Office Timesheets

Quick Start Guide | www.OfficeTimesheets.com

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Attention Sage 100, Sage HRMS/Abra, Sage 300 and QuickBooks Users!

If you wish to use Office Timesheets in conjunction with Sage 100, Sage HRMS/Abra, Sage 300 Payroll or QuickBooks please request the appropriate Sync App and documentation from our sales team by emailing sales@officetimesheets.com or calling 866-425-0800.

What is the Office Timesheets Quick Start Guide?

The Office Timesheets Quick Start Guide highlights the core features and concepts of Office Timesheets and is designed to help you get up and running with the product by giving you a foundation that you can then use to configure your own unique setup within the product. However, there are many features and functions of Office Timesheets that are not covered in this guide. Please consult the Office Timesheets Administration and User's Guide for detailed explanations and procedures in implementing features found within Office Timesheets.

We highly recommend going through the Quick Start Guide with the Office Timesheets Sample Database. The sample database is provided with each installation of Office Timesheets.

How to access Office Timesheets after installation

Office Timesheets creates two databases for you upon installation: a sample database and a blank database. The sample database is configured with sample user accounts, employees, time entries, etc.; and is designed for you to explore the application before configuring your own live database. The Office Timesheets Quick Start Guide also uses the sample database to walk you through some of Office Timesheets' popular features and functions. Thus, 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 blank database.

Accessing and logging into the Office Timesheets Sample Database

To access your Office Timesheets sample database:

1. Open your web browser.
2. Type in the URL for Office Timesheets Sample Database default page by using the following conventions http://computername/virtualdirectory (example: http://localhost/OTSSample).
3. Use the following login information to log into the Office Timesheets sample database:

   For Administrator Login (recommended for first login…has all security rights)

   Username = admin
   Password = 1

   For Manager Login (has security rights related to managing employee group)

Username = manager
Password = 2

For User Login (basic user login profile…only has rights to enter and submit time and expense sheets)

Username = user
Password = 3

Accessing and logging into your Office Timesheets Blank Database

To access your Office Timesheets blank database:

1. Open your web browser.
2. Type in the URL for Office Timesheets Sample Database default page by using the following conventions http://computername/virtualdirectory (example: http://server1/OTS).
3. Use the following login information to log into the Office Timesheets sample database:

   Username = admin
   Password = 1

   NOTE: If you are using Office Timesheets On Demand (hosted version), the username and password will be different than what is shown above when accessing your blank database. The Username and Password were specified by you at the time you created the account. This information is also emailed to you.

Define Element Tracking Levels

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 give the time entries meaning, such as who performed the work and what type of work was done. A task is comprised of a combination of an Employee and one or more Element Items, which are defined at each Element Level. Within Office Timesheets you can create up to 10 Element Levels to define tasks. At each element level, a list of element items is created. By default, Office Timesheets is setup with three (3) Element Levels:

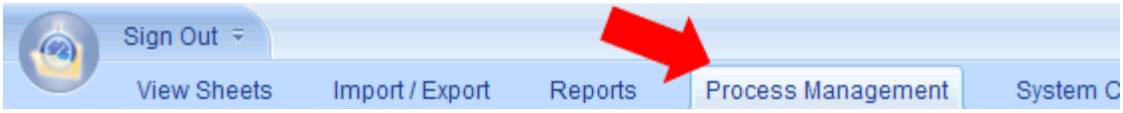
1. Client
2. Project
3. Activity

Thus, each task could be comprised as follows: employee name + client + project + activity. This would be your basic foundation for creating tasks on employee timesheets for recording time entries. This setup would allow you to easily create reports whereby you could sort/total/sub-total/ time, costs, and expenses by employee, client, project, and activity. Therefore, your definition of Element Levels

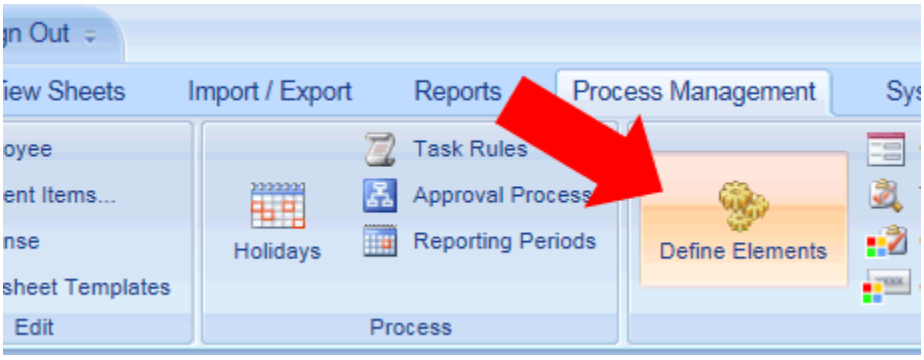
becomes the framework or foundation for your organization's time and expense tracking database. In summary, elements are essentially buckets in which time tracked against and can be later sliced and diced for reporting, billing, payroll, etc.

