template Task Lists.

To copy selected timesheet template tasks:

1. Select the tasks you wish to copy in the Timesheet Templates Task view by checking task's checkbox; and click on the Copy Selected Tasks icon in Task ribbon group.

	Sign Out 🗧				admin	
	View Sheets	Import / Export Reports	Process Management	System Configuration		
	Timesheet Expenses	Timesheet Templates	ay Add Tasks me Clock Add Task From iteria Clock Re-generate T	Template 🔀 Copy Tasks Task	<ul> <li>Copy Selected Ta</li> <li>Delete Tasks And</li> </ul>	isks I Entries
	Timesheet Template	e View				
	BlackRock Gemini					-
	Template Cli	ient (Customer)	Project (Job)	Actvity (Service Item) Sub-	Activity (Class)	Pay Code (Payro
	🗸 BlackRock Gemini 🕴 Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys 1.1 - 0	Sather Requirements	Regular Time
[	🗸 BlackRock Gemini 🕴 Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys 1.2 - \	Write Specification	Regular Time
[	🗸 BlackRock Gemini 💠 Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analys 1.3 - S	Specification Review	Regular Time
[	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning 2.2 - D	)etermine Resources	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning 2.2.1	- Develop Schedule	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning 2.3 - 9	Schedule Review	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design 3.1 - \	Vrite Workflow	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design 3.2 - \	Vorkflow Review	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design 3.3 - D	)esign Mockup	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design 3.3.1	- Review Design	Regular Time
	BlackRock Gemini Bla	ackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design 3.4 - F	inalize Design	Regular Time
E F	BlackDeak Camiai Dia	al-Daal-Manufasturias Dastassa Jaa	Comini CDM	14 Development 144 F	and and Development	Decules Time

2. From the Copy Selected Tasks dialog box select choose Employee or Timesheet Template; select the Template/s, Template Group/s, Employee/s, or Employee Group/s you wish to copy the selected tasks to; choose the other task attributes you wish to copy; and click **OK**.

🗸 🗙	
OK Cancel	
Actions	
- Copy Selected	Tasks To
Employee	▼ {Group} Business Development
Copy task rates	Copy status fields Copy tracking info
Overwrite existin	n tasks

**TIP:** You can undo the last Copy Selected Task function you performed by clicking on the Copy Selected Task icon in the Tasks ribbon group of the View Sheets tab; and clicking on the Undo Last Copy icon in the Copy Selected Template Tasks dialog box.

Copy Selected Template Tasks	x
OK Cancel Undo Last Copy Actions	
Copy Selected Tasks To	
Employee   Ko selection	
Copy task rates Copy status fields	Copy tracking info Copy notes Only copy tasks that satisfy task rules

## Using the "Add Tasks From Template" function

You can add one or more tasks from a timesheet template directly to your timesheet from the Timesheet view in the View Sheets tab. To add a task from a template from the timesheet view:

1. Click on the Add Task From Template icon.

Vie	w Sheets	Import / Export	Reports F	Process Management	System Configura	tion Accou	unt Administration	
			Day	*	Add Task & Entry	Add Tas	sks 🔀	Mass Update
sheet	Expenses	Timesheet Templates	T Criteria	Add Time Entry	C Timer Off	Re-gene	erate Tasks	Delete Tasks And Entries
		View		Tin	Delete Time Entry ne Entry	🧭 Edit Task	k Task	

 From the Add Tasks From Template dialog box select the template you wish to view in using the template selection drop drown; select the task/s you wish to add to your timesheet using the task selection checkbox in the Add Tasks From Template dialog box; and click Save & Close (or click Save & New if you wish to add more tasks immediately after the previous action).

	Add Tasks From Template					x
	Save & N X Cancel	New Check All				
	Actions	Selection				
E	BlackRock Gemini					•
	Client (Customer)	Project (Job)	Actvity (Service Item)	Sub-Activity (Class)	Pay Code (Payroll Item)	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analysis	1.1 - Gather Requirements	Regular Time	Â
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analysis	1.2 - Write Specification	Regular Time	Ξ
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	1 - Requirements Analysis	1.3 - Specification Review	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.2 - Determine Resources	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.2.1 - Develop Schedule	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	2 - Planning	2.3 - Schedule Review	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.1 - Write Workflow	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.2 - Workflow Review	Regular Time	
	BlackRock Manufacturing Partners, Inc.	Gemini CRM	3 - Design	3.3 - Design Mockup	Regular Time	-
•	HIACKROCK MANUTACTURING					Þ

## **Example: Use Timesheet Templates to Create Default Employee Tasks**

A common use for Timesheet Templates is to create a template that contains a common set of tasks that are placed on every employee's timesheet. Here we've created a Timesheet Template named "Default Employee Timesheet" which contains a set of common non-project related tasks every employee will have placed on their timesheet.

You can select some or all of the tasks within a template by checking each task's corresponding selection checkbox...

Sign Out =					adı	min	
View Sheets	Import / Export	Reports Proc	cess Management	System Configu	ration		
Timesheet Expenses	Timesheet Templates	Day Time Clock	Add Tasks Add Task From	🗳 Edit Template 🔁 Mas sks 🚱 Cop	Task 👔 Copy Selectr s Update 😿 Delete Tasks y Tasks	ed Tasks And Entries	
	View			Т	ask		
Timesheet Template \	/iew						
Default Employee Times	heet						•
Template Clier	nt (Customer)	Pro	ject (Job)	Actvity (Service Ite	m): Sub-Activity (Class)	Pay Code (Pay	roll
Default Employee Tii N/A		N/A		0 - Leave	0.1 - Paid Leave	Holiday	3 *
Default Employee Tii N/A		N/A		0 - Leave	0.1 - Paid Leave	Sick Leave	
Default Employee Tii: N/A		: N/A		0 - Leave	0.1 - Paid Leave	Vacation	
Default Employee Tir: N/A		: N/A		7 - Administration	7.1 - Training	Regular Time	
V Default Employee Tii; N/A		N/A		7 - Administration	7.2 - Meetings	Regular Time	-

Once you have selected the tasks you wish to copy simply click on the **Copy Selected Tasks** icon in the **Task** ribbon group, and the **Copy Selected Template Tasks** dialog box will appear...

1 4		
OK Cancel		
Actions		
Copy Selecte	d Tasks To	
Employee	<ul> <li>Andrea Paulino</li> </ul>	

Choose **Employee** (or **Template** if you are copying the selected tasks another template) from the selection drop down; and select one or more employees and/or employee groups from using the selector button; check any appropriate copy options; and click **OK**.

# **Managing Timesheets, Expenses and Task Entries**

The main purpose of the Office Timesheets application is to help you manage and track your timesheets, expenses and tasks. Office Timesheets provides you with a Timesheet and an Expense sheet. Use the Timesheet to enter and track the time spent on your projects. Use the Expense sheet to maintain and track your project related expenses.

Timesheets and Expense sheets also provide a convenient way for your employees to keep track of the time and money spent on project related tasks. Employees can fill these time and expense sheets and submit them to their managers for approval.

Use the View Sheets tab to record your Time, Expense and Task entries. Using the functions of the View Sheets tab, you can:

- View/edit your timesheet or the timesheet of any of your employees.
- View your timesheet in different ways—week view, day view, time clock view.
- Specify filter criteria to configure the timesheet view to your liking.
- Add/View/Edit time entries.
- Add/View/Edit expense entries.
- Add/View/Edit task entries.
- Regenerate task entries.
- Perform a Mass Update of employee entries, time/expense entries and task entries.
- Copy task entries, task rates, status fields, notes etc. from one timesheet to one or more other timesheets.
- Delete time, task and expense entries.
- Send your timesheets for Approval (if you are an employee) and change the Approval Status of your employee's timesheets (if you are manager).

# The View Sheets tab

The View Sheets tab contains all the functions needed to manage your task, time and expense entries.

Timesheet View         Anderson A Brian       Toe       Vied       Toe       Vied       The         Employee       Client       Project       Phase       Sub-task       Sub-task       Sub-task       Sub-task       Sub-task       Toe       Vied       Thu       Z0 Aug	Tirresheet Ex	penses View	ock C Timer	On Off Off	Add Ta Re-gen	sks 🔀 erale Tasks 🎲 k 🏂 Task	Mass Copy Delete	Update Tasks Tasks And E	ntries Emp	ployee Man Approval	9 ager		
Anderson A Brian     • • • • • • • • • • • • • • • • • • •	Timesheet Vie	IW											
Employee         Client         Project         Phase         Sub-task         19 Aug         20 Aug         21 Aug         22 Aug         23 Aug           Anderson A Bran         I         I         I         Metroly Leave           000 <th>Anderson A Brian</th> <th>n</th> <th></th> <th></th> <th>* 44</th> <th>08/19/2007</th> <th></th> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th></th>	Anderson A Brian	n			* 44	08/19/2007		Sun	Mon	Tue	Wed	Thu	
Anderson A Brian  Addeson Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson A Brian  Addison Labs, Inc.  AccountStar  Business Analysis  Anderson Addison  Addison	Employee	Client	Project	Phase		Sub-task	-	19 Aug	20 Aug	21 Aug	22 Aug	23 Aug	
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on-task-based]         Image: Constraint of the second	Anderson A Brian	Addison Labs, Inc.	AccountStar	Busines	s Analysis								0:00
	on-task-based]												0:00
440 230 240 240 240													8
Aderson A Brian Personal Time.								4.00	2.20	2.00	0.00	0.00	100

The View Sheets tab has four ribbon groups—View, Time Entry/Expenses, Task and Approval—that contain the commands needed to manage your time, task and expense entries.

mesheet	Expenses	Day Time Clock	C Add Time Entry	Add Tasks Re-generate Tasks Z Edit Task	Copy Tasks	Employee Manager
	View		Time Entry		Task	Approval

The following table describes what each of the commands in the View Sheets tab does:

Click on	То
Timesheet	View/Edit your timesheet. Use the Timesheet View to set up the tasks to be carried out. You can also set a timer to record the time spent on your project.
Expenses	View/Edit your expense sheet. Use the Expense View to enter the various task- related amounts spent by you.
Add Expense Entry	Add an expense entry to a cell in the expense sheet.          Note: This command is available only when you are viewing your expense sheet.
Open Expense List	Display a list of expense entries in a particular cell of the expense sheet.

Click on	То
	<b>Note:</b> This command is available only when you are viewing your expense sheet.
Day	View your timesheet in Day View. Use Day View to enter the time spent on various tasks during the day or at different times of the day.
Time Clock	View your timesheet in Time Clock View. Use Time Clock View to see the starting and ending times of each of your tasks.
Criteria	Specify the criteria for displaying entries in the timesheet and expense sheet views.
Add Time Entry	Add a time entry to your timesheet.
Timer On	Start the stopwatch to begin recording the time spent on a task.
Timer Off	Stop the stopwatch to end recording the time spent on a task.
	Add task entries to your timesheet.
Add Tasks	<b>Note:</b> You can only add tasks while in Timesheet or Expense Sheet View.
Re-generate Tasks	Re-generate deleted tasks that have at least one entry.
Edit Tasks	Make changes to task entries on your timesheet.
Mass Update	Perform a Mass Update of employee entries, time/expense entries and task entries.
Copy Tasks	Copy Task entries, task rates, status fields, notes etc. from one timesheet to one or more other timesheets.
Delete Tasks And Entries	Delete task and/or expense entries that meet with specific criteria. For example, delete all tasks that do not have any entries.
Employee	View the status of your timesheets and submit them to your manager for approval.
Manager	View the status of the timesheets submitted by your employees and approve or reject them.

# **Viewing your Timesheet**

Office Timesheets provides three different ways to view your timesheet as described in the following table:

Click on...

To View...
Click on	To View
Timesheet	The Default ViewThis view shows 5, 7 or 10 days at a time (depending on how you have set up the timesheet view). Use the Timesheet View to set up the tasks to be carried out. You can also set a timer to record the time spent on your project.TIP: Use the Sheets View Criteria screen to configure the view of the timesheet.
Day	<b>The Day View</b> This view shows a day at a time. Using the Day View you can see how your tasks are spread out across the day. Use this view to set up or track tasks during the different time slots of the day.
Time Clock	The Time Clock View This view shows 5, 7 or 10 days at a time (depending on how you have set up the timesheet). In the Time Clock View you can see the starting and ending time of each task. TIP: Use the Sheets View Criteria screen to configure the view of the timesheet.

### **Timesheet View**

The Timesheet View is the view of the timesheet that you get to see by default.

Click on the **Timesheet** icon in the View Sheets tab to open the Timesheet View...

View Sheets Import / Export	Reports Proce	ess Management System Confi	igurati	on Accou	int Administra	tion						
Timesheet Timesheet Templater	Day Time Clock Criteria	Add Task & Er C Timer On Add Time Entry Add Time Entry C Delete Time Er	ntry	Add Tas Add Tas Re-gene	ks k From Templati erate Tasks k	E Mass Copy Delete	Update Tasks : Tasks And Enti	ries Er	nployee Mana	ger		
View		Time Entry				Task			Approval			
Timesheet View [Filtered] Anderson ABrian		· (4 06/27/2011	•	Mon 27 Jun	Tue 28 Jun	Wed 29 Jun	Thu 30 Jun	Fri 01 Jul	Sat 02 Jul	Sun 03 Jul		
Client Project :	Event	Activity										
Addison Labs, Inc. AccountStar	Business Analysis										0:00	^
Addison Labs, Inc. Accountstar :	Business Analysis	Assessments of marketing opportunit	les :	0.00							0:00	
Addison Labs, Inc. AccountStar	Business Analysis	Design Presentation		0.00							0:00	
Addison Labs, Inc. AccountStar	Business Analysis	intelligence gathering of customers									0:00	
Addison Labs, Inc. AccountStar	Development	Eesture Coding	-		8:00						8:00	
Addison Labs, Inc. AccountStar	Pre-Contract	Communication		*	0.00	1.00					1:00	
Addison Labs, Inc. AccountStar	Pre-Contract	Formal proposal		*		2:00					2:00	
Addison Labs, Inc. Greenlite Help Desk	Requirements Gathering	Interface Design									0:00	
[Non-task-based]		-									0:00	
												Ŧ
Anderson A Brian, Addison Labs, AccountStar, Pre-Co	on, Fp			8:00	8:00	3:00	0:00	0:	00 0:00	0:00	19:00	

In this view you get to see 5, 7 or 10 days at a time (depending on how you have set up the Timesheet View).

**TIP:** Use the Sheets View Criteria screen to configure the view of the timesheet.

NOTE: You may see a small red or blue indicator in some of the cells in the Timesheet View.

- If a red square is displayed next to a task in the Timesheet View, it indicates that there is a note attached to that task entry.
- If a blue square is displayed in a cell it indicates that there are multiple entries in that cell.

## Adjusting your timesheet view's task element column widths

Office Timesheets will allow to adjust each task element column's width to your own personal preference. To adjust a particular column's width simply point your mouse at the task element column's divider in the column header; and while pressing down your mouse button expand the column to its desired width by dragging left or right.

Cindy Thompson				4/25/2011 🔢 🖽 🕨
Client (Customer)	Project (Job)	Actvity (Service Item	Sub-Activity (Class)	Pay Code (Payroll
AutoLink Engineering, Plc.	Capital IVR	6 - Rollout	; 6.1 - Install	Regular Time
AutoLink Engineering, Plc. 🧹	🗄 Capital IVR 🛛 🪽	6 - Rollout	6.2 - Configure	Regular Time
AutoLink Engineering, Plc.	Capital IVR	6 - Rollout	6.3 - Feature Test	Regular Time
AutoLink Engineering, Plc.	Capital IV	; 6 - Rollout	6.4 - Pilot Test	Regular Time
AutoLink Engineering, Plc.	: Capital IVR	; 6 - Rollout	; 6.5 - Training	Regular Time
AutoLink Engineering, Plc.	E Capital IVR	: 6 - Rollout	6.6 - System Administration	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	6 - Rollout	; 6.1 - Install	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	: 6 - Rollout	6.2 - Configure	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	6 - Rollout	6.3 - Feature Test	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	: 6 - Rollout	6.4 - Pilot Test	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	6 - Rollout	6.5 - Training	Regular Time
BlackRock Manufacturing Partners, Inc.	Gemini CRM	: 6 - Rollout	6.6 - System Administration	Regular Time
BlueWater, Inc.	: Capital IVR	6 - Rollout	6.1 - Install	Regular Time
BlueWater, Inc.	: Capital IVR	: 6 - Rollout	6.2 - Configure	Regular Time
BlueWater, Inc.	Capital IVR	6 - Rollout	6.3 - Feature Test	Regular Time

NOTE: Office Timesheets will save your task element column width settings until you change them again.

## The Non-task-based task row

The Non-task-based row is designed to show time entered for tasks that are no longer visible. The Non-taskbased row is a total of all time entries, by day, for tasks that are no longer visible in the user's timesheet task row. Having this row is helpful to the user and/or administrator in knowing that time that was entered for a given reporting period didn't simply disappear.

View Sheets Import / Export	Reports Pro	cess Management System	Configuration	Account	Administratio	ı
Timesheet View [Filtered]	Day     Time Clock     Triteria	Add Tas C Timer Or Add Time Entry Delete Time Time Entry	k & Entry f me Entry	Add Tasks Add Task F Re-generat ZEdit Task	rom Template e Tasks Tas	Hass Upda Copy Tasks
Aston C. Tara	Event	<ul> <li>• • • • • • • • • • • • • • • • • • •</li></ul>	Mon 06 Aug	Tue 07 Aug	Wed 08 Aug	Thu 09 Aug
	Lven	Maternity Leave	2 2 2			
		Personal Time				
		Sick Leave Vacation	5 5 5			
Addison Labs, Inc. untStar	Business Analysis		4:00	3:00	2:00	
Addison Labs, Inc. ccountStar	Development	Feature Coding	- 	4:00	6:00	8:00
Addison Labs, Inc. Greenlite Help Desk		1	9 9 9			
[Non-task-based]			4:00	<b>1:00</b>		

You may see a task row labeled **[Non-task-based]** on the Timesheet view. The View Criteria for the selected user determines whether or not this line item is visible to a user or not *(refer to the topic: "Configuring the Timesheet and Expense Sheet View" for more details)*.

View Sheets	Import / Export	Reports Pro	ocess Management	System Configuratio	n Account Administration
		1 Day	Re-generate	Tasks	
Timesheet Expenses	Timesheet Templates	Criteria	Copy Tasks	And Entries	
	View		Task		
Sheets View Criteria					
— Task elements —				Task Status Fields ——	]
Client	{AII}		)   Co	mplete	Unchecked 👻
Project	{AII}		Bill	able	Ignore 👻
Event	{All}		On	Hold	Ignore 👻
Activity	{AII}		Ca	ncelled	Ignore 👻
Order				Dates	
Level Employee/Template Client	Sort Ascend Ascend	Show M ling - M	Move Up ove Down To	Use dates	
Project	Ascend	ling 👻 🔽		er Show current 👻	
Event	Ascend	ling 🚽 🔽 🖊		Show	
Activity	Ascend	ling 👻 🔽	Sn	ow	Names -
			Da	ys count	/ V
				Show Non-Task-Based E	Entries
					Save

Tasks may be removed from a user's timesheet view in a number of ways (one or more tasks are outside of the task's start and due date range; one or more of a task's element items are being filtered; one or more of the task's statuses are being filtered: etc.). Tasks are typically removed from a user's timesheet as a part

general timesheet and task management. Keeping the task list as short as possible makes time entry faster and easier for the end user.

#### **Day View**

In the Day View, you get to see a day at a time. Using the Day View you can see how your tasks are spread out across the day. Use this view to set up or track tasks during the different time slots of the day.

Click on Day in the View Sheets tab to open the Day View...

**NOTE:** In the following figure, some parts have been enclosed with an orange outline. With the mouse pointer, point to each of these enclosed areas to learn about the functionality of that area. A tooltip will appear telling you more about that area.

**TIP:** If the tooltip disappears before you are able to read the entire text, move the mouse pointer out of the area and then bring it back into the area, to make the tooltip reappear.

Note: If a red square is displayed next to an entry, it indicates that there is a note attached to that entry.