To create your organization's own unique task element structure, do the following:

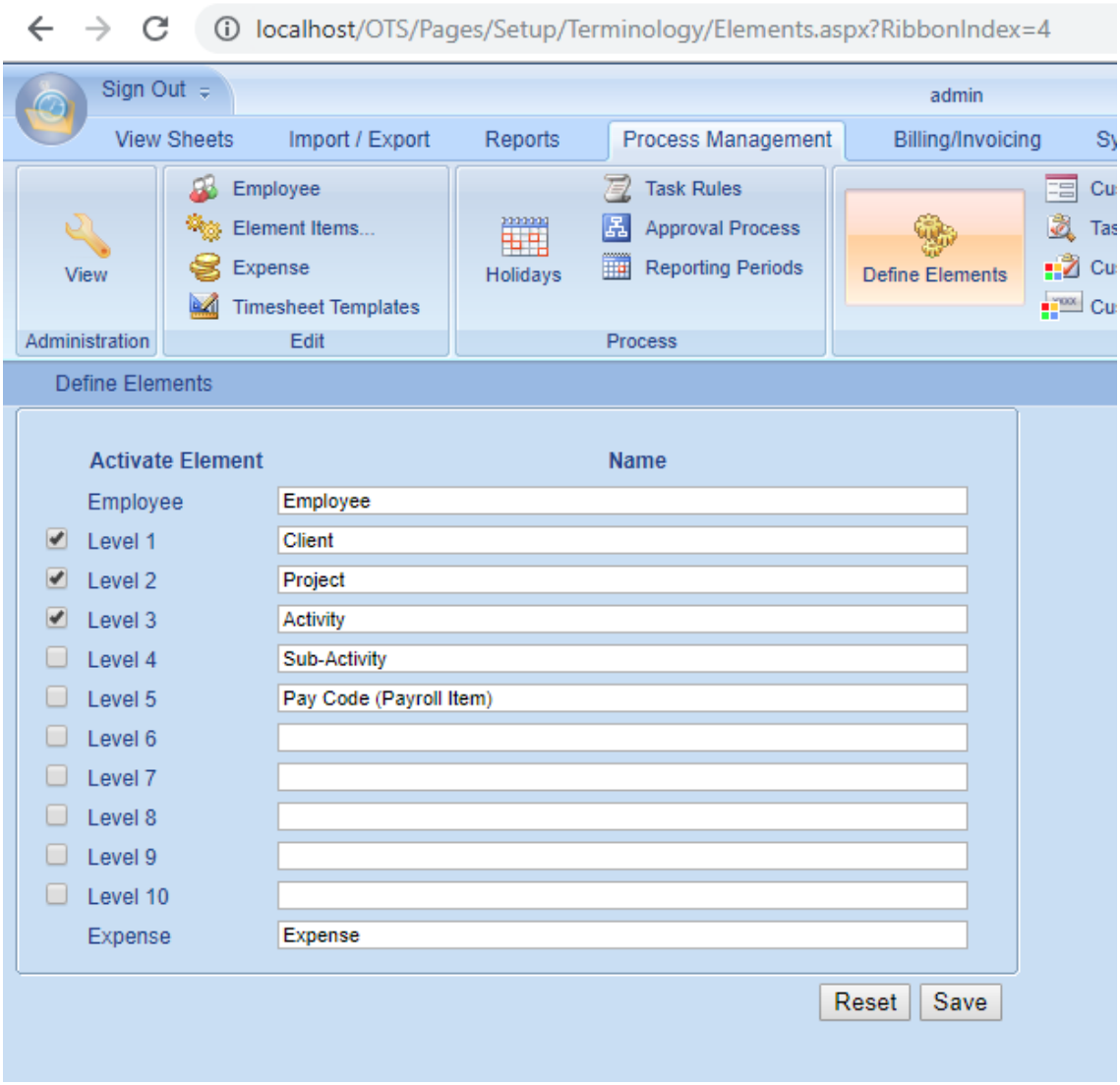
1. Log into Office Timesheets if you have not done so already.
2. Click on the **Process Management** tab.



3. From the Process Management section; click on the **Define Elements** icon found in the **Customize** ribbon group.



4. Activate the number of Element Levels you wish to use by selecting the **Activate Element** level check boxes; then type in the name of each Element Level you wish to create in a hierarchical order in the name fields; then after double-checking your typing and element level order, click the **Save** button to save your Element Level definitions.



Add Employees and Elements Items

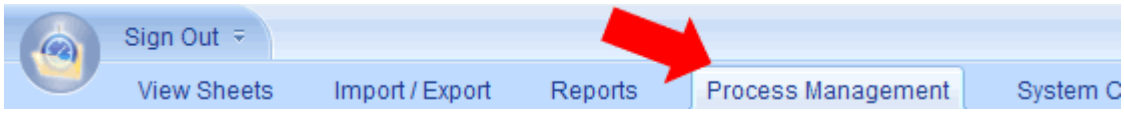
Now that you've defined your company's Task Element framework, the next step is to define your company's employees and element lists within Office Timesheets.

Adding Employees and Employee Groups

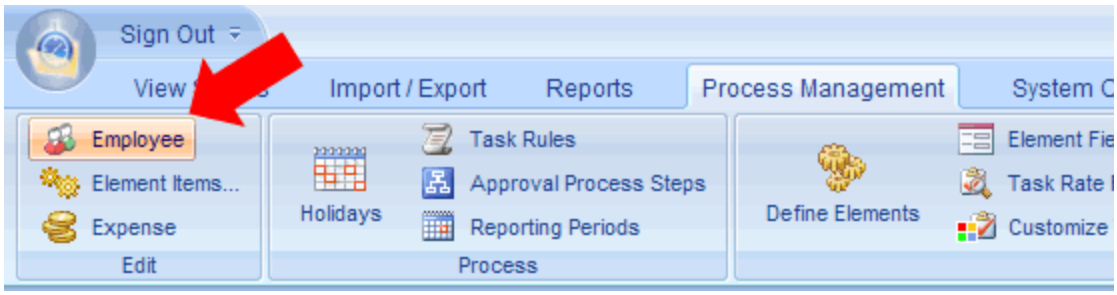
An employee is created within Office Timesheets for each person whose hours you wish to track. Every task created in Office Timesheets requires an employee to be associated with it. Employees may also be grouped using Office Timesheets Employee Groups function. Employee Groups allow you to manage employees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

To Add an Employee in Office Timesheets:

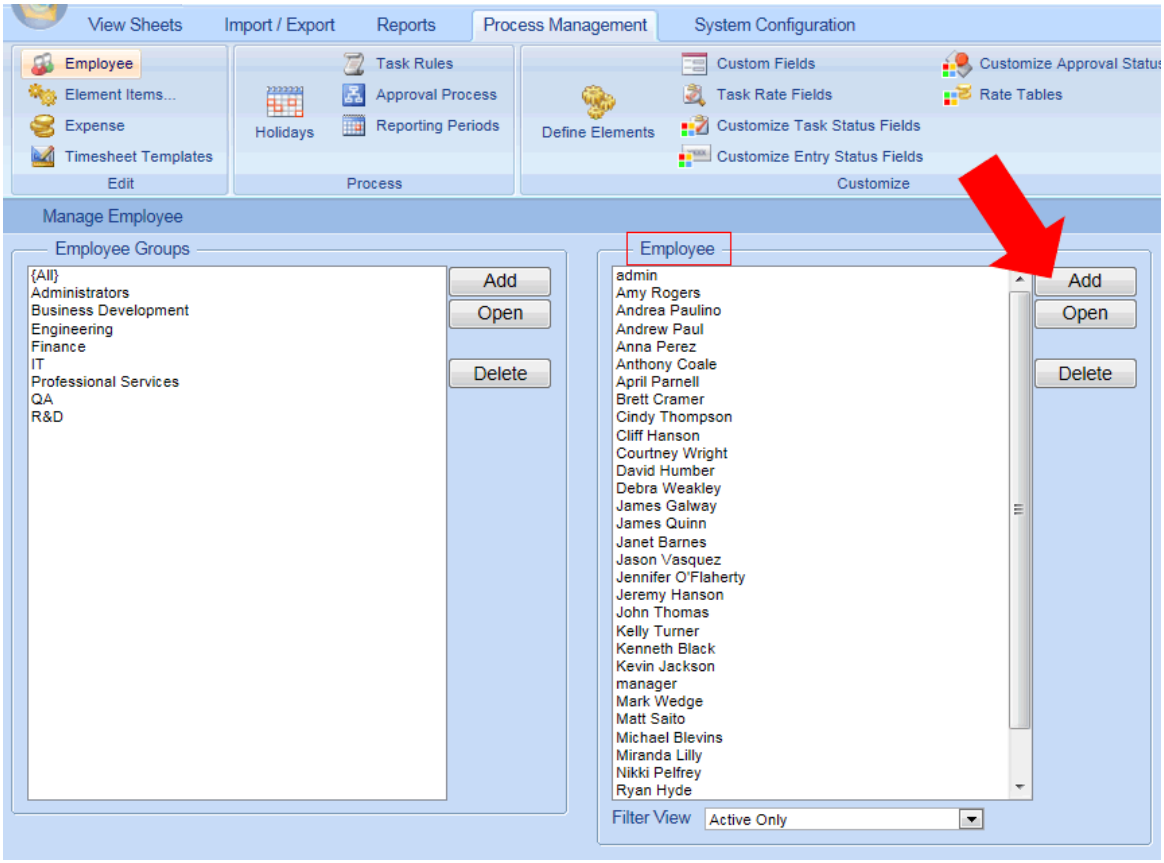
1. Log into Office Timesheets if you have not done so already.
2. Click on the **Process Management** tab.



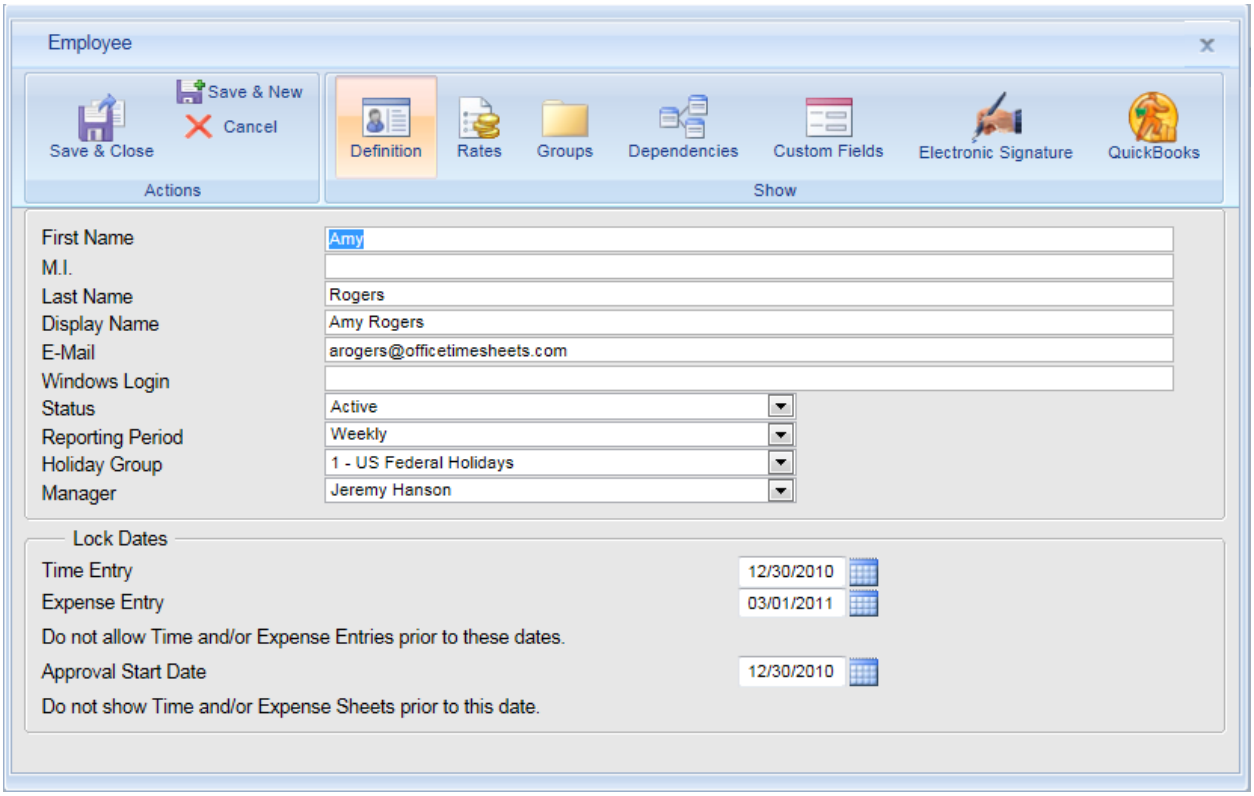
3. From the Process Management section; click on the **Employee** icon found in the Edit ribbon group.