View	Sheets	Import / Export	Reports	Process Management	System Configuration	Account Administration
Timesheet	Expenses	Time Clock	Add Time Ent	ry 😨 Re-generate Tasi	ks 🛛 Delete Tasks And Er	tries
	View	1 children	Time Entry	Gy copy rushs	Task	
Day View						
Anderson A Bri	an	* 4	08/19/2007			
					Sunday 08/19/2007	
08:00 AM						
08:00 AM		3:00 Anderson A Bri	an, , , , Vacation			
08:00 AM		1:00 Anderson A Bri	an, , , , Personal Tir	ne		
08:30 AM						
09:00 AM						
09:30 AM						
10:00 AM						
0:30 AM						
1:00 AM						
1:30 AM						
2:00 PM						
2:30 PM						
1:00 PM						
1:30 PM						
2:00 PM						
2:30 PM						
03:00 PM						
3:30 PM						
14:00 PM						
04:00 PM		1:00 Anderson A Bri	an, , Personal Tir	ne		
4:30 PM						
5:00 PM						
5:30 PM						
		5:00				

#### **Time Clock View**

In the Time Clock View, you can see the starting and ending time of each task. In this view you will be able to see 5, 7 or 10 days at a time (depending on how you have set up the timesheet).

TIP: Use the Sheets View Criteria screen to configure the view of the timesheet.

Click on Time Clock in the View Sheets tab to open the Time Clock View.

**NOTE:** In the following figure, some parts have been enclosed with an orange outline. With the mouse pointer, point to each of these enclosed areas to learn about the functionality of that area. A tooltip will appear telling you more about that area.

**TIP:** If the tooltip disappears before you are able to read the entire text, move the mouse pointer out of the area and then bring it back into the area, to make the tooltip reappear.

View Sheets	Import / Export	Reports F	rocess Management	System Co	onfiguration	Account Ac	dministration			
	Day	Add Time Entry	Re-generate Task	Del	ete Tasks And E	Entries				
	Time Clock		S Mass Update							
Timesheet Expenses	T Criteria		Copy Tasks							
View		Time Entry		Task		3				
Time Clock View										
inderson A Brian			- 08/19/2007	7 🔢 😕	Sun 19 Aug	Mon 20 Aug	Tue 21 Aug	Wed 22 Aug	Thu 23 Aug	
				Start	MA 00:80	09:00 AM	MA 00:80	-		
				Stop	09:00 AM	09:30 AM	10:00 AM			
				Start	08:00 AM	11:00 AM				
				Stop	11:00 AM	01:00 PM				_
				Start	04:00 PM					
				Start	02.00 PM					
				Stop						
			No	Start/Stop	0.00	3:30	0.00	0.00	0.00	
						E.0.5	2.00	0.00		

In Time Clock View, the entries in a column are always filled from the first row down. Even if you double-click on a cell in a lower row, the entry will automatically be placed in the first non-blank cell of that column.

**NOTE:** The time entries are sorted in order of start time—an entry which starts earlier is put higher in the list.

TIP: If a red square is displayed next to a task entry, it indicates that there is a note attached to that entry.

## **Viewing your Expense Sheet**

Use the Expense sheet to record or keep track of your project related expenses.

Click on Expenses in the View Sheets tab...

**NOTE:** In the following figure, some parts have been enclosed with an orange outline. With the mouse pointer, point to each of these enclosed areas to learn about the functionality of that area. A tooltip will appear telling you more about that area.

View Sh	eets Import / Export	t Reports Proc	ess Management Sy	stem Configurati	ion Accou	nt Administratio	on					
		1 Day	Add Expense Entry	🗦 Add Tasks	3	SR Mass Upd	ate					
		Time Clock	Onen Exnense List	Add Task	From Template	Conv Task	•					
					to Taaka	Delete Tee	ka And Entring					
Timesheet Exp	Timesheet Templ	ates Chiena		Ke-yenera	ite idsks		KS AND ENDES	Employee	Manager			
				Z Edit Task	_							
	View		Expenses		la	sk		Appr	oval			
Expenses Viev	/											
Anderson A Brian			- (* 06/20/2	2011	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Client	Project	Event	Activity		20 Juli	21 Jun	22 Jun	25 Juli	24 Jun	25 Jun	20 Juli	
Addison Labs, Inc.	AccountStar	Business Analysis			-							0.00
Addison Labs, Inc.	AccountStar	Business Analysis	Assessments of marketin	g opportunities	1							0.00
Addison Labs, Inc.	AccountStar	Business Analysis	Assessments of target m	arkets 📕	8							0.00
Addison Labs, Inc.	AccountStar	Business Analysis	Design Presentation		8							0.00
Addison Labs, Inc.	AccountStar	Business Analysis	intelligence gathering of c	customers 📕	2	105.60						105.60
Addison Labs, Inc.	AccountStar	Development	Feature Coding									0.00
Addison Labs, Inc.	AccountStar	Development	Feature Testing		8							0.00
Addison Labs, Inc.	AccountStar	Pre-Contract	Communication	-	8							0.00
Addison Labs, Inc.	AccountStar	Pre-Contract	Formal proposal		8							0.00
Addison Labs, Inc.	Greenlite Help Desk	Requirements Gathering	Interface Design		8							0.00
[Non-task-based]												0.00
Anderson A Brian, Add	lison Labs, AccountStar, De	v, Feature Coding			0.00	105.60	0.00	0.00	0.00	0.00	0.00	105.60

In this view you get to see 5, 7 or 10 days at a time (depending on how you have set up the Expense sheet View).

**TIP:** Use the Sheets View Criteria screen to configure the view of the Expense sheet.

**NOTE:** You may see a small red or blue indicator in some of the cells in the Expense sheet View.

- If a red square is displayed next to a task, it indicates that there is a note attached to that task entry.
- If a blue square is displayed in a cell it indicates that there are multiple expense entries in that cell.

# **Configuring the Timesheet and Expense Sheet View**

Office Timesheets allows each user to configure the View Criteria of their Timesheet and Expense sheet. The Sheets View Criteria tool allows you to:

- Sort the entries in a particular way. For example, sort the entries by Employee so that all the entries of an employee are listed together.
- View all entries having a specific Task status. For example, view the entries of a project which has been put on hold.
- View the entries for a specific range of dates.
- Specify whether to show the full name or abbreviations.
- Specify the number of columns/days to be displayed at a time.
- Specify whether or not to show non-task-based entries.

To configure the Timesheet and Expense sheet view:

1. Click on Criteria in the View Sheets tab.

The Sheets View Criteria screen will appear...

View Sheets	Import / Export	Reports	Proce	ess Managen	nent S	System Configuratio	n Account Administra
Timesheet Expenses	Timesheet Templates	Day	Clock ia	Re-gene Hass Up Copy Ta	erate Tasks pdate isks asks And Er	ntries	
Sheets View Criteria	view		][		Iask		
Task elements Client Project Event Activity	{AII} {AII} {AII} {AII} {AII}				Complete Billable On Hold Cancellee	Status Fields ——— 9 d	Unchecked ↓ Ignore ↓ Ignore ↓ Ignore ↓
Order <u></u> Level Employee/Template Client Project	Sort Ascend Ascend Ascend	Shov	Mov	ove Up ve Down	Dates Use d From To Filter Sh	dates	
Event Activity	Ascent	ling ↓ ♥			Show Show Days cou Always st	nt art timesheet on v Non-Task-Based E	Names 7 Monday Entries
				Ĺ			Save

- 2. Make selections from the various fields in the Sheets View Criteria screen.
- 3. Click on the **Save** button to save the Criteria settings.

**Note:** If you move to some other page before clicking the Save button, the changes you have made will be discarded. Therefore, remember to always click the Save button before you move away from the page.

**TIP:** If you do not want to save your changes, move to some other page without clicking the Save button.

4. Now if you click the Timesheet button, you will notice that the Timesheet screen has changed according to the Criteria settings specified by you.

# TIP: DON"T WANT TO GRANT USERS ACCESS TO VIEW CRITERIA, BUT WANT THEM TO BE ABLE TO SEE TASKS THAT HAVE BEEN FILTERED FROM THEIR TIMESHEET? USE THE **FILTER ON/OFF** FUNCTION

Office Timesheet includes an optional button, Filter On/Off, which can be added to a user's timeheet/expense view. Items are often filtered from the timesheet when they are marked "Complete" or "On Hold", for example. However, an employee may want to view time entry details on a timesheet/expense sheet where items have been filtered from it. The Filter On/Off button allows the employee to view filtered items with a click of the Filter On/Off button.

To the add the Filter On/Off button to a user's timesheet/expense view you must add it to the user's specified security policy. To add it:

1. Open the specified user's security policy,

# **Adding Tasks to a Timesheet**

To add tasks to your Timesheet:

1. Click on the Add Tasks icon in the View Sheets tab.

The Task dialog box will appear...

				X
Save & Close	Save as Copy Save & New Cancel Show			
			ue dates —	
Employee	V James Quinn	Start Date		
Personnel Classification	{No selection}	Due Date		
Client	{No selection}	Task rates and h	ours	
Project	{No selection}	Task rate	0.00	Get rate
Phase	{No selection}	Budget	0.00	0.00
Deliverable	{No selection}	Cost	0.00	0.00
		Est. to Complete	0.00	0.00
<ul> <li>Task appearance</li> </ul>	e options	Otatus Elalda		
C fask will display f	for the current time reporting period only			
I ask will stay on t	the timesheet permanently			
		Billable		

**Note:** The Task dialog box may look different on your screen. For example, there may be different names for the elements of the task (in the Task elements panel). This is because Task Elements are user-defined and thus could be different from organization to organization. Similarly, some of the other items may or may not be visible, depending on the rights that have been assigned to you.

- 2. In the Task Elements panel, specify values for each Task element by clicking each element level's button and selecting values from the Select Item dialog box that appears.
- 3. In the Task appearance options panel select if you want the tasks to display the task permanently on your timesheet; or if you only want the task to display on the timesheet for the current timesheet reporting period.
- 4. In the Task Start and Due dates panel select a start date and due date for the task if desired.
- 5. Use the Task rates and hours panel to keep track of the task rates if desired. Type Rates in the first column and Hours in the second column.

**NOTE:** You can use these fields for calculations in Office Timesheets report writers. For example, you could take all the hours from a particular task and multiply them by a budgeted amount (Budget Rate x Budget Hours) and then compare them to the real Rates and Hours (from the Cost fields). Thus, this would give you a comparison of Budget vs. Actual. By having it broken down by hours and rates you

could then get a comparison of the total calculated cost (rate x hours) or you could even compare budget hours vs. actual hours, for example.

**NOTE:** If you click the Get rate button, Office Timesheets will look-up and display the pre-defined hourly payable rate that you have specified in the Rates panel of the Employee dialog box for the selected employee.

**TIP:** The labels for these fields are customizable. Thus, you could call them anything you like. However, the default labels for them are as follows: Budget, Cost and Est. to Complete.

**NOTE:** Some of the fields in the Task rates and hours panel—like Estimate to Complete—are also used for tracking task information, when using the built-in Microsoft Project Integration with Office Timesheets.

6. If appropriate, select one or more statuses for the task in the Status Fields panel.

**NOTE:** The Status Fields are user-defined and therefore may appear different from default values shown in our screenshots.

- 7. Click on the **Notes** button if you wish to notate the task entry.
- 8. Once you have made all the selections and specified all the details, do one of the following:

Do this	То
Click the <b>Save &amp; New</b> button	Save this Task entry and start creating a new Task entry from scratch.
Click the Save & Close button	Save this Task entry and return to the timesheet.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Task</b> dialog box	Return to the timesheet without saving the new Task entry.

# Viewing or Making Changes to Task Entries

To view or make changes to a Task entry:

- 1. Click on the **Timesheet** icon in the View Sheets tab to display your Timesheet.
- 2. In the left-half of the Timesheet, double-click on the task entry you want make changes to; or in the right-half of the Timesheet, click on the row of the task entry you want to edit (in the blue area) and then click the **Edit Task** button.

The Task dialog box will appear...

Task				;
Save & Close	Save as Copy Save & New Cancel	\$ S		
Task Elements		Task Start and	Due dates	
Employee	→ Aston C. Tara	Start Date		
Client	Addison Labs	Due Date		
Project	AccountStar	Task rates and	hours	
Event	Bus Analysis	Task rate	85.00	Get rate
Activity	{No selection}	Budget	180.00	55.00
		Cost	0.00	0.00
		Est. to Complete	0.00	0.00
		Status Fields		
				abla
			Dilla	able
		Cancelled		

- 3. Make the required changes to the Task.
- 4. Finally, do one of the following...

Do this	То
Click the Save As New button	Save the changes to the Task entry as a new Task entry.
Click the Save & Close button	Save the changes to the Task entry and return to the Timesheet.
Click the <b>Save as Copy</b> button	This option only appears when modifying an existing task. It allows you to open an existing task, make modification and save as a new task on the timesheet without modifying the task you originally opened.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Task</b> dialog box	Return to the Timesheet without saving your changes.

# **Copying Tasks between Timesheets**

You can copy tasks from one employee's timesheet to one or more other timesheets.

To copy tasks:

1. Click on Copy Tasks in the View Sheets tab.

The Copy Tasks screen will appear...

View Sheets       Import / Export       Reports       Process Management       System Configuration       Account of the configuration         Image: Stress stresss stress s						
Image: Second secon	View Sheets	Import / Export	Reports Pro	cess Management	System Configuration	Αςςοι
Copy Tasks         Task Elements         Employee To Employee V         Aston C. Tara         Olient         Addison Labs         Project         (All)         Event         (All)         Activity         (All)         (All)         (Copy task rates         (Copy status fields)         (Only copy tasks that satisfy task rules         Undo Last Copy         OK	Timesheet Expenses	Timesheet Templates	Day Time Clock	Re-generate Ta C Mass Update Copy Tasks Delete Tasks Ai Task	isks nd Entries	
Task Elements         From       To         Employee To Employee V       Aston C. Tara       Anderson A Brian          Client       Addison Labs        Addison Labs          Project       (All)        (All)          Event       (All)        (All)          Activity       (All)        (All)          V       Copy task rates       V       Copy status fields       V       Copy tasks that satisfy task rules         Only copy tasks that satisfy task rules       Undo Last Copy       OK	Copy Tasks			<u>^</u>		
From       To         Employee To Employee        Aston C. Tara       Anderson A Brian         Client       Addison Labs       Addison Labs         Project       {All}       (All)         Event       {All}       (All)         Activity       {All}       (All)         V Copy task rates       V Copy status fields       Copy tracking info       Copy notes         Overwrite existing tasks       Only copy tasks that satisfy task rules	Task Elements					
Employee To Employee V       Aston C. Tara        Anderson A Brian          Client       Addison Labs        Addison Labs          Project       (AII)        (AII)          Event       (AII)        (AII)          Activity       (AII)		From		То		
Client       Addison Labs          Project       {All}          Event       {All}          Activity       {All}          V       Copy task rates       V       Copy status fields       V       Copy tracking info       V       Copy notes         Overwrite existing tasks       Image: Copy tasks that satisfy task rules       Undo Last Copy       OK	Employee To Employee 👻	Aston C. Tara		Anderson A Brian		
Project       {AII}	Client	Addison Labs		Addison Labs		
Event       {AII}	Project	{AII}		{All}		
Activity       {AII}        {AII}          Image: Copy task rates       Image: Copy tasks fields       Image: Copy tasks fields       Image: Copy tasks fields       Image: Copy tasks fields         Image: Copy tasks       Image: Copy tasks fields	Event	{AII}		{All}		
Copy task rates       Copy status fields       Copy tracking info       Copy notes         Overwrite existing tasks       Only copy tasks that satisfy task rules         Undo Last Copy       OK	Activity	{AII}		{All}		
	<ul> <li>Copy task rates</li> <li>Overwrite existing tasks</li> </ul>	Copy status field	s 🔽 Cor	oy tracking info y copy tasks that satis Undo Las	Copy notes fy task rules st Copy OK	]

- 2. In the From column, use the 🗔 buttons to select the entries you wish to copy.
- 3. In the To column, use the buttons to select the criteria for the copies. For example, to copy all the entries to a particular employee's timesheet, select that employee's name in the Employee row.
- 4. Specify whether to copy the task rates, the status fields, the task tracking info and the task notes by checking the relevant check boxes.

**TIP:** If you want to only copy the tasks without copying any of the rates, statuses etc., do not check any of the check boxes.

5. Finally, click the **OK** button.

Office Timesheets will copy the tasks that match the criteria you have specified, and display a message telling you how many entries it has copied.

#### Undo your last copy task routine

Office Timesheets has the ability to undo the last copy task routine you ran. To undo your last copy task routine:

- 1. Navigate to the View Sheets tab; and click on the Copy Tasks icon in the Task ribbon group.
- 2. From the Copy Tasks form click on the **Undo Last Copy** button.

	/iew Sheets	Import / Export	Reports	Proces	s Management	System Co	onfiguration	Accou
Timeshee	t Expenses	Timesheet Templates View	1 Day 1 Time Clo 1 Criteria	ock	<ul> <li>Re-generate Tas</li> <li>Mass Update</li> <li>Copy Tasks</li> <li>Delete Tasks An Task</li> </ul>	iks d Entries		
Copy Ta	asks							
Task I	Elements —							
		From			То			
Employee	To Employee 👻	Aston C. Tara			Anderson A Brian			
Client		Addison Labs			Addison Labs			
Project		{AII}			{AII}			
Event		{AII}			{AII}			
Activity		{All}			{AII}			
Copy ta	ask rates ite existing task	Copy status field	ls 🔽	Copy tr Only co	acking info py tasks that satisf Undo Last	Copy n y task rules Copy	OK	

# **Adding Time Entries**

Office Timesheets provides many ways for you to add time entries to your timesheet. You can:

- Directly type into a cell.
- Use the Time Entry dialog box.
- Use a Timer to enter task starting and ending times.
- Use the Add Task & Entry dialog box.

You can also use the Day View or the Time Clock View to make time entries.

## **Directly Typing Values into a Cell**

You can directly type the amount of time spent on a task into a cell. This method is handy when your timesheet already contains the task entries, and all you need to do is fill in the time spent on a task in a given day.

To directly type a time entry:

- 1. Click on Timesheet in the View Sheets tab, to open your timesheet.
- 2. Click on a blank cell in any date column, and type the time spent on the task for that date.



3. Press the Enter key on your keyboard.

**NOTE:** You can use this method on blank cells only. Office Timesheets will not allow you to directly type into a cell that already has a time entry.

## **Using the Time Entry Dialog Box**

You can use the Time Entry dialog box to make time entries. This is useful when:

- There is already an entry in the cell; or
- You want to also enter other details for the entry such as the start and end time for the task, the status of the task etc.

**NOTE:** While making a time entry, you cannot change or select any of the task elements (in the Task Elements panel). This is because you are making the time entry for an existing task. If you want to change the task details, click **Cancel** to close the Time Entry dialog box, and double-click on the task (in the left-half of the timesheet).

To make time entries using the Time Entry dialog box:

- 1. Click on Timesheet in the View Sheets tab, to open your timesheet.
- 2. Click on a cell in any date column.
- 3. Click on the Add Time Entry button; or double-click on the cell.

The Time Entry dialog box will appear...

Time Entry		3	c
Save & Close Close	te Time Entry Notes Show		
Task Elements		Time entry data	_
Employee	Aston C. Tara	Entry date	
Client	Addison Labs, Inc.	Time Spent Only	
Project	AccountStar	Start time 08:11 PM	
Event	Development	Time spent 0:00	
Activity	Feature Coding	Approval status	
		No timesheet status	
		Status Fields	
		Billable	
		Overtime Shift Differentia	
		Overtime_Shift Differentia	

4. In the Time entry data panel, specify the start time and end time for the task. Office Timesheets will automatically calculate the Time spent on the task.

OR

In the Time entry data panel, specify the start time and time spent on the task. Office Timesheets will automatically fill in the end time for the task.

**NOTE:** If the Start time and End time fields are not visible, uncheck the Time Spent Only check box.

5. Make other selections in the Approval status and Status Fields panels.

**NOTE:** These items will only be visible if the Security Policy assigned to your account permits you to make these entries.

6. Click the Notes button to display the Notes panel.

e Entry		
<b>V</b> a 1		
A Cancel	POX 1/2	
Delete		
& Close	Time Entry Notes	
Actions	Show	
tes for your time entry her	a.	
s for your time entry her	4	

- 7. Type any notes or comments about the time entry.
- 8. Click on the Save & Close button to save the entry and close the Time Entry dialog box.

OR

Click on the **Cancel** button to return to the timesheet without saving the entry.

**Note:** While trying to save the entry if you get the following error message:

"This entry cannot be saved without an existing task because of insufficient security rights"

...it means that the Require existing task check box is checked in the Entries panel of the Security Profile attached to your user account. If this setting is checked, Office Timesheets will allow you to create an entry against an existing task only.

**NOTE:** If you have added a note to the entry, Office Timesheets will display a red square symbol in the cell to remind you that there is a note attached to the entry.

## **Using the Timer**

Instead of specifying the time spent on a task or typing in the starting and ending time for a task, you can use Office Timesheets' built-in Timer to record the time spent by you on a task. Switch on the timer when you start working on a task, and switch off the timer when you finish working on the task.

To use the Timer:

1. Click on Timesheet in the View Sheets tab, to open your timesheet.

**NOTE:** The timer can only be used in the Timesheet View.

2. Click on a cell in the current date column.

**NOTE:** The Timer can only be used on the current date.

- 3. Click on the Timer On button.
- 4. The Timer will start and Office Timesheets will display the time elapsed in red in the cell.

**NOTE:** While the timer is running you can go on to do other work. You can even log out of Office Timesheets. When you return to Office Timesheets, you will find that the timer will still be running.

5. When you finish working on the task, return to the timesheet, click on the cell, and click on the Timer Off button.

Office Timesheets will display the time spent on the task in blue.

# **Using the Day View**

The default view of the timesheet displays a number of days at a time. (Office Timesheets can be set to display either 5, 7, or 10 days in the Timesheet view.

However, you can switch to the Day View to view an entire day at a time. This is useful when there are multiple entries for a given date. In the Day View you can see the starting and ending time of each of the time entries.

Timesheet E	penses View	C Add Ti C Timer ( C Timer ( Time Er	me Entry 2 A On 2 R Off 2 Ec	dd Tasks 😥 Mas: e-generate Tasks 🥥 Copy dt Task 💥 Dele Task	update Tasks e Tasks And Er	ntries Er	npioyee Mana Approval	9 ger		
Anderson A Brian	1		•	** 08/20/2007	Mon	Tue	Wed	Thu	Fri	
Employee	Client	Project	Phase	Sub-task	20 Aug	21 AUG	22 AUg	23 Aug	24 AUG	
Anderson A Brian				E Maternity Leave						0:00 🗠
Anderson A Brian				E Medical Leave						0:03
Anderson A Brian				Personal Time	2:00	200		-	(	4:00
Anderson A Brian				Sick Leave	_		Cell with	100		0:00
Anderson A Brian				: Vacation	0:30					0:30
Anderson A Brian	Addison Labs, Inc.	AccountStar	Business Analy	vsis 🗄 📕	<b>#</b> 4:00	)	multiple			4:00
Non-task-based]					22		entries			2:30

To switch to the Day View:

• Click on Day in the View Sheets tab.

View Sheet	ts Import / Export Reports Process Management System Configuration Account Administration	0
Timesheet Expense	Opp         Op         Add Time Encly         20 Re-generate Tasks         20 Delete Tasks And Entres           Image: Time Encly         Time Encly         20 Re-generate Tasks         20 Delete Tasks And Entres           Image: Time Encly         Time Encly         20 Re-generate Tasks         20 Delete Tasks And Entres           Image: Time Encly         Time Encly         20 Re-generate Tasks         20 Delete Tasks	
Vie	tw Time Entry Task	
Day view		
Anderson A Brian	* * 08/29/2007	
	Monday 08/20/2007	
LAW PHI		
11:00 AM	2:00 Anderson A Brian, . , Documentation,	1000
1:30 AM		
2:00 PM		
2:30 PM		
1:00 PM		
1:30 PM		
2:00 PM		11
02:00 PM	2:00 Anderson A Brian, Personal Time	
2:30 PM		
3:00 PM		
3:30 PM		
4:00 PM		
4:30 PM		
5:00 PM		
5:30 PM		
6:00 PM		
	9.00	

The Day View is organized like a time planner. In the Day View, the entire day is divided into time-slots of half-an-hour each.

**NOTE:** You can specify the starting and ending time, as well as the time interval, in the Time Entry Options screen of the System Configuration tab.

To enter a time entry in the Day View:

- Double-click on a time-slot (cell); or
- Click on a cell and then click on the Add Time Entry button.

## **Using the Time Clock View**

The default view of the timesheet displays a number of days at a time. (Office Timesheets can be set to display either 5, 7, or 10 days in the Timesheet view.

You can switch to the Time Clock View to view the starting and ending times of the time or task entries. This is useful when there are multiple entries for a given date.

Timesheet View	W	Time Entry	Edt Tas	k 🔆 Dele Task	te Tasks And Er	tries	oloyee Manaj Approval	jer		
Anderson A Brian			• •	08/20/2007	Mon	Tue	Wed	Thu	Fri	
Employee C	lient i l	Project Pt	ase	Sub-task	EU Aug	21,009	22 409	25 Aug	24 MUY	
Anderson A Brian				Maternity Leave		1.1.1.1.1.1				0:00
Anderson A Brian				Medical Leave					· · · · · · · ·	0:03
Anderson A Brian				Personal Time	2:00	200		7	S	4:00
Anderson A Brian				Sick Leave			Cell with			0:00
Anderson A Brian				Vacation	0:30				S	0:30
Anderson A Brian A	ddison Labs, Inc. 🗄	AccountStar Bu	siness Analysis	1	#4:00		multiple			4:00
ion-task-based]					22		entries			2:30

Click on Time Clock in the View Sheets tab to switch to the Time Clock View:

0			Iministration	Account Ad	noisuration	cess Management System C	Reports Pro	Import / Export	New Sheets	
				ntries	ete Tasks And E	👷 Re-generate Taska 💥 De 🔁 Mass Update 資 Copy Tasks	Add Time Entry	Day Criteria	Expenses	Timesheet
				4		Task	Time Entry		View	Time Cir
	Fri 24 Aug	Thu 23 Aug	Wed 22 Aug	Tue 21 Aug	Mon 20 Aug	• • • • • • • • • • • • • • • • • • • •			Brian	Inderson A
<u>^</u>				08:00 AM 10:00 AM	08:00 AM 10:00 AM	Start Stop				
					08:00 AM 10:00 AM	Start Stop				
					09:00 AM 09:30 AM	Start Stop				
					10:00 AM 10:30 AM	Start Stop				
					11:00 AM 01:00 PM	Start Stop				
					02:00 PM 04:00 PM	Start Stop				
						Start Stop				
	0:00	0:00	0:00	0:00	0:00	No Start/Stop				
11:00	0.00	0:00	0:00	2.00	9:00		r, Business Analysis, .	bs, Inc., AccountStar	ian, Addison La	lerson A Br

The Time Clock View is similar to the Timesheet View. However, instead of the details of the task, you can see the starting and ending time of each of the time entries.

**NOTE:** The No Start/Stop row displays the total time spent for those entries that do not have a start or a stop time.

To enter a time entry in the Time Clock View:

- Double-click on a time-slot (cell); or
- Click on a cell and then click on the Add Time Entry button.

## **Viewing or Making Changes to Time Entries**

To view or make changes to a Time entry:

1. Click on Timesheet in the View Sheets tab to display your Timesheet.

In the right-half of the Timesheet, Double-click on a cell in the timesheet, to open the Time Entry dialog box for the time entry in that cell.

**NOTE:** If there are multiple time entries in a cell, Office Timesheets will not allow you to edit the entry by double-clicking on it in the Timesheet View. In this case, you will have to switch to either the Day View or the Time Clock View to be able to make changes to the entry.

- 2. Make the required changes to the Time entry.
- 3. Click on the **Save & Close** button to save the changes and close the Time Entry dialog box; or click on the **Cancel** button to return to the timesheet without saving the changes you have made to the entry.

## **Adding Expense Entries**

Use the Expense sheet to record or keep track of your project related expenses.

To add expenses to the Expense Sheet:

1. Click on Expenses in the View Sheets tab to open your Expense Sheet.

Timesheet E	cpenses	Clock Clock	d Expense Entry	Add Tasks Re-generate Tasks ZEdt Task	Copy Tasi	ale ks sks And Entries	Employee	Manager proval		
Expenses Vie	w									
Anderson A Bria	n		~)(u	08/20/2007	Mon	Tue	Wed	Thu	Fri	
Employee	Client	Project	Phase	Sub-task	20 Aug	21 AUg	22 Aug	23 Aug	24 AUG	
Anderson A Brian				Maternity Leave						0.00
Anderson A Brian				Medical Leave						0.00
Anderson A Brian				Personal Time		28.00				28.00
Anderson A Brian				Vacation	III 1600.00					1600.00
Anderson A Brian			Research	Sick Leave		8	(			0.00
Anderson A Brian	Addison Labs, Inc.	AccountStar	Business Analys	s i 🛛 📕	6.09					6.09
ion-task-based]						· · · · · · · · · · · · · · · · · · ·				0.00
nderson A Brian, , ,	, Personal Time,			_	1605.09	28.00	0.00	0.00	0.00	1634.09

In this view you get to see 5, 7 or 10 days at a time (depending on how you have set up the timesheet view).

**TIP:** Use the Sheets View Criteria screen to configure the view of the timesheet.

2. Click on a cell and then click on the Add Expense Entry button, to open the Expense Entry dialog box.

Expense Entry		x
Save and Close Actions	Expense Entry Notes	
Task Elements	Anderson A Brian	Expense Entry Entry Date 07/11/2011
Client Project	Addison Labs AccountStar	Description         Hote/Lodging Purchase            Price         118.00         Total           Outputty         1.00         118.00
Activity	Aot Lodging	Markup/down         Percentage ↓         0.00         0.00            Tax %         8.25         9.73
		Apply Tax to Markup / Markdown 127.73
		No timesheet status
		Status Fields Billable Overtime Overtime_Shift Differenti: Overtime_Shift Differenti:

3. Select an expense item in the Task Elements panel.

**NOTE:** When you select an expense item, Office Timesheets will display the description, price, markup/markdown rate and tax rate for the item, if you have specified these details while defining the Expense Item.

4. Enter the details of the expense entry in the Expense Entry panel.

**TIP:** You can change the values that Office Timesheets has displayed in these fields. For example, if the price of the item is different from that which Office Timesheets has displayed, you can type in the new price. The value you type here will not affect the value that has been specified for the item in the Manage Expense screen.

5. Make other selections in the Approval Process and Status Fields panels.

**TIP:** These items will only be visible if the Security Policy assigned to your account permits you to make these entries.

6. Click the Notes button to display the Notes panel.



- 7. Type any notes or comments about the expense entry.
- 8. Click on the **Save & Close** button to save the entry and close the Expense Entry dialog box; or Click on the **Cancel** button to return to the expense sheet without saving the entry.

**NOTE:** If you have added a note to the entry, Office Timesheets will display a red square symbol in the cell.

# Viewing or Making Changes to Expense Entries

To view or make changes to an Expense entry:

- 1. Click on the Expenses icon in the View Sheets tab to display your Expense sheet.
- 2. In the right-half of the Expense sheet, double-click on a cell that contains an expense entry; or click on the cell and click on the Open Expense List button.

Office Timesheets will display the Expense List dialog box...

OK Add				
- Expense Entries -				
Expense Code	Description	Employee	Total	
1 Rental Car	Car Rental Pure	chase Anderson A Bria	in	400.00
2 Airfare	Airfare Ticket Pu	urchas Anderson A Bria	in	1200.00

3. Click on an expense in the Expense List and click the **Open** button, to open the Expense Entry dialog box.

TIP: Click the Add button, instead of Open, to add a new expense entry to the cell.

- 4. Make the required changes to the Expense entry.
- 5. Finally, do one of the following...

Do this	То
Click the <b>Save &amp; Close</b> button	Save the changes to the Expense entry and return to the Expense sheet.
Click the <b>Cancel</b> button or the <b>Close</b> button on the top right corner of the <b>Expense Entry</b> dialog box	Return to the Expense sheet without saving your changes.

# Mass Updating Task, Time, and Expense Entries

Office Timesheets allows you to make collective changes to task, expense and time entries. With one command you can make changes to hundreds of entries.

Use the Mass Update... command of the View Sheets tab to update or change all (or a subset) of your time, expense and/or task entries.

View Sheets	Import / Export	Reports Prod	cess Management	System Configuration	Account Administration			
Timesheet Expenses	Timesheet Templates	Day Time Clock	Copy Tasks	s Entries				
Mass Update								
Elements					Employees			
Employee -	{AII}				Lock time			
Client	{AII}				Lock expense			
Project	{AII}				Change rates			
Event	{AII}							
Activity	{AII}							
Time/Expense Entr	ies	E	Modify time entries		Tasks Change start date Change due date Change rate Task Status Fields Complete Billable On Hold Cancelled	Include Ignore • Ignore • Ignore • Ignore •	Set as Ignore Ignore Ignore Ignore	•
						Undo last updat	e	ок

**NOTE:** The Mass Update screen contains four panels—Elements, Time/Expense Entries, Employees, and Tasks. Excluding the Elements panel, the other three panels may or may not be visible depending upon the access rights provided to you in the Security Policy attached to your User Account.

The Mass Update... command is very powerful. Using the Mass Update screen you can:

- Change the status of time and/or expense entries.
- Lock time entries.
- Lock expense entries.
- Change pay rates.
- Change the start and /or due dates for a task.
- Change the status of task entries.

The following table describes the elements of the Mass Update screen:

Item	How to use the Item	Default Value (if any)
The Elements panel	Use the contents of the <b>Elements</b> panel to specify the criteria for selecting the records that you want to update. Click on the various is buttons and select values from the Select Element dialog box that appears. <b>Note:</b> The items in the <b>Elements</b> panel are user-defined. Hence the items on your screen may be different from the items shown in the above figure.	

Item	How to use the Item	Default Value (if any)		
	TIP: You need not select items from all the elements. For example, if you want to update a particular employee's Standard Pay Rate, only select the employee's name (by clicking on the <b>Employee</b> row). Or, if you want to update the status of a specific task of a particular client, then select only the Client's name (from the <b>Descent</b> ) button in the <b>Client</b> row) and the Project name (from the <b>Descent</b> ) button in the <b>Project</b> row). Office Timesheets will update the values of only those records that match the criteria you set in the <b>Elements</b> panel.			
The Time/Expense Entries panel	Use the <b>Time/Expense Entries</b> panel to select whether to modify the status of time entries, expense entries or both. If you specify a range of dates ( <b>From/To</b> ), Office Timesheets will update only those entries that fall within the range of dates.			
Modify expense entries	Check the <b>Modify expense entries</b> check box if you want to modify the status of Expense entries. <b>NOTE:</b> The rest of the items (i.e. <b>From</b> , <b>To</b> and the <b>Entry Status</b> panel) appear only after you have selected either the <b>Modify expense entries</b> check box or the <b>Modify time entries</b> check box.	Unchecked		
<i>Modify time entries</i>	Modify time entriesCheck the Modify time entries check box if you want to modify the status of Time entries.Modify time entriesNOTE: The rest of the items (i.e. From, To and the Entry Status panel) appear only after you have selected either the Modify expense entries check box or the Modify time entries check box.			
From	If you want to limit the update to a range of entries between two specific dates, specify the starting date in the <b>From</b> box, using the Date Picker. <b>NOTE:</b> The <b>From</b> box is visible only after you have selected either the <b>Modify expense entries</b> check box or the <b>Modify time entries</b> check box. <b>NOTE:</b> If you don't specify the <b>From</b> date, Office Timesheets will update entries starting from the	Hidden from view		

How to use the Item	Default Value (if any)
first entry.	
If you want to limit the update to a range of entries between two specific dates, specify the ending date in the <b>To</b> box, using the Date Picker. <b>NOTE:</b> The <b>To</b> box is visible only after you have selected either the <b>Modify expense entries</b> check box or the <b>Modify time entries</b> check box.	Hidden from view
<b>NOTE:</b> If you don't specify the <b>To</b> date, <b>Office</b> <b>Timesheets</b> will update entries right up to the last entry.	
The Entry Status Fields panel displays the names of the various Entry Status Fields. NOTE: The Entry Status Fields panel is visible only after you have selected either the Modify expense entries check box or the Modify time entries check box. The panel also contains two columns—Include and Set as. For every status field you want to change, select a value in the Include column, and specify the new value in the Set as column. For example, to mark the entries as 'Billable', in the Billable row, select "Unchecked" in the Include column and "Checked" in the Set as column. TIP: At times, you may want to change the status of an entry irrespective of the current status of that entry. In that case, select "Ignore" in the Include column, and specify the new value in the Set as column. For example, to set the Approval status of all entries to "Approved" irrespective of the current Approval status of the entries, select "Ignore" in the Include column, and "Approved" in the Set as column. NOTE: The entry status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.	Hidden from view
For any Entry Status value you want to change, select the current value of the Entry Status Field from the drop-	
	How to use the Itemfirst entry.If you want to limit the update to a range of entries between two specific dates, specify the ending date in the To box, using the Date Picker.NOTE: The To box is visible only after you have selected either the Modify expense entries check box or the Modify time entries check box.NOTE: If you don't specify the To date, Office Timesheets will update entries right up to the last entry.The Entry Status Fields panel displays the names of the various Entry Status Fields.NOTE: The Entry Status Fields panel is visible only after you have selected either the Modify expense entries check box or the Modify time entries check box.The panel also contains two columns—Include and Set as. For every status field you want to change, select a value in the Include column, and specify the new value in the Set as column. For example, to mark the entries as Billable', in the Billable row, select "Unchecked" in the Include column, and specify the new value in the Set as column. For example, to set the Approval status of all entries to "Approved" in the Include column, and specify the new value in the Set as column. For example, to set the Approval status of all entries to "Approved" in the Include column, and specify the new value in the Set as column. For example, to set the Approval status of all entries to "Approved" in respective of the current Approval status of the entries, select "Ignore" in the Include column, and "Approved" in the Set as column.NOTE: The entry status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.For any Entry Status value you want to change, select the trem to the ent

Item	How to use the Item	Default Value (if any)
	down list in the <b>Include</b> column. For example, to change the status of Overtime from "No" to "Yes", in the Overtime row, select "Unchecked" in the Include column.	
	<b>NOTE:</b> The entry status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.	
Set as	For any Entry Status value you want to change, select the new value of the Entry Status Field from the drop-down list in the Set as column. For example, to change the status of Overtime from "No" to "Yes", in the Overtime row, select "Checked" in the Set as column. <b>NOTE:</b> The entry status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or	
The Employees penal	Use the <b>Employees</b> panel to lock time and/or expense	
The Employees panel	entries, and change the rates for employees.	
Lock time	Check the <b>Lock time</b> check box to disallow changing of time entries prior to a specific date. Specify the date using the Date Picker. Office Timesheets will then lock the time entries prior to the specified date. <b>NOTE:</b> The Date Picker will appear only after you should the Lock time should have	Unchecked
	check the <b>Lock time</b> check box.	
Lock expense	Check the <b>Lock expense</b> check box to disallow changing of expense entries prior to a specific date. Specify the date using the Date Picker. Office Timesheets will then lock the expense entries prior to the specified date.	Unchecked
	<b>NOTE:</b> The Date Picker will appear only after you check the <b>Lock expense</b> check box.	
Change rates	Check the <b>Change rates</b> check box to change the standard or overtime rates for the employees. Select the rate item that you wish to change from the <b>drop-down list</b> .	Unchecked
	<b>NOTE:</b> The <b>drop-down list</b> and the <b>Rate</b> , <b>Start</b> <b>Date</b> and <b>End Date</b> items will appear only after you check <b>Change rates</b> .	