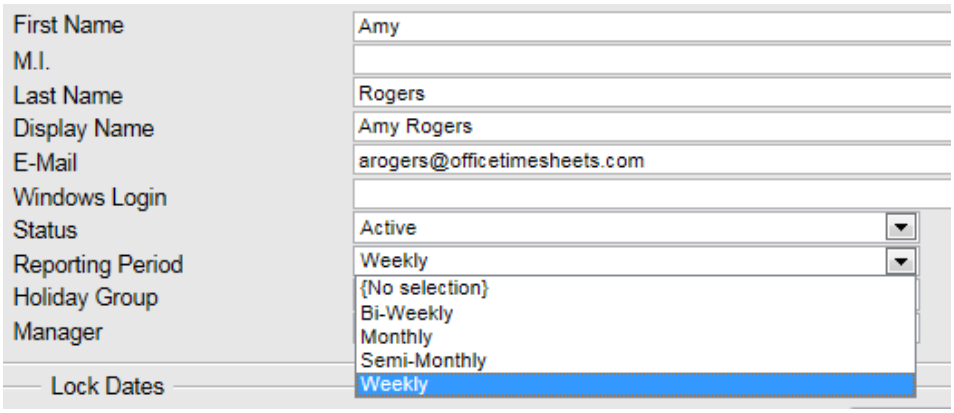
4. From the **Manage Employee** page, click on the **Add** button in the **Employee** form group.



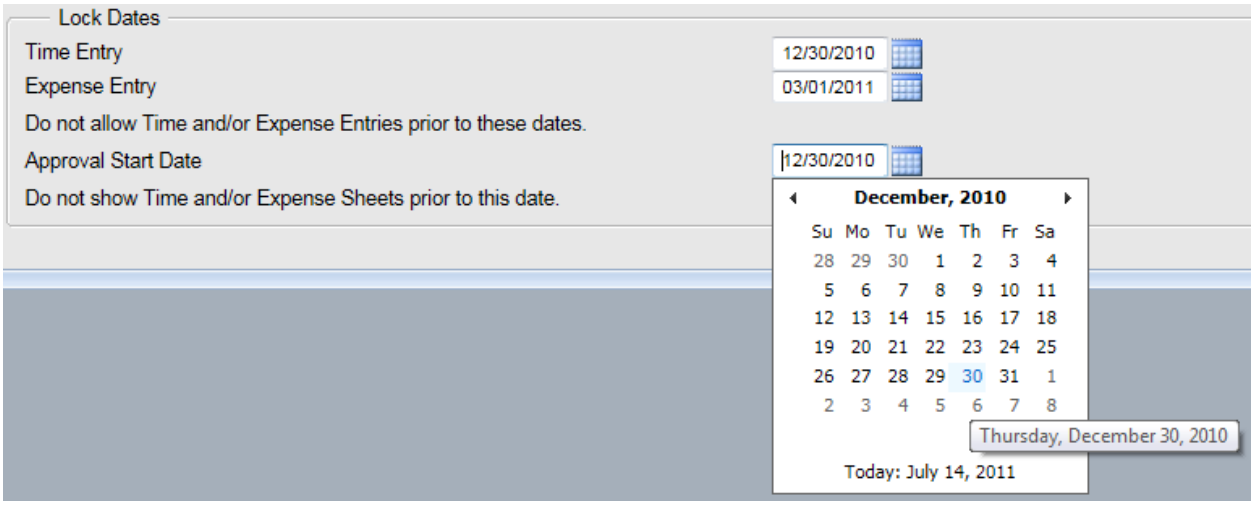
5. Type in the First Name, Middle Initial, Last Name and email address of the employee you wish to add.



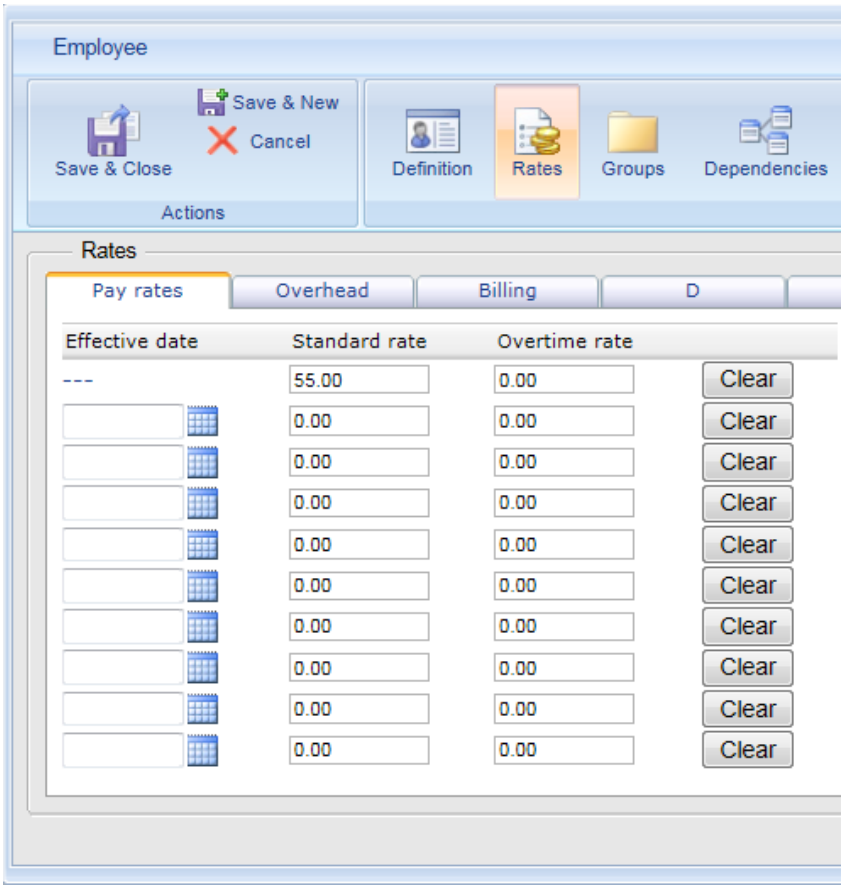
6. Select the reporting period for which the selected employee will be reporting time. (Note: you can define an unlimited number of Reporting Periods within Office Timesheets.)