Item	How to use the Item	Default Value (if any)	
	Type the new rate in the <b>Rate</b> box.	Hidden from	
Rate	<b>NOTE:</b> The <b>Rate</b> box becomes visible only after you have checked the <b>Change rates</b> check box.	view	
	In the <b>Start Date</b> box, use the Date Picker to specify the starting date for the rate change.		
Start Date	<b>NOTE:</b> The <b>Start Date</b> box becomes visible only after you have selected the <b>Change rates</b> check box.	Hidden from view	
End Date	Check the <b>End Date</b> check box to specify an ending date. Once you select the <b>End Date</b> check box, Office Timesheets will allow you to specify the ending date, using the Date Picker.	Hidden from view	
	<b>NOTE:</b> The <b>End Date</b> box becomes visible only after you have selected the <b>Change rates</b> check box.		
The Tasks Panel	Use the <b>Tasks</b> panel to change the start date, due date and rates for tasks. You can also change the value of the task status fields.		
Change start date	Check the <b>Change start date</b> check box to change the starting date of the tasks. Use the Date Picker to specify the new start date.	Unchecked	
	<b>NOTE:</b> The Date Picker will appear only after you check <b>Change start date</b> .		
Change due date	Check the <b>Change due date</b> check box to change the due date of the tasks. Use the Date Picker to specify the new start date.	Unchecked	
	<b>NOTE:</b> The Date Picker will appear only after you check <b>Change due date</b> .		
Change rate	Check the <b>Change rate</b> check box to change the rate for the tasks. Type the new rate in the Change rate box.	Unchecked	
	<b>NOTE:</b> The <b>Change rate</b> box will appear only after you check the <b>Change rate</b> checkbox.		
The Task Status Fields panel	The <b>Task Status Fields</b> panel displays the names of the various Task Status Fields. The panel contains two columns— <b>Include</b> and <b>Set as</b> . For every status field you		

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Item	How to use the Item	Default Value (if any)
	want to change, select a value in the <b>Include</b> column, and specify the new value in the <b>Set as</b> column. For example, to mark the tasks as 'Billable', in the <b>Billable</b> row, select "Unchecked" in the <b>Include</b> column and "Checked" in the <b>Set as</b> column. <b>TIP:</b> At times, you may want to change the status of an entry irrespective of the current status of that entry. In that case, select "Ignore" in the <b>Include</b> column, and specify the new value in the <b>Set as</b> column. For example, to mark a task as "Cancelled" irrespective of the current status of the tasks, select "Ignore" in the <b>Include</b> column of the <b>Cancelled</b> row, and "Checked" in the <b>Set as</b> column.	
	<b>NOTE:</b> The task status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.	
Include	For any Task Status value you want to change, select the current value of the Task Status Field from the drop-down list in the <b>Include</b> column. For example, to change the status of Billable from "No" to "Yes", in the <b>Billable</b> row, select "Unchecked" in the <b>Include</b> column.	
	<b>NOTE:</b> The task status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.	
Set as	For any Task Status value you want to change, select the new value of the Task Status Field from the drop-down list in the <b>Set as</b> column. For example, to change the status of Billable from "No" to "Yes", in the <b>Billable</b> row, select "Checked" in the <b>Set as</b> column.	
	<b>NOTE:</b> The task status fields are all user-defined. Hence the items on your screen may be different from the items shown in the above figure, or mentioned in the above examples.	
The OK button	After specifying the details as given above, click the <b>OK</b> button to perform the update. Office Timesheets will update the entries and then display a message.	

Item	How to use the Item	Default Value (if any)
	Microsoft Internet ExplorerMass Update is done.OK	

### Undo your last mass update routine

Office Timesheets has the ability to undo the last mass update routine you ran. To undo your last mass update routine:

- 1. Navigate to the View Sheets tab; and click on the Mass Update icon in the Task ribbon group.
- 2. From the Mass Update form click on the **Undo last update** button.

Mass Update									
Elements					Employees				
Employee 👻 {A	All}				Lock time				
Client {/	AII}				Lock expense				
Project {/	All}				Change rates				
Event {/	All}								
Activity {A	All}								
Time/Expense Entries					Tacke				
Modify expense entrie	S		Modify time entries		Change start date				
То	07/31/2011				Change due date				
- Entry Status Fields -					Change rate				
	Includ	•	Set as		Task Status Fields				
Billable	Ignore	-	Ignore	•		Include		Set as	
Overtime	Ignore	<b>•</b>	Ignore	•	Complete	Ignore	•	Ignore	•
Overtime_Shift Different	ial 1 Ignore	•	Ignore	•	Billable	Ignore	•	Checked	-
Overtime_Shift Different	ial 2 Ignore	•	Ignore	•	On Hold	Ignore	•	Ignore	-
Approval status	Ignore		→ Ignore	•	Cancelled	Ignore	•	Ignore	-
									014
						Undo last up	odati	e	UK

## **Examples of Using Mass Update**

As stated in Mass Updating Tasks, Time, and Expense Entries, the Mass Update command is a very powerful one. In this section we now present some examples of using the Mass Update command, to give you an idea of how useful the command can be.

**NOTE:** In these examples, it is assumed that you have the necessary access rights to perform the mass updates.

## Example—Marking Expense Entries as Billable

**Scenario:** While working on the Pre-Contract phase of the xDB Processor project (where "Pre-Contract" and "xDB Processor" are examples of phases and projects), you had incurred some expenses between 1-July-07 and 15-July-07 and had added the relevant expense entries to your Expense sheet. You now realize that those entries are all Billable and so would like to mark them as such.

**NOTE:** Since task elements and expense entry statuses are user-defined elements, each organization may have its own items. However, whatever you may call the items, the steps to be followed will be the same as described here.

**Solution:** To mark the expense entries between two dates as Billable:

- 1. Click on Mass Update... in the View Sheets tab, to open the Mass Update screen.
- 2. In the Elements panel, click on the button in the Employee row and select your name.
- 3. In the Project row, click on the button and select xDB Processor.
- 4. In the Phase row, click on the button and select Pre-Contract.
- 5. In the Time/Expense Entries panel, check Modify expense entries.

When you check Modify expense entries, the rest of the elements in the panel will become visible.

- 6. Using the Date Picker, set the From field to 1-July-07.
- 7. Using the Date Picker, set the To field to 15-July-07.
- 8. In the Billable row, select Checked from the Set as drop-down list.

## Example—Marking Time Entries as Overtime

**Scenario:** It has been decided to pay overtime rates for all the QA Testing work carried out on the Greenlite Help Desk project between 1-July-07 and 15-July-07.

**NOTE:** Since task elements and expense entry statuses are user-defined elements, each organization may have its own items. However, whatever you may call the items, the steps to be followed will be the same as described here.

Solution: To mark the time entries between two dates as Overtime:

- 1. Click on Mass Update... in the View Sheets tab, to open the Mass Update screen.
- 2. In the Elements panel, click on the button in the Project row and select Greenlite Help Desk (where "Greenlite Help Desk" is an example of a project).
- 3. In the Phase row, click on the button and select Quality Assurance Testing.
- 4. In the Time/Expense Entries panel, check Modify time entries.

When you check Modify time entries, the rest of the elements in the panel will become visible.

- 5. Using the Date Picker, set the From field to 1-July-07.
- 6. Using the Date Picker, set the To field to 15-July-07.
- 7. In the Overtime row, select Checked from the Set as drop-down list.
- 8. Click the **OK** button to update the entries.

## Example—Marking all tasks for a Project as Completed

**Scenario:** The Greenlite Help Desk project has been completed and you would like to mark all the tasks of that project as Completed.

**NOTE:** Since task elements and expense entry statuses are user-defined elements, each organization may have its own items. However, whatever you may call the items, the steps to be followed will be the same as described here.

**Solution:** To change the Task Status:

- 1. Click on Mass Update... in the View Sheets tab, to open the Mass Update screen.
- 2. In the Elements panel, click on the 🔙 button in the Project row and select Greenlite Help Desk (where "Greenlite Help Desk" is an example of a project).
- 3. In the Complete row of the Task Status Fields panel, select Checked from the Set as drop-down list.
- 4. Click the **OK** button to update the entries.

# Reporting

Office Timesheets contains three built-in reporting tools: Summary Reports, Detail Reports and Transaction Detail Report.

Summary Reports is a spreadsheet-style columnar report design and viewing engine. For more details about Office Timesheets Summary Reports please see the online help system within the Office Timesheets application.

Office Timesheets Detail Reports incorporates the Microsoft® Reporting Services runtime whereby report templates can be created using Microsoft's SQL Server Reporting Services and then loaded and saved under a specified Detail Report Category within Office Timesheets.

Transaction Detail Reports is a new reporting tool in Office Timesheets that lets you pull task, time entry and expense entry transactions into an interactive grid. Once tasks, time entries or expense transactions are loaded into the grid, users can sort columns in ascending or descending order and/or group data by one or more selected columns. Data loaded in the grid can also be exported to a spreadsheet.

# **Transaction Detail Reports**

Transaction Detail Reports is a new reporting tool in Office Timesheets that lets you pull task, time entry and expense entry transactions into interactive grid. Once tasks, time entries or expense transactions are loaded into the grid, users can sort columns in ascending or descending order and/or group data by one or more selected columns.

To create a new Transaction Detail Report click on the Reports tab; and then click the new icon on the Transaction Detail Reports icon group...

Sign Out	-				
View Sł	heets +/	Export Rep	orts Process Manageme	ent System Configura	tion
New	Detail Reports	New La	Save The Current Template Display List Of Templates		
Summary Report	Detail Report	Transa	ction Detail Reports		
My Detail Trail	nsactions Report				
Details					
Name					
D Add	h Mara I	le.		Task Elements	
Add		Denne		Employee	{All}
A Rem	ove 🔹 Move I	Down		Personnel	{All}
Edit	Move			Client	{AIB
Euit	IVIOVE			Olon	6. mg

Transaction Detail Reports can be saved as templates and reused at a later time. Thus, it's best when starting to create a new Detail Transaction Report to give your report a name by typing the name into the **Name** field...

New	Detail	Reports No	Save The Current Template		
Summary	Report Detai	Гкероп	Transaction Detail Reports		
🔳 My De	tail Transactions	s Report			
[	)etails				
Nam	e My Detail Tra	insaction Report	×		
	o, = = = = = =			Task Elements	
	Add	Move Up		I ask Elements —	
				Employee	{AII}
	Remove	<ul> <li>Move Down</li> </ul>		Personnel	(AII)
				Classification	[r of
	Edit	Move		Client	{AII}
Sect	ion Task	V		Project	{AII}
0000	. dok	-		Phase	{AII}
Avai	lable Fields		Added Fields	Deliverable	{AII}

At any time you have made important changes to reports **Details** definition, press the **Save The Current Template** icon to save your work...



Any time you wish to recall your Transaction Detail Report click on the **Display List of Templates** icon in the **Transaction Detail Reports** icon group, select the report name, and then press the **Load** icon to recall your report template.

Transa	ction Detail Re	port Template List	×
Load	Close Close Copy Copy Actions		
My Spe Time Er My Deta	nplates cial Report ntries ail Transaction R	eport eport	

To choose the type of transaction you wish to load into your grid report simply click on the **Section** dropdown, and choose between **Task**, **Time Entry** or **Expense Entry**...

View Sr	neets import / Export	Reports Process Manager	ment System Configurat	ion
New	Detail Reports	Save The Current Template		
Summary Report	Detail Report	Transaction Detail Reports		
My Detail Tran	nsactions Report			
Name My I	Detail Transaction Report			
			- Task Elements -	
Add	A Move Up		Employee	{AII}
X Rem	ove 💌 Move Down		Personnel Classification	{AII}
Edit	Move		Client	{AII}
Section	Task Time Entry		Project	{All}
	Expense Entry		Phase	{All}

Once you've chosen the type of transactions you'd like to load into your report grid, next choose which fields you wish to display in your report grid, and the order in which you wish to display them. In the example below we have chosen Time Entry transaction and are showing the Entry Date, Time Spent, the Employee's Display Name, and element levels 1-3...

Summary R	eport Detail Report	Transaction Deta	ail Reports		
Deta My Deta	etails etails My Detail Transaction Repor	1			
×	Add Move Up Remove Move Dow Edit Move			Task Elements — Employee Personnel Classification Client Project	{AII} {AII} {AII}
Section Avail EMP_ ELEN ELEN ELEN ELEN	able Fields DISPLAY_NAME TENT_EX_ID-1 MENT_EX_ID-2 MENT_EX_ID-3 MENT_EX_ID-4 MENT_EX_ID-5	Added Fields	AME LVL-1 LVL-2 LVL-3	Phase Deliverable Entries From 06/09/2014	{AII} {AII}

NOTE: The Transaction Detail Report field is comprehensive, and includes practically every field linked to task, time entry and expense entry transactions. A key is included that lists all fields available for selection along with a brief description of each field.

### **Task Filtering Options**

You can filter your Detail Transaction Report by Task Element item and group selections; and whether or not you wish to show task that do not have time entries are only show tasks that do have time entries within the selected date range of the report...

	Task Elements					
	Employee	{All}				
	Personnel Classification	{All}				
	Client	{All}				
	Project	{AII}				
	Phase	{All}				
	Deliverable	{All}				
ĭ	Tasks					
	Tasks that do not have entries					
	Tasks that have entries					

## **Entry Filtering Options**

You can also filter your Detail Transaction Report by Date (From and To), Task Status fields and Entry Status fields...

Entries				
Task Status Fields		Entry Status Fields		
Complete	Ignore 🗸	Billable	Ignore V	
Billable	Ignore 🗸	Overtime	Ignore 🗸	
		Approval status	Ignore	~

Once you have chosen your filter options simply press the Load/Refresh button to load the transactions into the grid. You would also press this button if you've previously load transactions into the grid, but have changed the filtering options, and you want the transactions in the grid to be updated with your new settings...

Section	Enuy 🗸			-	
Available Fields		Added Fields		Phase Deliverable	
SKIP ADP_COMPANY_ ADP_FILE_NUME ENTRY_DATE START_TIME STOP_TIME TIME_SPENT_OI APPROVAL_STA EMP_EX_ID EMP_DISPLAY_N ELEMENT_EX_ID E	CODE BER NLY TUS VAME -1 -2 -3 -3 -4 -5	ENTRY_DATE TIME_SPENT EMP_DISPLAY_NAME ELEMENT_NAME_LVL- ELEMENT_NAME_LVL- ELEMENT_NAME_LVL-	1 2 3	Entries From 02/01/2014 To 06/30/2014 Task Status F Complete Billable	
Grid Transact	ort				
Load/Refresh	Export				
ELEMENI_EX_ID-3 ELEMENT_EX_ID-4 ELEMENT_EX_ID-5 ELEMENT_EX_ID-5 FI FUMENT_EX_ID-7	~				<u>د ا</u>
Grid Transactions Report					
Load/Refresh Export					
Drag a column header here to g	roup by that column.				
ENTRY_DATE	TIME_SPENT	EMP_DISPLAY_NAME	ELEMENT_NAME_LVL-1	ELEMENT_NAME_LVL-2	ELEMENT_NAME_LVL-3
05/13/2014	5.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group PROJECT 3
05/13/2014	1.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group OFFSHORE CONTRACT
05/13/2014	2.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group OFFSHORE CONTRACT
05/14/2014	3.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group OFFSHORE CONTRACT
05/15/2014	3.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group OFFSHORE CONTRACT
05/16/2014	3.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group OFFSHORE CONTRACT
05/16/2014	3.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group PROJECT 3
05/15/2014	3.00	Amy Rogers	Contract Specialist	Strategic Planning Financial	Group PROJECT 3

Once your transactions have loaded there are several other options you can apply within the grid. To further customize your report and make it your own, you can easily rename an column so that it will display the column header you want. To do this simply hover over the selected column, and you'll the "Rename column" appear...click on the "Rename column text and the Rename Column dialog box will appear...

		-		_
E	٢	ELEMENT_NAT L-1 Rename column	ELEMENT_NAME_LVL-2	ELEMEN
		Contract Specialist	Strategic Planning Financial Group	PROJECT

Type in the name into the New name column, and press the OK icon...



The column will now appear with your new column heading name.

# NOTE: Be sure to click the "Save the Current Template at the top of your screen to save any new settings you've made to the template, including new column names.

To sort a selected column in ascending or descending order hover your mouse above the directional arrow icon in the top left corner of the selected column, and click on it...

Ð	EMP_DISPLAY_NAME	Ð	ELEMENT_NAME_LVL-1	e	Client	C	ELEMENT_NAME_LVL-3	Ð
	Amy Rogers		Contract Specialist	-	Strategic Pla	nning Financial Group	PROJECT 3	
	Amy Rogers		Contract Specialist		Strategic Pla	nning Financial Group	OFFSHORE CONTRACT	

To group your transactions, hover your mouse above a selected column's header name, while holding down your left mouse key, drag the column heading into the blue space above the column heading row and release the mouse the button...

Grid Transactions Report					
Load/Refresh Export					
Client					_
ENTRY_DATE	TIME_SPENT	€	EMP_DISPLAY_NAME	0	ELEMENT_NAM
😑 Client: Strategic Planning Financ	ial Group				
05/12/2014	4.00		Amy Rogers		Contract Special
05/13/2014	5.00		Amy Rogers		Contract Special
05/13/2014	1.00		Amy Rogers		Contract Special
05/13/2014	2.00		Amy Rogers		Contract Special
05/14/2014	3.00		Amy Rogers		Contract Special
05/14/2014	3.00		Amy Rogers		Contract Special
05/14/2014	2.00		Amy Rogers		Contract Special
05/15/2014	3.00		Amy Rogers		Contract Special

At the bottom of the grid panel are several additional controls. The first is a preference settings that allow you set the number of records you'd like to display per page loaded grid page; the other controls allow you to toggle from page to page, assuming there is more than one page worth of data loaded into grid report.

Records per page: 25	43.01			Show Filter - Record	s: 1 - 18 of 18 - Pages: 100 00 1 30 301
	7.01				
05/12/2014	1.00	Amy Rogers	Contract Specialist	XYZ Client	PROJECT 3
00/10/2017	2.00	Any Rogers	Document control coordinator	ALC GIGHT	TROJECT 2

Also, any time you wish to view your report, but don't want your report options visible you can simply hide the report options by clicking on the -/+. This will collapse the report options view, and give you more screen real estate to work with while viewing the contents of your grid report.



#### Exporting your grid data

Office Timesheets also includes the option to export the data from your Transaction Detail Report Grid to a spreadsheet. Once you've loaded data into your detail transaction report grid simply click on the **Export** button, and you'll see options to **Open** or **Save** the report in a spreadsheet format.



## **Transaction Detail Report Field List Key**

Field Name	Description
ADP_COMPANY_CODE	ADP Company Code
ADP_FILE_NUMBER	ADP File Number
ENTRY_DATE	Date of Time Entry
START_TIME	Start Time of Time Entry (if entered)
STOP_TIME	Stop Time of Time Entry (if entered)
TIME_SPENT	Time Spent
TIME_SPENT_ONLY	Time Spent Only (if not start and stop time)
APPROVAL_STATUS	Approval Status of Time Entry
EMP_EX_ID	External ID for Employee (if entered)
EMP_DISPLAY_NAME	Employee's Display Name
ELEMENT_EX_ID-1	External ID Number for Element 1
Repeats forELEMENT_EX_ID-2-10	External ID Number for Elements 2-10
ELEMENT_NAME_LVL-1	Element Level 1 Name
ELEMENT_NAME_LVL-2	Element Level 2 Name
ELEMENT_NAME_LVL-3	Element Level 3 Name
ELEMENT_NAME_LVL-4	Element Level 4 Name
ELEMENT_NAME_LVL-5	Element Level 5 Name
ELEMENT_NAME_LVL-6	Element Level 6 Name
ELEMENT_NAME_LVL-7	Element Level 7 Name
ELEMENT_NAME_LVL-8	Element Level 8 Name
ELEMENT_NAME_LVL-9	Element Level 9 Name
ELEMENT_NAME_LVL-10	Element Level 10 Name
ELEMENT_ABB_LVL-1	Element Level 1 Abbreviation
ELEMENT_ABB_LVL-2	Element Level 2 Abbreviation
ELEMENT_ABB_LVL-3	Element Level 3 Abbreviation
ELEMENT_ABB_LVL-4	Element Level 4 Abbreviation
ELEMENT_ABB_LVL-5	Element Level 5 Abbreviation
ELEMENT_ABB_LVL-6	Element Level 6 Abbreviation
ELEMENT_ABB_LVL-7	Element Level 7 Abbreviation
ELEMENT_ABB_LVL-8	Element Level 8 Abbreviation
ELEMENT_ABB_LVL-9	Element Level 9 Abbreviation
ELEMENT_ABB_LVL-10	Element Level 10 Abbreviation
EXPENSE_EX_ID	Expense's External ID
EXPENSE_NAME	Name of Expense
ENTRY_STATUS-1	Time Entry Status 1
Repeats for ENTRY_STATUS-2-15	Time Entry Status 2-15
ENTRY_NOTES	Time Entry Notes
DESCRIPTION	Expense's Description
PRICE	Expense's Price
QUANTITY	Expense Entries Quantity
---------------------------------	---
TOTAL	Pre-Tax and Markup/Markdown Total
MARK_PERCENT	Markup/Markdown Percentage
MARK_TOTAL	Total Markup/Markdown
TAX_PERCENT	Tax Percentage
TAX_TOTAL	Total Amount of Tax
APPLY_TAX	Apply Tax to Markup/Markdown
ENTRY_TOTAL	Expense Total after Taxes and Markup/Markdown
TRACK_RATE-1	Task Tracking Rate 1
TRACK_HOURS-1	Task Tracking Hours 1
TRACK_RATE-2	Task Tracking Rate 2
TRACK_HOURS-2	Task Tracking Hours 2
TRACK_RATE-3	Task Tracking Rate 3
TRACK_HOURS-3	Task Tracking Hours 3
TASK_NOTES	Task Notes
FIRST_NAME	Employee's First Name
МІ	Employee's Middle Initial
LAST_NAME	Employee's Last Name
EMPLOYEE_EMAIL	Employee's Email Address
EMPLOYEE_MANAGER	Employee's Manager
EMPLOYEE_STATUS	Employee's Status
REPORTING_PERIOD	Employee's Reporting Period
HOLIDAY_GRP	Employee's Holiday Group
TIME_ENTRY_LOCK_DATE	Employee's Time Entry Lock Date
EXPENSE_ENTRY_LOCK_DATE	Employee's Expense Entry Lock Date
EX_ID	Employee's External ID
APPROVAL_START	Employee's Approval Start Date
EMPLOYEE_GRP-1	Employee's Group 1
Repeats for EMPLOYEE_GRP-2-25	Employee's Group 2-25
STD_RATE_TAB_A-1	Employee's Standard Rate Tab A1 (Where A1 is the most current effective rate)
OVT_RATE_TAB_A-1	Employee's Overtime Rate Tab A1 (Where A1 is the most current effective rate)
EFF_DATE_TAB_A-1	Effective Date of Tab A1 Rate (Where A1 is the most current effective rate)
Repeats for STD_RATE_TAB_A-2-10	Employee's Standard Rate Tab A2-10
Repeats for OVT_RATE_TAB_A-2-10	Employee's Overtime Rate Tab A2-10
Repeats for EFF_ATE_TAB_A-2-10	Effective Date of Tab A2-10 Rate
Repeats for Tabs B - E	
EMP_CUSTOM-1	Employee's Custom Field #1
Repeats for EMP_CUSTOM-2-10	Employee's Custom Fields #2-10
TASK_RATE	Task's Rate
TASK_STATUS-1	Task Status 1
Repeats forTASK_STATUS-2-10	Task Status 2-10

START_DATE	Task's Start Date
END_DATE	Task's End Date
LVL1_ELEMENT_STATUS	Status of Element Level 1
LVL1_ELEMENT_GRP-1	Element Level 1 Group 1
Repeats for LVL1_ELEMENT_GRP-2-25	Element Level 1 Group 2-25
LVL1_EX_GRP_ID-1	Level 1 External ID for Group 1
Repeats for LVL1_EX_GRP_ID-2-25	Level 1 External ID for Group 2-25
LVL1_ELM_CUSTOM-1	Level 1 Custom Field 1
Repeats for LVL1_ELM_CUSTOM-2-10	Level 1 Custom Field 2-10
LVL2_ELEMENT_STATUS	Status of Element Level 2
LVL2_ELEMENT_GRP-1	Element Level 2 Group 1
Repeats for LVL2_ELEMENT_GRP-2-25	Element Level 2 Group 2-25
LVL2_EX_GRP_ID-1	Element Level 2 Group 1 External ID
Repeats for LVL2_EX_GRP_ID-2-25	Element Level 2 Group 2-25 External ID
LVL2_ELM_CUSTOM-1	Level 2 Custom Field 1
Repeats for LVL2_ELM_CUSTOM-2-10	Level 2 Custom Field 2-10
LVL3_ELEMENT_STATUS	Status of Element Level 3
LVL3_ELEMENT_GRP-1	Element Level 3 Group 1
Repeats for LVL3_ELEMENT_GRP-2-25	Element Level 3 Group 2-25
LVL3_EX_GRP_ID-1	Element Level 3 Group 1 External ID
Repeats for LVL3_EX_GRP_ID-2-25	Element Level 3 Group 2-25 External ID
LVL3_ELM_CUSTOM-1	Level 3 Custom Field 1
Repeats for LVL3_ELM_CUSTOM-2-10	Level 3 Custom Field 2-10
LVL4_ELEMENT_STATUS	Status of Element Level 4
LVL4_ELEMENT_GRP-1	Element Level 4 Group 1
Repeats for LVL4_ELEMENT_GRP-2-25	Element Level 4 Group 2-25
LVL4_EX_GRP_ID-1	Element Level 4 Group 1 External ID
Repeats for LVL4_EX_GRP_ID-2-25	Element Level 4 Group 2-25 External ID
LVL4_ELM_CUSTOM-1	Level 4 Custom Field 1
Repeats for LVL4_ELM_CUSTOM-2-10	Level 4 Custom Field 2-10
LVL5_ELEMENT_STATUS	Status of Element Level 5
LVL5_ELEMENT_GRP-1	Element Level 5 Group 1
Repeats for LVL5_ELEMENT_GRP-2-25	Element Level 5 Group 2-25
LVL5_EX_GRP_ID-1	Element Level 5 Group 1 External ID
Repeats for LVL5_EX_GRP_ID-2-25	Element Level 5 Group 2-25 External ID
LVL5_ELM_CUSTOM-1	Level 5 Custom Field 1
Repeats for LVL5_ELM_CUSTOM-2-10	Level 5 Custom Field 2-10
LVL6_ELEMENT_STATUS	Status of Element Level 6
LVL6_ELEMENT_GRP-1	Element Level 6 Group 1
Repeats for LVL6_ELEMENT_GRP-2-25	Element Level 6 Group 2-25
LVL6_EX_GRP_ID-1	Element Level 6 Group 1 External ID

Repeats for LVL6_EX_GRP_ID-2-25	Element Level 6 Group 2-25 External ID
LVL6_ELM_CUSTOM-1	Level 6 Custom Field 1
Repeats for LVL6_ELM_CUSTOM-2-10	Level 6 Custom Field 2-10
LVL7_ELEMENT_STATUS	Status of Element Level 7
LVL7_ELEMENT_GRP-1	Element Level 7 Group 1
Repeats for LVL7_ELEMENT_GRP-2-25	Element Level 7 Group 1
LVL7_EX_GRP_ID-1	Element Level 7 Group 1
Repeats for LVL7_EX_GRP_ID-2-25	Element Level 7 Group 2-25 External ID
LVL7_ELM_CUSTOM-1	Level 7 Custom Field 1
Repeats for LVL7_ELM_CUSTOM-2-10	Level 7 Custom Field 2-10
LVL8_ELEMENT_STATUS	Status of Element Level 8
LVL8_ELEMENT_GRP-1	Element Level 8 Group 1
Repeats for LVL8_ELEMENT_GRP-2-25	Element Level 8 Group 2-25
LVL8_EX_GRP_ID-1	Element Level 8 Group 1 External ID
Repeats for LVL8_EX_GRP_ID-2-25	Element Level 8 Group 2-25 External ID
LVL8_ELM_CUSTOM-1	Level 8 Custom Field 1
Repeats for LVL8_ELM_CUSTOM-2-10	Level 8 Custom Field 2-10
LVL9_ELEMENT_STATUS	Status of Element Level 9
LVL9_ELEMENT_GRP-1	Element Level 9 Group 1
Repeats for LVL9_ELEMENT_GRP-2-25	Element Level 9 Group 1
LVL9_EX_GRP_ID-1	Element Level 9 Group 1
Repeats for LVL9_EX_GRP_ID-2-25	Element Level 9 Group 2-25 External ID
LVL9_ELM_CUSTOM-1	Level 9 Custom Field 1
Repeats for LVL9_ELM_CUSTOM-2-10	Level 9 Custom Field 2-10
LVL10_ELEMENT_STATUS	Status of Element Level 10
LVL10_ELEMENT_GRP-1	Element Level 10 Group 1
Repeats for LVL10_ELEMENT_GRP-2-	
25	Element Level 10 Group 2-25
LVL10_EX_GRP_ID-1	Element Level 10 Group 1 External ID
Repeats for LVL10_EX_GRP_ID-2-25	Element Level 10 Group 2-25 External ID
LVL10_ELM_CUSIOM-1 Repeats for IVI 10_ELM_CUSTOM 2	Level 10 Custom Field 1
10	Level 10 Custom Field 2-10

## **Detail Reports**

Currently, Office Timesheets includes more than 80 pre-made Detail Report templates. However, because Office Timesheets is highly configurable, organizations using Office Timesheets may want to create their own unique reports, invoices, digital dashboards, etc.

Lookout Software has incorporated the Microsoft Reporting Services runtime into Office Timesheets because Microsoft SQL Server is the database platform used store and manage its data, and Microsoft Reporting Services is the standard reporting tool that is shipped with Microsoft SQL Server. Thus, most organizations using Office Timesheets are likely to already have Microsoft SQL Server licenses and are already familiar with using Microsoft Reporting Services for designing reports and analyzing data held in SQL Server databases.

While the Microsoft Reporting Services runtime is incorporated in Office Timesheets, it does not contain the necessary applications and/or tools for designing the actual report templates. Office Timesheets merely incorporates Microsoft's freely distributable runtime which is only designed to store and retrieve reports generated from data within the Office Timesheets database. The tools required to build Office Timesheets detail reports are those included in Microsoft's Reporting Services. These tools are included as components of Microsoft SQL Server and/or Microsoft Visual Studio 2005 or higher.

Only the person/s designing the report/s needs a license for Microsoft Reporting Services. Once the report template is created and loaded within Office Timesheets it can be generated with live Office Timesheets data by any Office Timesheets user that has been granted rights to view Detail Reports.

## Using Office Timesheets Detail Reports

#### Viewing a detail report

Retrieving and viewing detail reports within Office Timesheets is quite simple. To navigate to Office Timesheets Detail Reports:

- 1. Click on the on the **Reports** tab.
- 2. Click on the **Detail Reports** icon in the **Detail Reports** ribbon group.

The Detail Report List will appear...



**NOTE:** If you are using Detail Reports for the first time, your Detail Report List may appear blank. If so, you'll need to add the default report templates to your list. To add the default report templates to your detail report list:

1. Click the **Add Defaults** button...the **Add Default Reports** dialog box will appear.

2. Click on the **Select All** icon in the **Selection** ribbon group from within the **Add Default Reports** dialog box; then click **OK** in the **Actions** ribbon group.

Add default report templates shipped with Office Timesheets should now be visible within the Detail Reports List.

#### **Browsing Detail Report Categories**

Office Timesheets detail report templates are organized under seven (7) report categories:

- Employees
- Groups
- Elements
- Time Entries
- Expense Entries
- Auditing
- Miscellaneous
- Time & Expense Entries

To see reports listed in a particular category, simply click on the **Category** drop down field; and then select the category of reports in which you wish to view...

Detail Re	eport List					
Report list     If this is your first time using Detail Reports     defined detail report templates to your Offic						
List. To do boxes in th	this, click the "Add e "Add Default Rep	Defaults" but orts" dialog l				
Category	Employees -					
Employee I Employee S Employee C Employee F Employee I	Employees Groups Elements Time Entries Expense Entries					
	Auditing Miscellaneous					

#### Loading & Setting the Reports View Criteria

There are two things that you must do before viewing detail reports within Office Timesheets: load the report and set the report's viewing criteria.

First, you must "load" a selected report. To do this, simply highlight the report shown within a report category you wish to load, and click the Load button...you'll now see the selected report's title across the titled bar (highlighted in the image below). You'll also notice that once a report has been loaded that the new ribbon groups and functions have appear(Print and Report Options ribbon groups).

Sign Out 👻							
View Shee	ts Import /	Export	Rep	orts	Proces	s Management	Sys
Print Active View	Recalculate	View Crite	eria		Σ New	Detail Reports	
Print	Report	Options		Sumn	nary Report	Detail Report	
Time Entries by E	mployee						

Now that the report is loaded, you must set the View Criteria. The View Criteria is a set of functions that allows you to choose what data is relevant to the report. To set the loaded report's View Criteria, click on the View Criteria icon in the Report Options ribbon group...

OK       Cancel       Status         Actions       Status         Employee       {AII}         Client/Cost Center       {AII}         Project/Job       {AII}         Phase       {AII}         Sub-Task/Activity       {AII}				
ActionsStatusEmployee{AII}Client/Cost Center{AII}Project/Job{AII}Phase{AII}Sub-Task/Activity{AII}				
Employee{All}Client/Cost Center{All}Project/Job{All}Phase{All}Sub-Task/Activity{All}				
Client/Cost Center     {All}       Project/Job     {All}       Phase     {All}       Sub-Task/Activity     {All}				
Project/Job     {All}       Phase     {All}       Sub-Task/Activity     {All}				
Phase     {AII}       Sub-Task/Activity     {AII}				
Sub-Task/Activity {All}				
From date 0 First of month Ago				
To date 0 Days Ago				
ų				

The Reports View Criteria allows you to filter reports based on:

- Time Entries Statuses
- Task Statuses
- Element Level Items

- Elements Level Groups
- From date
- To date

In the example below, we only want to see report data for the for a specific employee group (Engineering Development); where time is billable; and for the entire year in 2007...



#### Using the "Recalculate" Function

Once you set the desired view criteria for a specified report simply click on the Recalculate button in the Report Options ribbon group to generate your report...

Sign Out 🕫							
View Shee	ets Import	/ Export	Reports	Proces	ss Management	System Configuration	
Print Active View Recalculate View Criteria New Detail Reports							
Print	Print Report Options Summary Report Detail Report						
Time Entries by E	Time Entries by Entroyee						
I         1         of 1         ▷ I         100%         ▼         Find   Next         Select a format         ▼ Exp							
Time Entries by Employee							
Date Range: 01/01/2007 to 12/31/2007							
						02/04/2008	
Employee							
Entry Date	Entry Date Element Levels Hours						
Anderson A. Lloy	Anderson A. Lloyd						
05/14/200	7 And	derson A. Llo	yd, Addi	son Labs, I	nc., AccountSt	ar, 8.00	
05/15/200	7 Ån/	doreon A. Llo	vd_Addi	con Lobe I		ar <u>8.00</u>	

Each time a report is loaded, the View Criteria settings must specified, and the Recalculate icon must be clicked in order to render the report.

#### **Renaming Detail Reports**

Office Timesheets customers will likely want to rename many of the standard Detail Report templates in Office Timesheets. In this example, the customer has created their own unique element level hierarchy where the first Element Level (Element Level 1) is named "Client/Cost Center". Thus, in this example, the customer wants to change the name of the report "Time Entries by Element Level 1" to Time Entries by Client/Cost Center...

Sign Ou	ut ≑							
View Sheets Import / Export Reports Process Manag								
New	Detail Reports							
Summary Report	Summary Report Detail Report							
Detail Report List								
Report list If this is your first time using Detail Reports you will need to add the pre- defined detail report templates to your Office Timesheets Detail Report List. To do this, click the "Add Defaults" button below; select all check boxes in the "Add Default Reports" dialog box; and click OK. Category Time ries								
Time Entries	mployee		<u> </u>	Add Defaults				
Time Entries by	Element Level 2			Rename				

To rename a detail report template in Office Timesheets:

- 1. Click on the **Reports** tab; then click on the **Detail Reports** icon in the **Detail Report** ribbon group.
- 2. Highlight report in which you want to rename by clicking on it with your mouse; and click the **Rename** button.
- 3. From the **Rename Template** dialog box, type in the desired name for the specified report template; and click **OK**.

Rename Template X					
Actions					
Name					
Time Entries by Client/Cost Center					

#### **Adding Detail Reports**

Once you have created a detail report template using Microsoft Reporting Services, it can then be added into the Office Timesheets detail report list.

To add a detail report template:

1. Click on the Reports tab; then click on the **Detail Reports** icon in the **Detail Report** ribbon group.

2. From the Detail Report List screen click the **Add Report** button.

#### Add Report

From the Add Report dialog box, type in the desired name of the report in the Name field; choose the appropriate category in which you want the report to be listed under in the Category drop down selection box; click the Browse button and select the location of the report template; and click Save & Close (if you are adding only one report) or click the Save & New button (if you wish to add additional reports).

Add Repo	rt	x
Save & Clo	Save & New Cancel se	
	Actions	
Name		
Budget Ana	alysis Report	
Category	Time Entries -	_
s\Report T	emplates\BudgetAnalysis.rdlc Browse	

#### **Copying Detail Reports**

Once you added additional Detail Report templates into Office Timesheets, you can copy the template to other users within Office Timesheets.

To copy a Detail Report template to one or more Office Timesheets users:

- 1. Click on the Reports tab; then click on the **Detail Reports** icon in the **Detail Report** ribbon group.
- 2. From the Detail Report List screen click the **Copy...** button.



3. From the **Copy Report Templates** dialog box select the employee/s you wish to copy **Detail Report Templates** to by clicking on the **Employees** selection list button; select the **Copy all templates** checkbox; and click **OK**.

Copy Report Templates 🗙				
<ul> <li>×</li> </ul>				
OK Cancel Actions				
Employees				
Anderson A Brian				
Replace existing templates				
Copy all templates				

**Replacing existing template:** If you wish to replace an Employees Template list with your template list, choose the **Replace existing templates** checkbox instead of the **Copy all templates** checkbox.

#### **Tutorials for Creating Your Own Detail Reports**

Detail Reports within Office Timesheets are generated from report templates that have been created using Microsoft's Reporting Services applications and tools. There are many free and paid resources available to those wanting to learn how to develop and/or design reports using Microsoft Reporting Services. A full range of step-by-step tutorials on Microsoft Reporting Services are offered free by Microsoft at <a href="http://msdn2.microsoft.com/en-us/library/ms170246.aspx">http://msdn2.microsoft.com/en-us/library/ms170246.aspx</a>.

#### The Detail Reports Resource Kit

If you are interested in creating your own Detail Report Templates for Office Timesheets you may also request the Office Timesheets Detail Reports Resource Kit (DRRK). The DRRK includes video tutorials on how develop detail reports for Office Timesheets as well as the Office Timesheets database schema. The DRRK is available by request via the support ticketing system at

http://www.officetimesheets.com/support/crmlogin.aspx. If you request the DRRK, and are not an existing Office Timesheets customer you will be asked to sign/execute a non-disclosure agreement as the guide contain confidential and proprietary information about Office Timesheets.

## Have the Office Timesheet Professional Services team create custom Detail Report template/s for your organization

Apart from specialized training and consulting services, the Office Timesheets Professional Services team can create custom Detail Report templates to your specification. Our professional services team has a lot of experience creating customized reports and can turn most reports around in relatively quickly. If your organization is interested in having our team develop one or more custom Detail Report templates to your specification please contact our sales team at **214-239-1985** or <u>sales@officetimesheets.com</u> to for a price quotation.

### **Summary Reports**

Office Timesheets includes two different tools for generating reports from your timesheet data: Summary Reports and Detail Reports. The Summary Report tool queries data from employee time entries and displays the data in defined columns; and calculations can be performed within and/or between defined columns. Any summary report that is created can be saved as a template and reused in the future. Further, once summary report is generated, it can saved as CSV file, which enables users to further manipulate the report data in applications such as Microsoft® Excel®.

As the name implies, Summary Report are great for summarizing timesheet and task data held within the Office Timesheets database. Common uses for summary reports include comparing actual time spent vs. time budgeted for projects and/or tasks; employee costs vs. employee overhead by project, task and/or client; etc.

#### **Creating a Summary Report**

Summary Reports are both quick and easy to create. To create a summary report:

1. Click on the "Reports" tab.



2. Click on the "New" button within the "Summary Report" ribbon group.



3. On the first column located on the far left side double click on the blank field above the column to open the "Define Column" dialog box.

Sign Out =					
View Sheets Import	/Export	Reports	Process Ma	anagement	Syste
Print Active View Recalculate	View Criteria	a New	Save	The Current ay List Of Te	Template mplates
Print Repo	rt Options		Summar	y Report	
Summary Report					
Export	<u>*</u>				
	<	1111			

4. Enter in a title for the first column. This name will appear within what used to be the blank field above the column in step 3.

Sign Out =		
View Sheets Import / Export Reports	Define column	×
Print Active View Print Report Options	OK Cancel Delete Duplicate Dates Actions	
Summary Report	Title	
	Time Entry	
Export	Operator Field Function Constant From To	
	4 Calculate column total Calculate entries separately	

5. Choose the desired "Field" and "Function" from the drop down menu.

	None	STREET, STREET					
Sur	Time spent	tail Report	1.2				
	Task rate						
-1	Standard Amount: Tab A	- P		- 21	- P	1	
	Overtime Amount: Tab A						
	Standard Amount: Tab B						
	Overtime Amount: Tab B		14		S.		
	Standard Amount: Tab C				l l		
	Overtime Amount: Tab C						
	Standard Amount: Tab D						
	Overtime Amount: Tab D	<u> 10</u>					- 220
Define c	Standard Amount: Tab E	-					
Donne o	Overtime Amount: Tab E						
	Expense cost						
1	Expenses						
	Constant						
OK	Column	ates					
	Column total						
	Budget rate						
Title	Est to complete rate						
	Budget hours						
Time Entry	Cost hours						
L	Est to complete hours						
Operator	Budget amount	Function	Constant F	rom	То		
	Dudgot uniount	runcuon	Constant 1	rom	10		
operator	Cost amount						

6. Choose the corresponding "From" and "To" dates by selecting the "Select dates" button.

Define c	olumn				x
ок	Cancel Delete Dupl	icate Dates			
Title					_
Time Entr	y				
Operator — 1 —	Field	Function Con	stant From	То	
	Time spent	🔽 Total 🔽	Select date	Select date Status	3
2			, v	a.	
~	None	~			
3					
~	None	~			
4					
~	None	~			
Calcula	ate column total				
Calcula	ate entries separately				



7. To further filter your selection click on the "Status" button and choose the corresponding "Entries" and or "Tasks" statuses.