7. Under **Lock Dates**, select the starting dates for time entry and expense entry using the **Time Entry** and **Expense Entry** date fields. Office Timesheets will not allow time and/or expense entries prior to the date selected. Also, if you will be using Office Timesheets approval process you'll need to tell Office Timesheets when the approval process will start for this particular employee using the **Approval Start Date** date control field.



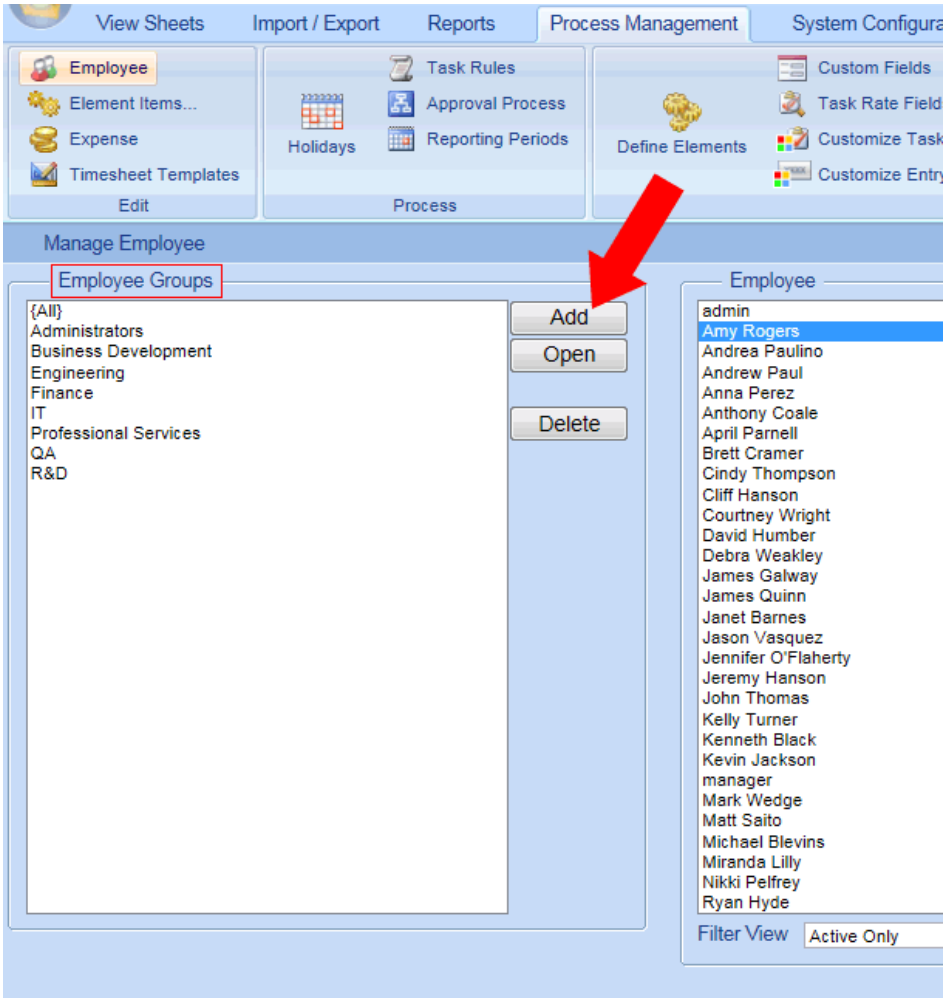
8. Next, click on the **Rates** Show Panel in the Employee dialog to define rates for the selected employee.