Define c	column x
ок	Cancel Delete Duplicate Dates
Title	
Time Entry	у
Operator	Field Function Constant From To
	Time spent 🔽 Total 👻 Select date Status
2	None 💌
3-	None
4	
~	None
Calcula	ate column total ate entries separately

V X			
OK Cancel			
Actions			
Entries		Tasks	
Billable	Ignore 🖌	Complete	Ignore 🗸
Overtime	Ignore Checked	Billable	Ignore 🔽
Approval status	Unchecked	<b>v</b>	NI

8. If this column requires only one dedicated field click on the **OK** button to save the settings and skip to step 10.

Define	column	x
ок	Cancel Delete Duplicate Dates	
Title		
Time Entr	try	
Operator	Field Function Constant From To	
	Time spent V Total V Select date Select date	e Status
2		
~	None 💌	
3		
~	None	
4		
· ·	None	
Calcul	late column total	

a. If this column requires more than one field then select the appropriate binary operator from the drop down menu (+ - \* / %).

~							
ок	Cancel De	lete Duplicate	Dates				
Title		112	2				
Time Entry							
perator	Field		Function	Constant Fr	om	То	
	Time spent	8	🖌 Total 🗸		Select date	Select date	Status
2							
~	None						
+							
- h	None		/				
1 %							
~	None						
			- 1				

b. Again choose the desired "Field" and "Function" from the drop down menu.

	Time spent	
	Task rate	etall Report
	Standard Amount: Tab A	
	Overtime Amount: Tab A	- 1/4 /1/ /1/ /1/ /1/ /1/ /1/
	Standard Amount: Tab B	
20 B	Standard Amount: Tab C	
	Quertime Amount: Tab C	
Define co	Standard Amount: Tab D	X
1	Overtime Amount: Tab D	
1	Standard Amount: Tab F	
	Overtime Amount: Tab E	
OK	Expense cost	ates
	Expenses	0.00
	Constant	
Title	Column	
The	Column total	
Time Entry	Budget rate	
	Cost rate	
Operator	Est. to complete rate	Function Constant From To
Operator	Cost hours	Tunction Constant From To
1	Est to complete hours	
	Budget amount	Total Select date Select date Status
	Cost amount	
	Est. to complete amount	
2-	[Client] client rate	
Car Card	Alexan	

c. Choose the corresponding "From" and "To" dates by selecting the "Select dates" button. When finished click on the **OK** button to save the settings and continue with step 10.

Define	column		X
ок	Cancel Dele	te Duplicate Dates	
	Actior	IS	
Title			
Time Entr	y		
Operator	Field	Funct	ction Constant From To
	Time spent	▼ Total	Select date Select date Status
2	Task rate	<b>v</b> Total	Select date Select date Status

d. Check box option: "Calculate column total" - Determines if Office Timesheets displays the column total at the bottom of the column.

Define co	lumn x	
ОК	Cancel Delete Duplicate Dates	
Title -		
Time Entry		
Operator	Field Function Constant From To	
	Time spent V Total V Select date Status	
2	Task rate V Total V Select date Status	
3	None	
4	None	
Calculat	e column total e entries separately	

e. Check box option: "Calculate entries separately" - Mark this check box to change the calculation method for the column. With this method, Office Timesheets will apply each operator to each entry separately, rather than scanning all entries for the first field. Function and date selection items are not viewable for "Field" 2-4.

Define c	column >	c
ок	Cancel Delete Duplicate Dates	
Title		٦
Time Entr	у	
Operator	Field Function Constant From To	
	Time spent     Total     Select date     Status	
2	Task rate	
3	None	
4	None	
Calcula	ate column total ate entries separately	

10. To test your current configuration click on the "Recalculate" button and the Summary Report will generate and display your column's calculations.

Sign Out 🗧			
View Sheets Impor	/Export Reports	Process Management S	ystem Configuration
Print Active View Recalculate	View Criteria	Save The Current Template Display List Of Templates	e Detail Reports
Summary Report	At Options	Summary Report	
	Time Entry *		
Export			
ļ	<		

11. To further filter what will be displayed within the report click on the "View Criteria" button. From the View Criteria dialog box you may choose which Elements displays within the Report.

Import / Export	t Reports	Process Manager	nent System Configuration			
Recalculate Viev	w Criteria	New	Detail Reports			
Report Option	15	View Criteria			x	
Time En	itry *	OK Cancel				
		Elements		Show		
		Employee	{AII}	 Outline view	Show Move Up	
		Client	{AII}	 Employee	Move Down	
		Project	{AII}	 Client		
		Event	{AII}	 Project		
		Activity	{AII}	Event		
		Payroll Item	{AII}	Activity		
		Completed	{AIB	Payroll Item		
				Completed		
		🗌 Include task data w	ithout entries			
<						

a. To make a selection click on the select button located to the left of each field under the "Elements" section. The "Select element" field will appear. You may filter the names by choosing a specific "Group".

Reports     Process Management     System Configuration       a     Save The Current Template     Image: Save The Current Template       a     Display List Of Templates     Image: Save The Current Template	Enc Select element x
View Criteria       View Criteria       View Criteria       OK Cancel       Actions       Elements       Employee       (All)       Client       (All)       Project       (All)       Event       (All)       Activity       (All)       Completed       (All)       Completed	Actions Group P8 (Group) (foroup) (Non group) Daron March
Include task data without entries	Status Active

- b. The "Active" "Status" field only displays those Elements which are Active and Inactive Elements will not be shown. To display Inactive Elements choose the "All" "Status" option.
- c. There are several "Select element" dialog boxes which contains the "Show as" option. Choosing the "Name" options displays the full name of the element whereas the "Abbreviations" will display all names in an abbreviated form.

- d. Within the "View Criteria" dialog you may further filter out what will be displayed within the report by marking/unmarking the "Show" check boxes next to the corresponding Element as seen in step 11. Select the **OK** button to save the changes.
- 12. Save your report.
  - a. If the report only requires one column you must click on the "Save The Current Template" button, create a "Name", and hit **OK** to save your entire report. Failure to do so may result in the loss of settings previously configured. So if you need view information in another tab within Office Timesheets your report template will be saved.

NOTE: If a second column is needed simply double click on the blank field above the column to open the "Define Column" dialog box.

Sign Out =	ts Import/Export Re	norts Process Management Syste	em Configuration	Eric
Print Active View Print	Recalculate View Criteria Report Options	Save The Current Template	Detail Reports	-
Summary Report				
Export	Time Entry *			

b. To retrieve your report template choose the "Display List of Templates" button and select your template.

Sign Out 🗧 View Sheet	is Import / Export Rep	orts Process Management Syste	Eric tem Configuration
Print Active View Print	Recalculate View Criteria Report Options	New Summary Report	Detail Reports
Summary Report			
Export	Time Entry *		

13. If a second column was created, a 3rd column can be configured to display the total of the 1st and 2nd column. To display this total open the 3rd column and choose the "Column" option for both the 1st and 2nd "Fields". The "Constant" field will now appear. For the first "Column" option enter in "1" as this represents the total amount for column 1. Enter in "2" for the second "Column" option as this represents the total amount for column 2. Choose the appropriate binary operator from the drop down menu (+ - \* / %) and hit the **OK** button. Select the "Save the Current Template" button to save the new settings.

Sign Out 🕫	[	Frie	
View Sheets Import.	/Export Reports	Define column	x
Print Active View Recalculate	View Criteria New rt Options	OK Cancel Delete Duplcate Dates	
Summary Report		Title	
	Time Entry * Task Rate *	Total	
		Operator     Field     Function     Constant     From     To       1     column     1.000     2	

14. Choose the "Recalculate" button to generate the new amounts for each column.

Please note: the "Standard Amount: Tab" is the Product of "Time Spent" \* "The rate of the specified tab"

#### The Define Column Dialog in Detail

As previously stated, a total of 100 columns may be defined in an Office Timesheets Summary Report. Each column in a summary report is defined using the **Define column** dialog box. The Define column dialog box is described below...

Deletes sa d Cancels any changes t column dialog info and dialog	aved Define column Function that is performed on the selected field data Allows you to duplicate the previous defined date selections From and To dates in selected field data	r and never nt) n which the is pulled
Commits the selected Define column dialog info and closes the dialog box	Define column	x
	OK Cancel Delete Duplicate Dates	
Field for which ———— data is pulled	Actions	
	Title	
Column title		
Mathematical operator	Operator     Field     Function     Constant     From     To       1     Time spent     Total     Select date     Select date       2     *     Constant     1.2000	Status
	None	Time and task status filter
Gives you a total for the selected column	4	selections
Calculates each time or expense entry seperately	Calculate column total	

#### **Column Title field**

The Title field in the Define column dialog box is allows you describe the data held within a given Summary Report column. Giving a Summary Report column a title is fairly straight forward...simply type in the title of the column in the **Title** field and **OK**.

Title		
Actual Hours		

Sign Out =					
View Sheet:	s Import/	Export	Repo	rts	Pi
Print Active View	Recalculate	View Crite	eria	Ne	E
Print	Report	t Options			
Summary Report					
Export		Actual Hours			
Andrea Paulino		185.00			
AutoLink Engineering,	Plc.	160.00			
Capital IVR		160.00			
5 - Test		160.00			

#### Fields available for selection in Summary Reports

Define co	lumn	x	
ок	Cancel Dejste Duplicate I	Dates	
Title -	ITS		_
Operator	Field	Function Constant From To	
— 1 —			
	Time spent	Total     Select date     Select date     Status	
	None		
2	Time spent		
	Task rate		
-	Standard Amount: Tab A		
	Overtime Amount: Tab A		
3	Standard Amount: Tab B		
	Overtime Amount: Tab B		
-	Standard Amount: Tab C		
	Standard Amount: Tab D		
4	Overtime Amount: Tab D		
	Standard Amount: Tab E		
-	Overtime Amount: Tab F		
	Expense cost		
Calculat	Expenses		
Calculat	Constant		
- ouround	Column		
1	Column total		
	Budget rate		T
	Cost rate		+
	Est. to complete rate		
	Budget hours		
	Cost hours		
	Est. to complete hours		
	Budget amount		
	Cost amount	A.	
	Est. to complete amount	see Ir	nte

The following fields are available for selection in Office Timesheets Summary Reports...

- Time Spent is the total amount of time spent (Duration) for the selected (from View Criteria) row data.
- Task Rate (Task Rate x Entry Duration).

Task				x
Save & Close Ca Actions	ve as Copy ve & New ncel Show			
Task Elements		Task Start and D	ue dates —	
Employee 💌	Anthony Coale	Start Date		
Client (Customer)	BlackRock Manufacturing Partners, Inc.	Due Date		
Project (Job)	Cordova Project	Total and the set of t		
Actvity (Service Item)	1 - Requirements	Task rates and n	ours	
Sub-Activity (Class)	1.1 - Gather Regs	l ask rate	55.00	Get rate
Pay Code (Payroll Iten	BT	Budget	55.00	210.00
		Cost	35.00	210.00
		Est. to Complete	55.00	210.00
		Complete		
		Billable		

- Standard Amount: Tab A (Standard Rate Tab A x Entry Duration).
- Overtime Amount: Tab A (Overtime Rate Tab A x Entry Duration).
- Standard Amount: Tab B (Standard Rate Tab B x Entry Duration).
- Overtime Amount: Tab B (Overtime Rate Tab B x Entry Duration).
- Standard Amount: Tab C (Standard Rate Tab B x Entry Duration).
- Overtime Amount: Tab C (Overtime Rate Tab B x Entry Duration).
- Standard Amount: Tab D (Standard Rate Tab B x Entry Duration).
- Overtime Amount: Tab D (Overtime Rate Tab B x Entry Duration).
- Standard Amount: Tab E (Standard Rate Tab B x Entry Duration).
- Overtime Amount: Tab E (Overtime Rate Tab B x Entry Duration).
- Expense Cost (Price x Quantity).
- Expenses total calculated expense including Markup/down and Tax.
- Constant a user-defined number that does not change.
- Column column number (other than the currently selected column...example: Column "3").
- Column total calculated total for the selected column.
- Budget rate (Budget Rate x Entry Duration).

Save & Close X Cas Actions	ve as Copy ve & New ncel Show	-		
Task Elements		Task Start and D	ue dates	
Employee 👻	Anthony Coale	Start Date		
Client (Customer)	BlackRock Manufacturing Partners, Inc.	Due Date		
Project (Job)	Cordova Project	Task rates and hours		
Activity (Service item)	1 - Requirements	Task rate	55	Get rate
Sub-Activity (Class)	1.1 - Gather Regs	Budget	55.00	210.00
Pay Code (Payroll Item	RI	Cost	35.00	210.00
		Est. to Complete	55.00	210.00
		Complete		
		Billable		

• Cost rate - (Task Rate x Entry Duration).

Task				x
Save & Close Close Actions	ve as Copy ve & New ncel Show			
— Task Elements —			ue dates —	
Employee 💌	Anthony Coale	Start Date		
Client (Customer)	BlackRock Manufacturing Partners, Inc.	Due Date		
Project (Job)	Cordova Project	Taak rates and h		
Actvity (Service Item)	1 - Requirements	Task rates and n	ours	
Sub-Activity (Class)	1.1 - Gather Regs	Task rate	55.0	Get rate
Pay Code (Payroll Iten	RT	Budget	5	210.00
		Cost	35.00	210.00
		Est. to Complete	55.00	210.00
		Status Fields		
		Complete		
		Billable		

• Est. to complete rate - (Est. to complete Rate x Entry Duration).

Task				x
Save & Close Ca Actions	ive as Copy ive & New incel			
		— Task Start and D	)ue dates	
Employee 💌	Anthony Coale	Start Date		
Client (Customer)	BlackRock Manufacturing Partners, Inc.	Due Date		
Project (Job)	Cordova Project			
Actvity (Service Item)	1 - Requirements	I ask rates and r	iours	
Sub-Activity (Class)	1.1 - Gather Regs	Task rate	55.00 Get	rate
Pay Code (Payroll Iten	RT	Budget	55.07 210.0	0
		Cost	3 210.0	0
		Est. to Complete	55.00 210.0	0
		Status Fields		
		Complete		
		Billable		

- Budget hours value entered in **Budget** hours field.
- Cost hours value entered in **Cost** hours field.
- Est. to complete hours value entered in Est. to Complete hours field.
- Budget amount (Budget rate x Budget hours).
- Cost amount (Cost rate x Cost hours).
- Est. to complete amount (Est. to complete rate x Est. to complete hours).

#### Functions available for selection in Summary Reports

The following functions are available for selection in Office Timesheets Summary Reports...

	<b>(</b>	
Operator	Field	Function
	Time spent	Total V
2		Max
*	Constant	Min Avg >=
3		<=

- **Total** the total of all values for the selected field.
- Max the maximum value of all values for selected field.
- Min the minimum value of all values for selected field.
- **Avg** the average value for the selected field.
- >= total values that are greater than or equal to the constant value in which you input.
- <= total values that are less than or equal to the constant value in which you input.

#### From and To Dates

To the select the date range for which entries will be queried in your column click on the **Select date** button under the **From** and **To** column headers...

From	То
Select date	Select date

Select a date pattern or choose a specified date using the **Use pattern** or **Use date** radio button and date controls...

Select date x
OK Cancel
Actions
◯ Use pattern
Number Period Past / Future
0 Sundays 💌 Ago 💌
Our of the second se
06/01/2011

#### **Status Filter Selection**

Click on the Status button to open the **Status selection** filter dialog box. The Entry and Task statuses you wish to filter your report column by, and click **OK**.

Status			
Status selection			>
OK Cancel			
Entries		Tasks	
Entries Billable	Ignore 💌	Tasks Complete	Ignore 💌
Entries Billable Overtime	Ignore 💌	Complete Billable	Ignore 💌

#### **Operators available for selection in Summary Reports**

The following operators are available for selection in Office Timesheets Summary Reports...



- Add add the value of the current selected field to value of the previously selected field.
- **Subtract** subtracts the value of the previously selected field from the value of the current selected field.
- **Multiply** multiplies the value of the current selected field by value of the previously selected field.
- **Divide** divides the value of the previously selected field by the value of the current selected field.
- **Percentage** percentage of the the value of the previously selected field by the value of the current selected field.

#### Setting the View Criteria for your Summary Report

Office Timesheets allows to further filter items in Summary Report so you can view the precise details you want using the Summary Reports **View Criteria**. To access the Summary Reports View Criteria simply click on the **View Criteria** icon in the **Report Options** ribbon group...



The Summary Report View Criteria dialog is fairly straight forward and easy to use. Below is an illustration of the features and functions offered in the Summary Reports View Criteria dialog:

		Mark the Sh levels you S	When you use the M change th level is now checkbos u want to app ummary Rep	I highlight an Element level love Up and Move Down b e order in which a selected viewed on your Summary f of Element ear on the ort	you can uttons to Element – Report	
	View Criteria					×
Element item	Actions					
	Elements			Show		
	Employee	(All)		Outline view	Show	Move Up
	Client (Customer)	(Group) 2010		Employee		Move Down
	Project (Job)	(All)		Client (Customer)	1	
	Activity (Service Item)	(All)		Project (Job)	<b>V</b>	
	Sub-Activity (Class)	(All)		Actvity (Service Item)	V	
	Pay Code (Payroll	(AD		Sub-Activity (Class)	<b>V</b>	
Select this checkbox if you want data for tasks that do not have time or expense entries to appear in the	Item)	out entries		Pay Code (Payroll Item)		

#### Saving and and/or opening Summary Report Templates

Summary Reports can be saved as templates and re-used on later dates. The topics below describe how to save and open Summary Report Templates.

#### Saving a Summary Report

Any time you create a new Summary report or modify the settings of an existing Summary report you'll want to save the report as a template so that it can be reused at a later date without having to re-define all the reports settings.

To save a Summary report:

- 1. Click Save The Current Template in the Summary Report ribbon group.
- 2. Type in a name for your template in the Name field of the Template Name dialog box; and click OK.

#### **Opening a Summary Report Template**

To open a Summary report template:

- 1. Click on the **Reports** tabs; and then click on the **Summary Reports** icon.
- 2. Click **Display List of Templates** in the **Summary Report** ribbon group.



3. From the **Summary Report Templates** List dialog box select the Report template you wish to open and click the Run icon.

	× Close	
<b>~</b>	X Delete	
Run	Сору	
Acti	ons	

 If you wish to change dates and/or other filter settings click View Criteria in the Report Options ribbon group; change the View Criteria settings as desired; and click Recalculate in the Report Options ribbon group.



#### Copying a Summary Report Template to another user

When you save a Summary Report the template is only saved to your list of templates. However, you can copy any Summary Report template that you create and save to any other Timesheet user.

To copy a Summary Report template to another user:

- 1. Click on the **Reports** tabs; and then click on the **Summary Reports** icon.
- 2. Click **Display List of Templates** in the **Summary Report** ribbon group.



3. From the **Summary Report Templates** List dialog box select the Report template you wish to copy and click **Copy**.

~	X Close	
$\checkmark$	X Delete	
Run	Сору	
ŀ	Actions	

From the **Copy summary report templates** dialog box, select the Employee/s or Employee Groups you wish to copy the template to; and select **OK**.

LIUNE I	1
Copy summary report templates 🛛 🗙	
OK Cancel	
Actions	
Options	
Employees	
{Group} Managers	
Replace existing templates	
Copy all templates	

#### **Exporting Your Summary Report to a Spreadsheet**

Once you've generated a summary report in Office Timesheets you can export it to a spreadsheet file so that it can be further manipulation if needed. To export your Summary Report to a CSV file simply click on the **Export** button in the top left-hand corner of the Summary Report (see image below); and save or open the file with a selected application (example: Microsoft Excel).

Sign Out 🗧					
View Sheets Import /	/ Export	Reports	Process	Managemer	nt Sys
Print Active View Recalculate	View Crite	eria Nev	s 🖳 s	ave The Curre isplay List Of	nt Template Templates
Print Repo	ort Options		Sum	mary Report	
Summary Report					
Export	Actual Hours	Budget Hours	Hours Variance	% to Budget	Labor Cost
Capital IVR	7099.00	30360.00	-23261.00	23.38	391763.0
2 - Planning	225.00	3000.00	-2775.00	7.50	13770.0
2.2 - Determine Resources	90.00	1000.00	-910.00	9.00	5508.0
Amy Rogers	18.00	200.00	-182.00	9.00	1188.0
Opening SummaryReport.csv You have chosen to open SummaryReport.csv which is a: Microsoft Excel Co from: http://los-ocserver4 What should Firefox do with this fil Open with Microsoft Excel Save File Do this <u>a</u> utomatically for file	omma Separa e? el (default) es like this fro	ted Values Fi	le Cancel		

## **Using Generic Import/Export**

The Office Timesheets Import/Export tab contains functions and/or modules designed to transfer data between Office Timesheets and other applications and/or files.

To access Office Timesheets Import/Export tab click on the **Import/Export** tab (shown in the illustration below).



There are currently four ribbon groups found within Office Timesheets' Import/Export tab: **Generic**, **MS Project**, **QuickBooks** and **Active Directory**.

	Sign Ou	t ₹							
9	View S	heets		Import / Export		Reports	Proce	ess Management	System Confi
Import a	/ Export		Save Displ	The Current Templa ay List Of Templates	te	Import / Es	kport	Preferences	Import
		Ge	enerio	•		MS Proj	ect	QuickBooks	Active Directory

- **Generic Import/Export** the **Generic** ribbon group houses all the functions and features within Office Timesheets for importing and/or exporting data from and/or to other applications using comma separated value (CSV) text files. Office Timesheets imports and exports CSV file types because almost all data driven applications can export and/or import this file type as it has long become an industry standard, and this file type is standardized across almost all computer platforms.
- **MS Project** the **MS Project** ribbon group houses all the functions and features within Office Timesheets for bi-directional integration with Microsoft® Project. This set of features and functions are designed to import employee (resource) task assignments from Microsoft Project plans into employee timesheets within Office Timesheets; and export actual hours back to the project plan as often as an update to the project plan is needed.
- **QuickBooks** the **QuickBooks** ribbon group houses the data mapping preferences for users wanting two-way integration with Intuit's QuickBooks® (QuickBooks Professional or higher is required).

Note: you must also download the Office Timesheets QBLink application in order to perform bidirectional integration between Office Timesheets and QuickBooks.

• Active Directory – the Active Directory ribbon group contains the functions necessary for connecting to a Microsoft Windows Domain Controller in order to import name and login information from Active Directory.

# Note: This ribbon group is only visible within the Office Timesheets self-install edition. This feature is not available with Office Timesheets On Demand (Hosted) edition.

## **Using Generic Import/Export Functions**

The Office Timesheets Generic Import and Export ribbon group contains features and functions that allow you to import data from and export data to virtually any database or spreadsheet application. The Office Timesheets Generic Import/Export utilizes the CSV (Comma Separated Value) file format, long an industry standard for importing and exporting data to and from database applications, spreadsheets, etc.

Office Timesheets uses templates for each data import and/or export you perform. Each import/export template can be saved, which allows for a great deal of functionality as each import/export template can be saved and re-used without re-entering import/export options and field mappings.

Each import/export template you create contains the name of the template, setup options, field mappings, and other options related to the importing or exporting data.

## **Import and Export Data Categories**

Importing and exporting data from and to Office Timesheets is broken down into seven (7) separate categories or data types:

- Employees
- Elements
- Expenses
- Groups
- Tasks
- Time Entries
- Expense Entries

To ensure that data is properly imported and/or exported, data is separated into logical categories. It is also important to note that before certain types of data can be imported into Office Timesheets and properly linked with other relational data elements, you must import one type one data category before another (covered in topics below).

## **Import/Export Templates**

Each data import or export for Office Timesheets starts with an import/export template. Thus, in order to import and/or export data into or from Office Timesheets you first create a template or open an existing import/export template.

## **Creating and running Import/Export Templates**

To create an import/export template:

- 1. Click on the **Import/Export** tab; then click on the **Import/Export** icon in the **Generic** ribbon group.
- 2. From the **Generic Text Import/Export** form enter a name for your import/export template in the **Name** field.
- 3. From the **Setup** form group

#### If importing time entries...

- a. Choose the format in which your time entries are stored in the file you are importing: **Minutes** or **Hours**. *This selection only applies if you are importing time entries.*
- b. Choose a row you wish to skip. For example, enter **1** if row 1 of your file contains column headers. If your file does not contain column headers, and you do not wish to skip a particular row within your import file, simply leave this field set as **0**.

#### If exporting time entries...

- a. Choose the format in which your entries to be stored in the file you are exporting: **Minutes** or **Hours**. *This selection only applies if you are exporting time entries.*
- b. Select the **Show titles** check box if you wish to show the field names (column headers) for each column of the file that is being exported.
- 4. From the Connection form group

#### If importing...

Choose the data **Section** you wish to import or export and enter the path to, and the name and extension of the file you wish to import. Optionally, you may click the **Browse** button to select the path and file to be applied in the **File** field.

Connection —		
Import	<b>&gt;</b>	
Section	File	
Employee:	C:\employees.csv	Browse
Element:		Browse
Expense:		Browse
Group:		Browse

#### If exporting...

Enter the path and full name of the file (with .csv extension) you wish to export in the **File** field of the corresponding **Section**.
Export —	
Section	File
Employee:	
Element:	
Expense:	
Group:	
Task:	
Time Entry:	C:\time_entries.csv
Expense Entry:	

5. Click on the template button to open the **Mapping Template Editor** dialog box.

\*\*For a list of field names and field descriptions please refer to the *Field Names and Descriptions by Import/Export Category* topic below.

a. Choose the corresponding data **Section** in which you are importing or exporting...

Mapping T	emplate	Editor			х
к	X	Add	e	<ul><li>▲ Move Up</li><li>▼ Move Down</li></ul>	
Actions	s	Edit		Move	
Section Available FIRST_NA MI LAST_NA EMP_DISP EMPLOYEE REPORTINE HOLIDAY TIME_ENTR EXPENSE_E EX_ID EMPLOYEE EMPLOYEE EMPLOYEE EMPLOYEE	(Import) E (Import) E (Import) E (Import) C (Import) T (Import) T (Import) T (Import) E (Export) E (Export) E (Export) C (Export) T (Export) T	mployee mployee lement xpense Group ask ime Entry xpense Entry mployee lement Expense Group Task Time Entry Expense Entry		Added Fields	

b. Double-click on fields in the **Available Fields** column to select the fields in which you wish to import or export. The fields you have selected will appear in the **Added Fields** column.



Use the **Move Up/Move Down** button in the **Move** ribbon group if you wish to change the order of fields in which you've added. This is done simply by selecting the field you wish to move up or move down and then clicking on the **Move Up** or **Move Down** button the number of times you wish to move the field up or down.

Use the **Remove** button in the **Edit** ribbon group to remove a field from the **Added Fields** column by highlighting the field you wish to remove, and selecting **Remove**.

6. Choose and/or select import/export options

If importing data refer to the Import form group...

Import					
📃 Replace existing tas	ks		From	02/11/2008	
Duplicate handling	Add	•	То	02/11/2008	
Entry Status Field	ls		Task S	tatus Fields	

Replace existing tasks – this option replaces an existing task within Office
 Timesheets when the same task is imported. For example, you import the same task,
 but with updated task information such as new task start and end dates, etc. In this
 case, the task in Office Timesheets will be replaced with the new task in which you
 are importing. If you do not select this option, then a task with identical element
 item selections will be ignored upon import.



Duplicate Handling (Add, Ignore, Replace) – if duplicates items are imported this selection tells Office Timesheets what to do with the duplicate item on import. If you select Add, Office Timesheets will add the record as a duplicate item. If Ignore is selected Office Timesheets will ignore or skip the duplicate record on import. If Replace is selected, Office Timesheets will replace the existing record within Office Timesheets when importing the record.



• **From** – if importing time and expense entries, you can select a **From** and **To** date in which to import entries.

				_						
From	01	01/2	2008							
То	4		J	anu	ary,	200	8		Þ	
		Su	Мо	Tu	We	Th	Fr	Sa		
Task S		30	31	1	2	3	4	5		
		6	7	8	9	10	11	12		
		13	14	15	Tue	sday	, Jan	iuary	/ 01	, 2008
		20	21	22	23	24	25	26	_	
02/11/2008		27	28	29	30	31	1	2		
02/11/2008		3	4	5	6	7	8	9		
Selection.		Today: February 11, 2008								

• **To** - if importing time and expense entries, you can select a **From** and **To** date in which to import entries.

То	03	03/31/2008								
Teels O	4		- 1	Marc	ch, 2	008			Þ	
Task S		Su	Мо	Tu	We	Th	Fr	Sa		
		24	25	26	27	28	29	1		
		2	3	4	5	6	7	8		
2/11/2008		9	10	11	12	13	14	15		
2/11/2000		16	17	18	19	20	21	22		
2/11/2008		23	24	25	26	27	28	29		
		30	31	1	2	3	4	5		
Selection.			_							
		Monday, March 31, 2008								
		100ay; 1 ebruary 11, 2000								

 Entry Status Fields – this button opens the Entry Status Fields selection dialog box. From this dialog you can choose to import time and/or expense entries that contain your selected settings by using the Include column settings. You may also choose to set the status of entries upon import by using the Set as column settings.

Entry Status Fields	
Close	
Actions Entry Status Fields	Include
Billable Overtime Approval status	Ignore  Ignore Checked Unchecked

• Include – will only import entries with included entry status selections.

• Set As – will set the entry status to the selected settings upon import.

	x
	Set as
•	Checked  Ignore Checked Unchecked

- Task Status Fields this button opens the Task Status Fields selection dialog box.
   From this dialog you can choose to import tasks that contain your selected settings by using the Include column settings. You may also choose to set the status of tasks upon import by using the Set as column settings.
  - Include will only import tasks with included task status selections.

Task St	atus Fields	
X		
Close		
Actions		
		Include
Complet	te	Ignore 👻
Billable		Ignore 👻
		Ignore Checked
		Unchecked

• Set As - will set the task status to the selected settings upon import.

Include Set as Ignore  Ignore  Ignore  Ignore  Ignore Ignore Ignore		X
Ignore    Ignore Ignore    Checked Ignore    Checked	Include	Set as
Ignore  Ignore Checked Ignore Checked	Ignore	✓ Ignore ✓
Ignore Checked	Ignore	▼ Checked ▼
Checked		Ignore
		Checked

If importing data refer to the **Export** form group (shown below)...

02/11/2008
02/11/2008
Selection

 Delete data after export – check this box if you wish to delete the selected data after export. Use extreme caution with this selection setting as it deletes the selected data permanently from the Office Timesheets database.



• **From** - if exporting time and expense entries, you can select a **From** and **To** date in which to export entries.

01	/01/2	2008									
January, 2008         ▶           Su Mo Tu We Th Fr Sa         30 31 1 2 3 4 5											
	Su Mo Tu We Th Fr Sa										
	30	31	1	2	3	4	5				
	6	7	8	9	10	11	12				
13 14 1 Tuesday, January 01,											
	20	21	22	23	24	25	26				
	27	28	29	30	31	1	2				
	3	4	5	6	7	8	9				
	То	day:	Feb	ruar	y 11,	200	8				

• **To** - if exporting time and expense entries, you can select a **From** and **To** date in which to export entries.

То	03/31/2	2008							
	4	March, 2008							
	Su	Мо	Tu	We	Th	Fr	Sa		
	24	25	26	27	28	29	1		
	2	3	4	5	6	7	8		
	9	10	11	12	13	14	15		
	16	17	18	19	20	21	22		
	23	24	25	26	27	28	29		
	30	31	1	2	3	4	5		
		_							
	То	day.	/lon	day,	Mar	ch 3	1, 20	08	

- Entry Status Fields this button opens the Entry Status Fields selection dialog box. From this dialog you can choose to export time and/or expense entries that contain your selected settings by using the Include column settings. You may also choose to set the status of entries upon export by using the Set as column settings.
  - Include will only export tasks with included task status selections.
  - Set As will set the task status to the selected settings upon export.
- Task Status Fields this button opens the Task Status Fields selection dialog box. From this dialog you can choose to export tasks that contain your selected settings by using the Include column settings. You may also choose to set the status of tasks upon export by using the Set as column settings.
  - Include will only export tasks with selected task status selections.
  - **Set As** will set the task status (of selected tasks) to the selected settings upon export.

 Selection (Level Selections) – this button opens the Selection dialog box. From this dialog you can choose to export tasks that contain your selected level settings.

Selection		>
$\mathbf{\mathbf{v}}$		
×		
Close		
Actions		
Employee	{AII}	
Client	{AII}	
Project	{All}	
Phase	{AII}	
Activity	{AII}	
Payroll Item	{AII}	

- Category Selection (Employee, Element, Expense, Group, Task, Time Entry, Expense Entry) – here you must choose the data category for which you are exporting.
- Employee
  Element
  Expense
  Group
  Task
  Time Entry
  Expense Entry
- 7. Click **Import** or **Export** to initiate the process of importing and/or exporting data using the template in which you've created.

Import Export

#### Saving import/export templates

Once you've created an import or export template you can save it for re-use at another date. To save your import/export template:

1. Click on the **Save The Current Template** icon in the **Generic** ribbon group.



2. A message will appear that the template was successfully saved; click **OK**.



### **Retrieving import/export templates**

To retrieve an import and/or export template you previously created and saved:

1. From the **Import/Export** tab, click on the **Display list of templates** icon in the **Generic** ribbon group.



2. From the **Import/Export templates** list dialog, select the template in which you wish to retrieve, and click the **Load** icon.

Import /	Export Templ	lates List	x
Load	Close Close		
		<u></u>	
Oracle E Employe	Batch Export		

## **Copying import/export templates**

The **Copy** function allows you to copy existing import/export templates to another Office Timesheet user's Import/Export template list. To copy import/export templates to another Office Timesheets user's template list:

- 1. From the **Import/Export** tab, click on the **Display list of templates** icon in the **Generic** ribbon group.
- 2. From the **Import/Export templates** list dialog, select the template in which you wish to copy, and click the **Copy** icon.

Import / Export Templates List	x
Close	
Load Copy	
Templates	
Oracle Batch Export	
EmployeeExport	

The Copy Import/Export Templates dialog box will appear...

3. From the **Copy Import/Export Templates** dialog box, select the **Employees** for which you will copy the template/s to, and choose one or both options replacing and/or copying templates; and select **OK**.

Copy Data Exchange Templates 🗙		
XX		
OK Cancel		
Actions		
Employees		
Thomas Garrett		
Replace existing templates		
Copy all templates		

## **Deleting import/export templates**

To delete an existing import/export template:

- 1. From the **Import/Export** tab, click on the **Display list of templates** icon in the **Generic** ribbon group.
- 2. From the **Import/Export templates** list dialog, select the template in which you wish to delete, and click the **Delete** icon.

## Fields Names and Descriptions by Import/Export Category

Below is a list of fields and a description of each field, by import/export category, that is available for import and/or export with Office Timesheets.

#### **Employees (Import/Export)**

Field Name	Description
FIRST_NAME	Employee's First Name
MI	Employee's Middle Initial
LAST_NAME	Employee's Last Name
EMP_DISPLAY_NAME	Employee's Display Name
EMPLOYEE_EMAIL	Employee's Email Address
EMPLOYEE_STATUS	Employee's Status
REPORTING_PERIOD	Employee's Reporting Period
HOLIDAY_GRP	Employee's Holiday Group
TIME_ENTRY_LOCK_DATE	Employee Time Entry Lock Date
EXPENSE_ENTRY_LOCK_DATE	Employee's Expense Entry Lock Date
EX_ID	ID Number for the Employee that was generated by an external program
EMPLOYEE_GRP-1	Employee's Group 1
through	
EMPLOYEE_GRP-25	Employee's Group 25
EX_GRP_ID-1	ID Number for Employee's Group 1 that was generated by an external program
through	
EX_GRP_ID-25	ID Number for Employee's Group 1 that was generated by an external program
STD_RATE_TAB_A-1	Employee's Standard Rate for Tab A
OVT_RATE_TAB_A-1	Employee's Overtime Rate for Tab A
EFF_DATE_TAB_A-1	Employee's Effective Date for Standard and Overtime Rates for Tab A
THROUGH	
STD_RATE_TAB_E-10	Employee's Standard Rate for Tab E
OVT_RATE_TAB_E-10	Employee's Overtime Rate for Tab E
EFF_DATE_TAB_E-10	Employee's Effective Date for Standard and Overtime Rates for Tab E
EMP_CUSTOM-1	Employee Custom Field 1
Through	
EMP_CUSTOM-10	Employee Custom Field 10

## **Elements (Import/Export)**

Field Name	Description
ELEMENT_LEVEL	Element's level number
ELEMENT_NAME	Element's level name
ELEMENT_ABBR	Element's abbreviation
ELEMENT_STATUS	Element's status
EX_ID	ID number of the element generated from an external program
ELEMENT_GRP-1	Employee's group 1
through	
ELEMENT_GRP-25	Employee's group 25
EX_GRP_ID-1	ID number of the element's group 1 generated from an external program
through	
EX_GRP_ID-25	ID number of the element's group 25 generated from an external program
ELM_CUSTOM-1	Element's custom field 1
through	
ELM_CUSTOM-10	Element's custom field 10
SKIP	Skips the selected column

### **Expenses (Import/Export)**

Field Name	Description
EXPENSE_NAME	Expense item's name
EXPENSE_DESCR	Expense item's description
EXPENSE_STATUS	Expense item's status
EX_ID	ID number of expense item generated by an external program
PRICE	Expense item's price
QUANTITY	Expense item's quantity
MARK_PERCENT	Expense item's mark up or mark down percentage
TAX_PERCENT	Expense item's tax percentage
EXPENSE_GRP-1	Expense item's group 1
through	
EXPENSE_GRP-25	Expense item's group 25
EX_GRP_ID-1	ID number of expense item group 1 generated by an external program
through	
EX_GRP_ID-25	ID number of expense item group 25 generated by an external program
EXP_CUSTOM-1	Expense item's custom field 1
through	

SKIP

EXP_CUSTOM-10	Expense item's custom field 10
SKIP	Skips the selected column

### **Groups (Import/Export)**

Field Name	Description
ELEMENT_LEVEL	Group's element level
GRP_NAME	Group's name
EX_ID	ID number of group generated by external program
GROUP_MANAGER	Display of group manager (Employee Groups Only)
SKIP	Skips the selected column

#### Tasks (Import/Export)

Field Name	Description
EMP_ID	Employee ID
EMP_EX_ID	Employee ID generated by an external program
EMP_DISPLAY_NAME	Employee's display name
ELEMENT_ID-1	ID number for element level 1
Through	
ELEMENT_ID-10	ID number for element level 10
ELEMENT_EX_ID-1	ID number for element level 1 generated by an external program
Through	
ELEMENT_EX_ID-10	ID number for element level 10 generated by an external program
ELEMENT_NAME_LVL-1	Element level 1 name
Through	
ELEMENT_NAME_LVL-10	Element level 10 name
ELEMENT_ABB_LVL-1	Element level 1 abbreviation
Through	
ELEMENT_ABB_LVL-10	Element level 10 abbreviation
TASK_RATE	Task rate
TASK_STATUS-1	Task status 1
Through	
TASK_STATUS-15	Task status 15
START_DATE	Task start date
END_DATE	Task end date
TRACK_RATE-1	Task tracking rate 1
Through	
TRACK_RATE-3	Task tracking rate 3

TRACK_HOURS-1	Task tracking hours 1
Through	
TRACK_HOURS-3	Task tracking hours 3
TASK_NOTES	Task notes
SKIP	Skips the selected column

### **Time Entries (Import/Export)**

Field Name	Description
ENTRY_DATE	Date of time entry
START_TIME	Start time of time entry
STOP_TIME	Stop time of time entry
TIME_SPENT	Calculated time spent (calculated from start time and stop time)
TIME_SPENT_ONLY	Time spent (if no start time and no stop time)
APPROVAL_STATUS	Entries approval status
EMP_ID	ID number of employee
EMP_EX_ID	ID number of employee generated from an external program
EMP_DISPLAY_NAME	Display name of employee
ELEMENT_ID-1	ID number of element level 1
Through	
ELEMENT_ID-10	ID number of element level 10
ELEMENT_EX_ID-1	ID number of element level 1 generated from external program
Through	
ELEMENT_EX_ID-10	ID number of element level 10 generated from external program
ELEMENT_NAME_LVL-1	Element level 1 name
Through	
ELEMENT_NAME_LVL-	
	Element level 10 name
ELEMENT_ABB_LVL-1	Element abbreviation for level 1
Through	
ELEMENT_ABB_LVL-10	Element abbreviation for level 10
ENTRY_STATUS-1	Status 1 of time entry
Through	
ENTRY_STATUS-15	Status 15 of time entry
ENTRY_NOTES	Notes for time entry
TRACK_RATE-1	Task's tracking rate 1
I nrough	
TRACK_RATE-3	Task's tracking rate 3
TRACK_HOURS-1	Task's tracking hours 1
Through	
TRACK_HOURS-3	Task's tracking hours 3

TASK_NOTES	Notes for task
SKIP	Skips the selected column

### **Expense Entries (Import/Export)**

Field Name	Description
ENTRY_DATE	Date of expense entry
APPROVAL_STATUS	Expense entry approval status
EMP_ID	ID number of employee
EMP_EX_ID	ID number of employee generated by an external program
EMP_DISPLAY_NAME	Employee's display name
ELEMENT_ID-1	ID number for element level 1
Through	
ELEMENT_ID-10	ID number for element level 10
ELEMENT_EX_ID-1	ID number for element level 1 generated by external program
Through	
ELEMENT_EX_ID-10	ID number for element level 10 generated by external program
ELEMENT_NAME_LVL-1	Name for element level 1
Through	
ELEMENT_NAME_LVL-10	Name for element level 10
ELEMENT_ABB_LVL-1	Abbrevation for element level 1
Through	
ELEMENT_ABB_LVL-10	Abbrevation for element level 10
EXPENSE_ID	ID number of expense entry
EXPENSE_EX_ID	ID number of expense entry generated by an external program
EXPENSE_NAME	Expense item name
ENTRY_STATUS-1	Expense entry status 1
Through	
ENTRY_STATUS-15	Expense entry status 15
ENTRY_NOTES	Expense entry notes
DESCRIPTION	Expense description
PRICE	Expense price
QUANTITY	Expense quantity
TOTAL	Expense total (expense price multiplied by expense quantity)
MARK_PERCENT	Expense markup or markdown percentage
MARK_TOTAL	Total of expense markup or markdown
TAX_PERCENT	Tax percentage
TAX_TOTAL	Total tax
APPLY_TAX	Apply tax setting
ENTRY_TOTAL	Total for entry (including markup/markdown and tax)
TRACK_RATE-1	Task tracking rate 1

Through	
TRACK_RATE-3	Task tracking rate 3
TRACK_HOURS-1	Task tracking hours 1
Through	
TRACK_HOURS-3	Task tracking hours 3
TASK_NOTES	Task notes
SKIP	Skips the selected column

## **Importing data into Office Timesheets**

Data can be imported into Office Timesheets in any order. However, you will find that a particular piece of data may be needed first as another record type may require a relational link to other data records first. For example, if importing employees records with the employee's group settings, employee groups must exist in order for the two data elements to link together.