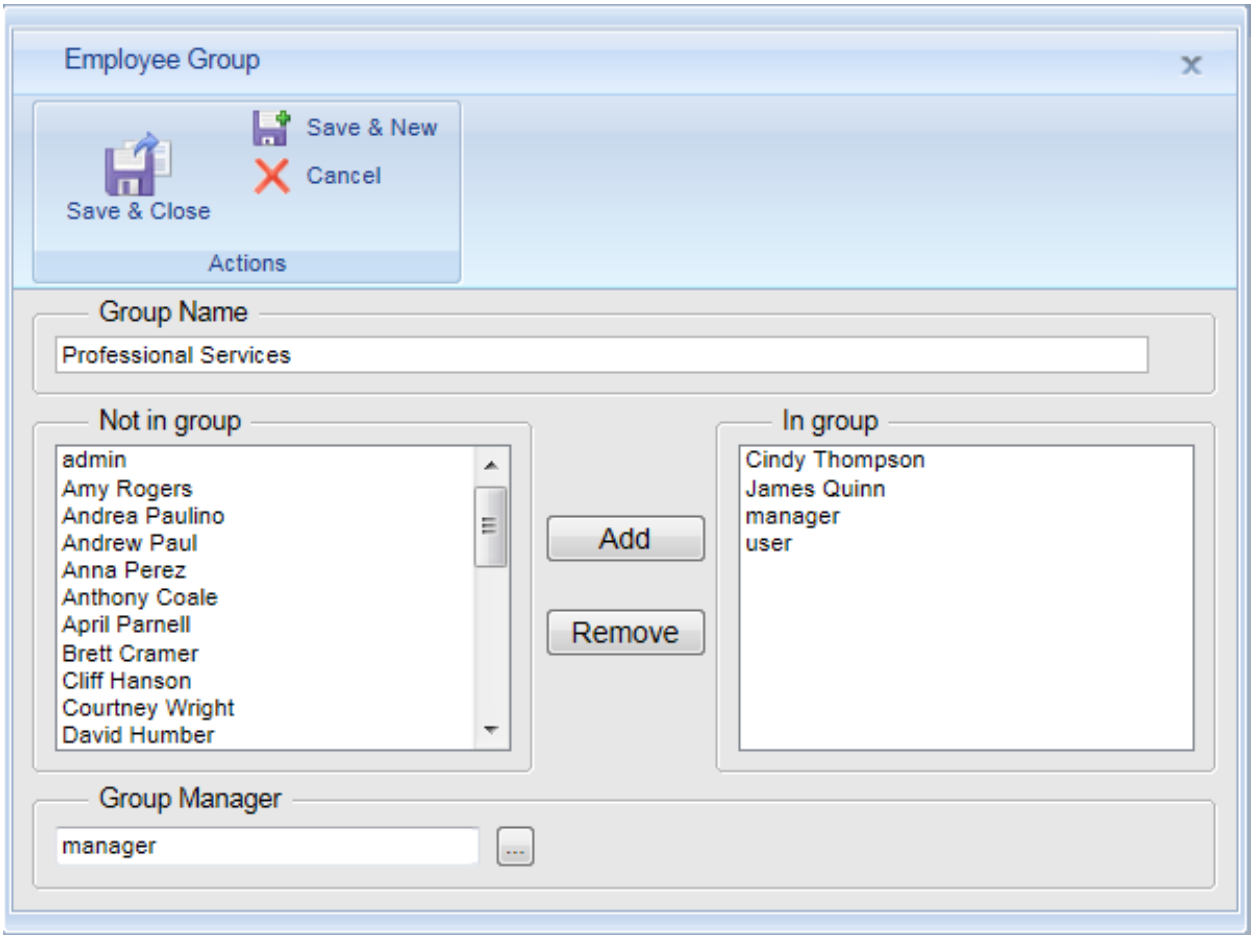
9. Click the **Save & New** icon to create additional employees. Once you've finished adding employees click on the **Save & Close** icon.

Add Employee Groups

1. From the **Manage Employee** form, click on the **Add** button in the **Employee Groups** page grouping.



2. Type in the name you wish to label the group; select the employees you wish to be included within the group and click the **Add** button to place them **In group**; and select a Group Manager (required if using approvals for the selected group of employees) for the selected group.



3. Click the **Save & New** icon to create additional employee groups. Once you've finished adding employee groups click on the **Save & Close** icon.

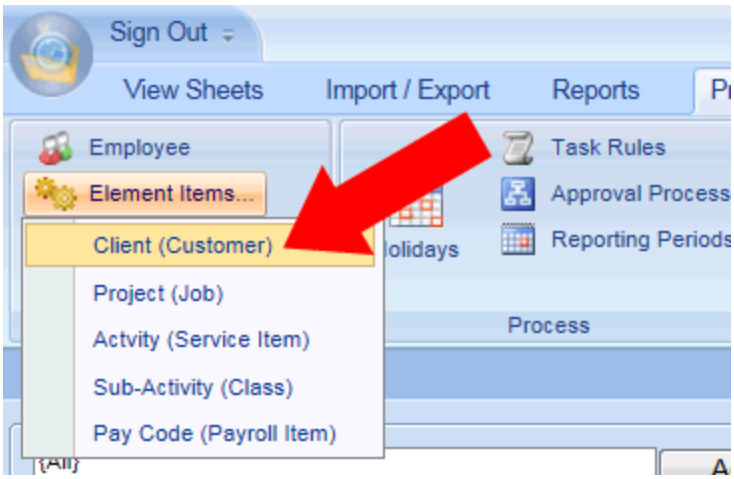
Element Items and Element Item Groups

Task elements (often referred to as time tracking buckets) are the building blocks of tasks within Office Timesheets. As was mentioned previously, ten element levels may be defined within Office Timesheets. By default, 5 element levels are pre-defined within Office Timesheets: Client, Project, Activity, and Sub-Activity and Pay Code.

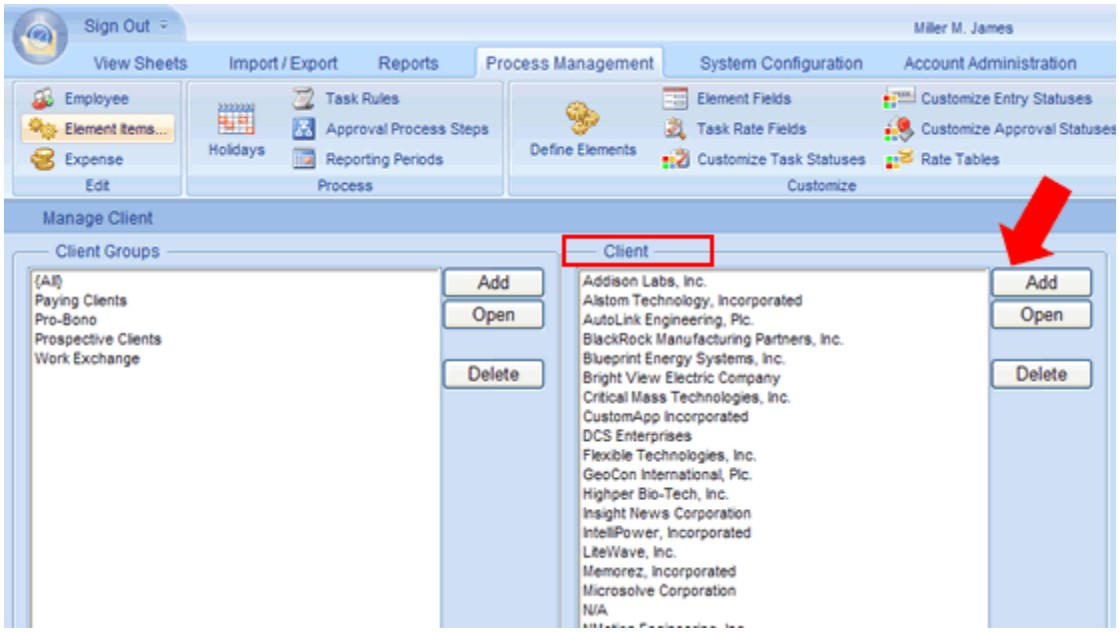
Once your task element levels are defined, element items are created at each element level, which will then allow you to define tasks.

Adding Element Items

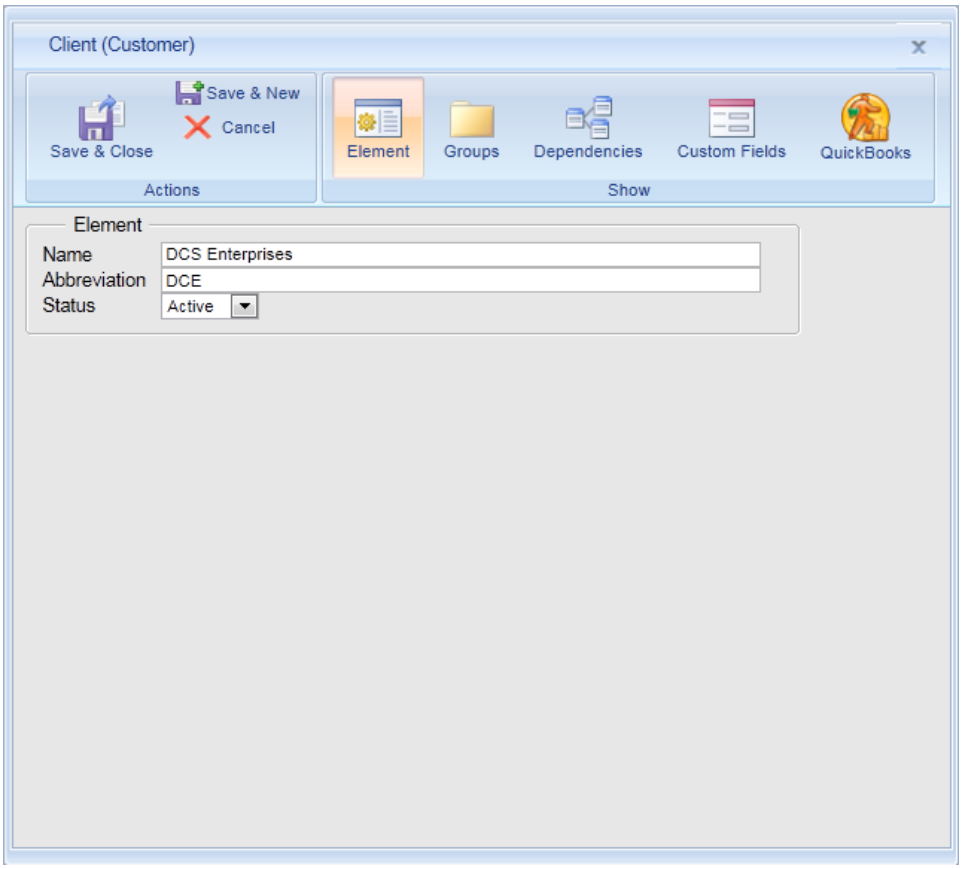
1. Click on the **Process Management** tab, then click on the **Element Items** icon in the **Edit** ribbon group; select the element level in which you wish to add items from the dropdown menu.



2. From the **Manage** {**Element Level Name**} page, click on the **Add** button in the {**Element Level Name**} page grouping. In the example below we've click on the **Client** element level which opens the **Manage Client** page.