When importing data into Office Timesheets, logically, you should consider importing data into Office Timesheets in the following order:

- 1. Employee Groups (a group must first exist if importing Employees with one or more group associations)
- 2. Employees
- 3. Element Groups (a group must first exist if importing Elements with one or more group associations)
- 4. Elements Items
- 5. Expenses (Expense Code Items)
- 6. Tasks (Employee Names and Element Item Names must exists before a task is created as each task is comprised of a combination of Employee and Element Item Selections)
- 7. Time Entries & Expense Entries

## How Office Timesheets links data types during import

The rules in which Office Timesheets uses to link data types for each import/export data category is as follows...

#### Groups

- a. If the External ID of an imported group is not empty, then Office Timesheets looks to find the group in the database (with this External ID). If the group is found, then Office Timesheets links the imported group to the matching group, else go to point "b".
- b. Office Timesheets looks to find a group in its database with the same Name of the imported group. If a group with the same name is found, then Office Timesheets links the imported group to the group with the same name, else go to point "c".
- c. Office Timesheets add the imported group to its database as a new group.

#### **Employees**

- a. If the External ID of an imported employee is not empty, then Office Timesheets looks to find the employee in the database with this External ID. If employee is found, then Office Timesheets links the imported employee to the matching employee, else go to point "b".
- b. Office Timesheets looks to find an employee in its database with the same name of imported employee. If an employee with the same name is found, then Office Timesheets links the imported employee to the employee with the same name, else go to point "c".
- c. Office Timesheets adds the employee to its database as a new employee.

#### **Elements**

- a. If the External ID of an imported element is not empty, then Office Timesheets looks to find an element in its database with this External ID. If the element is found, then Office Timesheets links the imported element to the matching element, else go to point "b".
- b. Office Timesheets looks to find an element in its database with the same Name of the imported element. If element is found, then Office Timesheets links the imported element to matching element, else go to point "c".
- c. Office Timesheets adds the element to its database as a new element.

#### **Expenses**

- a. If the External ID of an imported expense is not empty, then Office Timesheets looks to find an expense in its database with this External ID. If the expense is found, then Office Timesheets links the imported expense to the matching expense, else go to point "b".
- b. Office Timesheets looks to find an expense in its database with the same Name of the imported expense. If the expense is found, then Office Timesheets links the imported expense to the matching expense, else go to point "c".
- c. Office Timesheets adds the expense to its database as a new expense.

#### Tasks, Time Entries, Expense Entries

- a. If Employee ID of imported object (task/time entry/expense entry) is not empty, then find employee in DB with this Employee ID. If employee was found, then link Employee of imported object to found employee, else go to point "b".
- b. If Employee External ID of imported object is not empty, then find employee in DB with this Employee External ID. If employee was found, then link Employee of imported object to found employee, else go to point "c".
- c. Find employee in DB with Display Name of employee of imported object. If employee was found, then link Employee of imported object to found employee, else imported object will be without Employee.
- d. If Element-X (element with level X) ID of imported object is not empty, then find Element-X in DB with this Element-X ID. If Element-X was found, then link Element-X of imported object to found Element-X, else go to point "e".
- e. If Element-X External ID of imported object is not empty, then find Element-X in DB with this Element-X External ID. If Element-X was found, then link Element-X of imported object to found Element-X, else go to point "f".
- f. Find Element-X in DB with Name of imported Element-X. If Element-X was found, then link Element-X of imported object to found Element-X, else go to point "g".
- g. Find Element-X in DB with Display Name of Element-X of imported object. If Element-X was found, then link Element-X of imported object to found Element-X, else imported object will be without Element-X.

- h. If Expense ID of imported object is not empty, then find expense in DB with this Expense ID. If expense was found, then link Expense of imported object to found expense, else go to point "i".
- If Expense External ID of imported object is not empty, then find expense in DB with this Expense External ID. If expense was found, then link Expense of imported object to found expense, else go to point "j".
- j. Find expense in DB with Name of expense of imported object. If expense was found, then link Expense of imported object to found expense, else imported object will be without Expense.

*Note: points "h"-"j" only apply to Expense Entries.* 

## **Example: Exporting Employee Information**

Please carefully read the instructions below as any deviation from these steps will result in an unsuccessful export.

To export data from Office Timesheets:

1. Click on the "Import/Export" tab.



2. Enter in the name of the Element/Item(s) being exported into the "Name" field. For example if you were exporting Employee information enter in "Employee" in the "Name" field.



3. On the lower left hand corner of the page click on the "Template" button to open the "Mapping Template Editor".

- Cornection		Delete data after export From 08/05/2008	
- Import		To 08/05/2008	
Section File		Entry Status Fields Selection	
Employee:	Browse		
Element	Browse	Task Status Fields	
Expense:	Browse	@ Employee	
Group:	Browse	Clamant	
Task	Browse	Cerement	
Time Entry:	Browse	Operation	
Expense Entry:	Browse	Oracle	
Export Sector File		O Time Entry	
Employee:		C Expense Entry	
Element			
Expense			
Group:			
Task			
Time Entry			
Expense Entry			

4. Choose the appropriate Element/Item you are exporting from the "Section" drop down menu. For example if you were exporting Employee information select "(Export) Employee".



5. We strongly recommend selecting and adding (Add button) every "Available Fields" choice with the exception of any choices that begin with "EX" to ensure all valid information is not missed during the export. Choices that begin with "EX" is solely for importing purposes and will not be used for the export process. When you have completed your selection click on **OK**.



6. Under the "Export" (Right most field) field choose the appropriate dates. For example if a "Task" began 08/05/08 you will enter this date within the date field to ensure this task is exported properly.

General				Import							
ime Employee				Replace existing tasks	Fro	m	0	8/05	2008	3	ï
- Setup				Duplicate handling Add 🗸	То		0	8/05	2008	3	
Import		Export									_
Time spent	Minutes 😽	Time spent Min	utes 😽	Entry Status Fields	Ta	ask	Stat	tus I	Field	IS	
- Connection -				Delete data after export From	þ8/05/2	2008 A	ugų	h	2008	<u> </u>	
Section	File				Su	Мо	Tul	Selei	tDa	te	5
Employee:			Browse	Entry Status Fields	27	28	29	30	31	1	
Element			Browse	Task Status Fields	10	11	12	13	14	15	
Expense:			Browse		17	18	19	20	21	22	
Group:			Browse	Employee	24	25	26	27	28	29	
Task:			Browse	OElement	31	1	2	9	4	2	
Time Cater			Browse	OExpense		Today	y: AL	ugust	5, 2	008	
Time Enuy.				C LEFOUD	10			-			

7. Under the "Export" field (Right most field) it is very important to choose the appropriate Element/Item you are exporting. For example if you are exporting Employee information select the "Employee" option below the "Task Status Fields..." button.

General			Import
me Employee			Replace existing tasks From 08/06/2008
- Setup			Duplicate handling Add 🖌 To 08/06/2008 🏢
— Import — Time spent [ Rows to skip	Minutes V 0 Export Time spent Minu	ites 💌	Entry Status Fields Task Status Fields
1			Export
<ul> <li>Connection -</li> <li>Import</li> </ul>			Delete data after export From 08/05/2008
Section	File		Entry Status Fields Selection
Employee:		Browse	
Element		Browse	Task Status Fields
Expense:		Browse	© Employee
Group:		Browse	Clopert
Task:		Browse	Creater
Time Entry:		Browse	Carve
Expense Entry:		Browse	OTask
Export			O Time Entry
Employee:	rile		C Expense Entry

8. Select the "Save the Current Template" button in the "Generic" Ribbon Group in the top menu to save your current configuration for the particular Element/Item.

学 View She	ets Import / Export	Reports Proce	ess Management	System Configuration
Import / Export	Save The Current Template	Import / Export	Preferences	Import
	Generic	MS Project	QuickBooks	Active Directory
Generic Text Imp	oort / Export			
— General —			(	Import
Name Employee				Replace existing tasks

9. Under the "Export" field (Left most field) create and enter the name of your file in the appropriate "Section" and add the .csv extension. For example if you are exporting Employee information type in Employee.csv.

Connection			Delete data after export From	08/08/2008
— Import —			То	09/30/2008
Section	File		Entry Status Fields	Selection
Employee:		Browse	Entry claige risids	Colocation
Element:		Browse	Task Status Fields	
Expense:		Browse	Employee	
Group:		Browse	OFlement	
Task:		Browse	OExpense	
Time Entry:		Browse	O Group	
Expense Entry	<i>с.</i>	Browse	OTask	
Export				
Section	File		O Expense Entry	
Employee:	Employee.csv			
Element:				
Expense:				
Group:				
Task:				
Time Entry:				
Expense Entry	Г.			

10. Select the "Export" button and save the file to your desktop.

Section	File	C Expense Entry	
Employee:	Employee.csv		
Element:			
Expense:			
Group:			
Task:			
Time Entry:			
Expense Entry	q		
Template			
			Import Export

11. Repeat step 1 until all desired Elements/Items have been exported and saved to your desktop.

### **Example: Importing Employee Information**

To import data into Office Timesheets:

1. Click on the "Import/Export" tab.



2. Enter in the name of the Element/Item(s) being imported into the "Name" field. For example if you were importing Employee information enter in "Employee (Import)" in the "Name" field.



3. On the lower left hand corner of the page click on the "Template" button to open the "Mapping Template Editor".

Connection		Delete data after export From 08/05/2008	
Import		To 08/05/2008	
Section File		Colority Otation Fields	
Employee:	Browse	Entry Status Fields Selection	
Element:	Browse	Task Status Fields	
Expense:	Browse	05-1	
Group:	Browse	C Employee	
Task	Browse	OElement	
Time Entry:	Browse	O Expense	
Expense Entry:	Browse	O Group	
		O Task	
Sector File		O Time Entry	
Employee		C Expense Entry	
Element			
Expense:			
Group:			
Task			
Time Entry:			
Expense Entry			
I	1		

4. Choose the appropriate Element/Item you are importing from the "Section" drop down menu. For example if you were importing Employee information select "(Import) Employee".



5. We strongly recommend selecting and adding (Add button) every "Available Fields" choice with the exception of any choices that begin with "EX" to ensure all valid information is not missed during the export. The only time a user would choose the options that begin with "EX" is importing data from another 3rd Party application. When you have completed your selection click on **OK**.

OK Cancel	Add	<ul> <li>▲ Move Up</li> <li>▼ Move Down</li> </ul>	
Actions	Edit	Move	
Section (Import) Available Fields	Employee 💙	Added Fields	
SKIP FIRST_NAME MI LAST_NAME EMP_DISPLAY_NAMI EMPLOYEE EMAIL	E	SKIP FIRST_NAME MI LAST_NAME EMP_DISPLAY_NAME EMPLOYFE EMAIL	
EMPLOYEE_STATUS REPORTING_PERIOD HOLIDAY_GRP TIME_ENTRY_LOCK_ EXPENSE_ENTRY_LC EX_ID EMPLOYEE_GRP-1 EMPLOYEE_GRP-2 EMPLOYEE GRP-2	DATE DCK_DATE		
EMPLOYEE GRP-4			

6. Under the "Import" field (Right most field) choose the appropriate dates. For example if a "Task" began 08/08/08 you will enter this date within the date field to ensure this task is imported properly.

View Sheets Import / Export Reports F	ocess Management System Configuration			
Import / Export	Preferences Import			-
Generic MS Project	QuickBooks Active Directory			
Generic Text Import / Export				
General	Import			
Name Employee (Import)	Replace existing tasks	From 08/08/20	800	
Setup	Duplicate handling Add	V To 📢	August, 2008	
Time spent Minutes V Time spent Minutes V	Entry Status Fields	Task S 27	40 Tu We Th Fr Sa 28 29 30 31 1 2 4 5 6 7 8 9	
Rows to skip 0 Show titles	Export	10	11 12 13 14 15 /16 18 19 20 21 22 Friday, Aug	gust 08, 2008
Connection Import		0 08/08/2008 31	25 26 27 28 29 30 1 2 3 4 5 6	
Section File Employee: Browse	Entry Status Fields	Selection To	oday: August 8, 2008	
Element: Browse	Task Status Fields			

7. Select the "Save the Current Template" button in the "Generic" Ribbon Group in the top menu to save your current configuration for the particular Element/Item.

View Sheets Import / Export	Reports Proce	ess Management	System Configuration	-	-
Generic	MS Project	QuickBooks	Active Directory		
- General			Import		
Jame Employee (Import)			Replace existing tasks	From	08/08/2008
Setup		D	plicate handling Add	То	09/27/2008
Time spent Minutes V Time spent	Minutes 🗸		Entry Status Fields	Task	Status Fields

8. Under the "Import" field (Left most field) click "Browse" for the appropriate "Section" and select the .csv file you wish to import.

Oatua	
- Setup	
- Import	Export
Time spent Minutes ⊻	Time spent Minutes ⊻
Rows to skip 0	Show titles
Import Section File	
Import Section File	Browse
Import Section File Employee: Element:	Browse
Import Section File Employee: Element: Expense:	Browse
Import     Section     File Employee: Element: Expense: Group:	Browse Browse Browse Browse
Import Section File Employee: Element: Expense: Group: Task:	Browse Browse Browse Browse Browse
Import     Section     File Employee: Element: Expense: Group: Task: Time Entry:	Browse Browse Browse Browse Browse Browse

9. Select the "Import" button and the corresponding Section within Office Timesheets will populate with the imported information.

- Connection -			Derete data alter export From 08/08/2008
- Import			To 08/08/2008
Section	File		Entry Status Fields Selection
Employee:	C:\Desktop\Employee.csv	Browse	
Element		Browse	Task Status Fields
Expense:		Browse	Employee
Group:		Browse	Climpioyee
Fask:		Browse	O Evenence
Time Entry:		Browse	Oceanie
Expense Entry:		Browse	Oracle
— Export — Section Employee: Element Expense: Group: Task: Time Entry:	File		C Time Entry
Expense Entry: Template			Imp <mark>ing</mark> Exp

10. Repeat step 1 until all desired Elements/Items have been imported into Office Timesheets.

# Appendix

### **Using the Date Picker**

For any items where you have to enter a date, Office Timesheets provides you with a Date Picker tool. Instead of typing a date, you can use the Date Picker tool to select a date from a pop-up calendar.

To use the Date Picker to select a date:

- 1. Click on the Date Picker button (). A pop-up calendar will appear on the screen.
- 2. Using the controls on the pop-up calendar, navigate to the required year and month.

To select a date, click on a date in the pop-up calendar. The calendar will disappear and the selected date will be displayed in the accompanying date field.

**TIP:** After clicking on the Date Picker button, if you decide not to select a date, just click anywhere outside the pop-up calendar.

The following figures illustrate how to use the Date Picker:

#### **Date Picker: Date View**



**Date Picker: Month View** 



#### **Date Picker: Decade View**



### **Using the Select Element Dialog Box**

In many of the dialog boxes in Office Timesheets, when you click on the 🔤 button, Office Timesheets displays the Select element dialog box.

✓ X	
OK Cancel	
Actions	
Group	
(All)	×
Names	
{AII}	<b>^</b>
Anderson A Brian	
Anderson A. Lloyd	
Anderson L. Thomas	
Aston C. Tara	
Brown H. Alan	
Clark K. Lauron	
Cooper C. James	
Costa E Matthew	
Eabiano H. Ryan	
Freeman A Kelly	
Garcia R James	
Jessup S. Richard	
Kaplan S. Lindsay	×
Status Active	

The following table describes the various items found in the Select element dialog box:

Item	How to use the Item	Default Value (if any)
Names	To refer to a particular item, <b>select the name</b> from this list. OR To refer to all the items in this list, select <b>{All}</b> . For example, while assigning Regional Options to employees, if you click on the button to select an employee's name, the <b>Select element</b> dialog box will appear. If you select an employee's name, the Regional Options will be set for that employee alone, whereas if you select <b>{All}</b> , the Regional Options will be set for all the employees. TIP: In some instances, if an element has already been selected and you want to remove the selection, you can click on the button and select <b>{No selection}</b> in the <b>Select element</b> dialog box.	
Status	If there are too many names in the <b>Names</b> list, you can filter the entries by selecting from the <b>Status</b> drop-down list. Select <b>Active</b> to view only the active users, or select <b>All</b> to view all the users.	Active
Group	If there are too many names in the <b>Names</b> list, you can filter the entries by selecting a group or department from the <b>Group</b> drop-down list. For example, you could select <b>Public Relations</b> to view only those employees from the PR Department. <b>TIP:</b> In some instances, if you want to select the entire group, select the name of the group in the <b>Group</b> drop-down list and select <b>{Group}</b> in the <b>Names</b> panel.	{All}
Actions	The <b>Actions</b> panel at the top left corner of the <b>Select</b> <b>element</b> dialog box, contains buttons for either accepting or rejecting your changes.	
The OK button	Click the <b>OK</b> button to confirm or accept your selections and close the <b>Select element</b> dialog box.	
The Cancel button	Click the <b>Cancel</b> button to close the <b>Select element</b> dialog box without accepting your selections.	

Item	How to use the Item	Default Value (if any)
	<b>Note:</b> You can also click on the <b>Close</b> button at the top right corner of the <b>Select element</b> dialog box to close the dialog box without accepting your selections.	

## Using the List Items Dialog Box

While defining custom fields, if you select List from the Type drop-down list, a button will appear. Click on the button to open the List Items dialog box.



Use the List Items dialog box to:

- add items to a list;
- make changes to the existing items in a list;
- delete items from a list; and
- change the order of the items within the list.

То	Do this
Add an item to the drop-down list	Type the value in the text box and click the <b>Add</b> button.
Make changes to an existing item	Type a value in the text box. Then, click on an item in the list box, and click the <b>Edit</b> button. The value that you type in the text box will replace the selected value in the list box.
Delete an item	Click on the item in the list box and click the <b>Delete</b> button.
Change the order of the items in the list	Click on an item in the list box and click the <b>Move Up</b> or <b>Move Down</b> buttons to move the item.
Save your changes and close the List	Click <b>OK</b> .

То	Do this
Items dialog box	