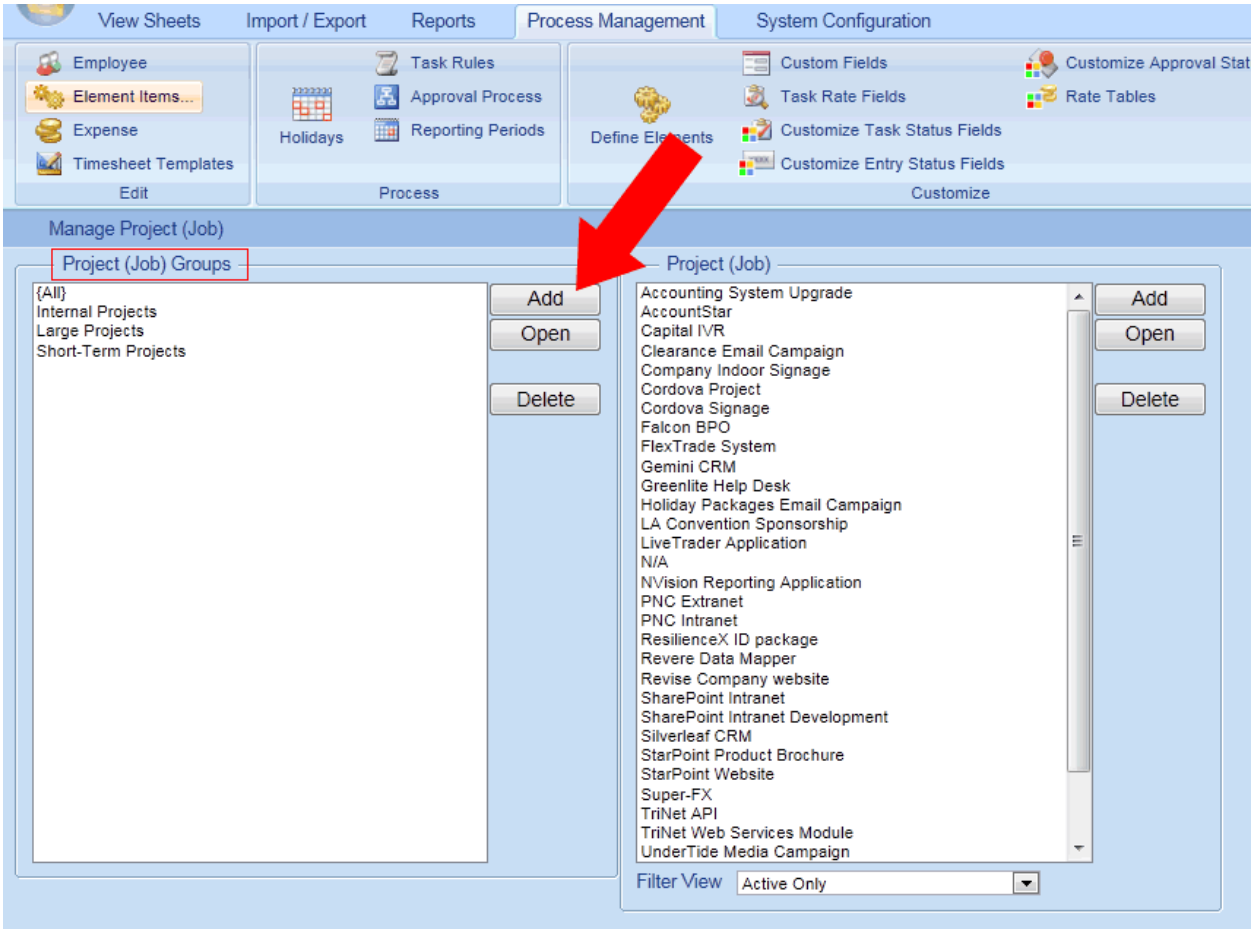
3. Type in a name, abbreviation, and status for the selected element items.

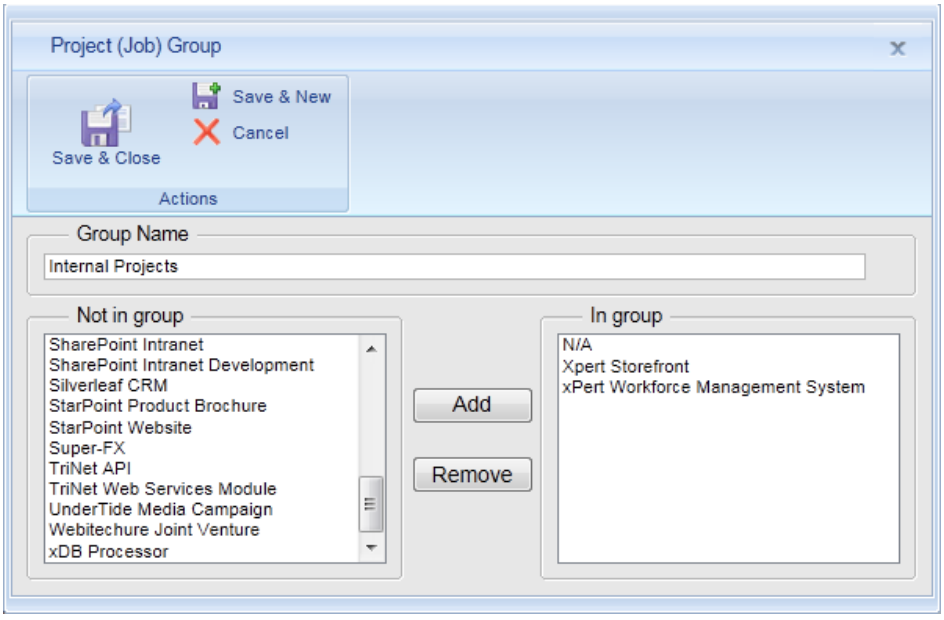


4. Click the **Save & New** icon to create additional element items at the selected element level. Once you've finished adding element items at the selected element level click on the **Save & Close** icon.
5. Repeat the above steps to add element items at other element levels.

Add Element Item Groups

Just like employee groups, each task element level allows for the creation of task element groups. The process for creating task element groups is identical to creating employee groups as previously described.


View Sheets
Import / Export
Reports
Process Management
System Configuration
Employee
Element Items...
Expense
Timesheet Templates
Edit
Holidays
Task Rules
Approval Process
Reporting Periods
Process
Define Elements
Custom Fields
Task Rate Fields
Customize Task Status Fields
Customize Entry Status Fields
Customize Approval Stat
Rate Tables
Customize
Manage Project (Job)
Project (Job) Groups
{All}
Internal Projects
Large Projects
Short-Term Projects
Add
Open
Delete
Project (Job)
Accounting System Upgrade
AccountStar
Capital IVR
Clearance Email Campaign
Company Indoor Signage
Cordova Project
Cordova Signage
Falcon BPO
FlexTrade System
Gemini CRM
Greenlite Help Desk
Holiday Packages Email Campaign
LA Convention Sponsorship
LiveTrader Application
N/A
NVision Reporting Application
PNC Extranet
PNC Intranet
ResilienceX ID package
Revere Data Mapper
Revise Company website
SharePoint Intranet
SharePoint Intranet Development
Silverleaf CRM
StarPoint Product Brochure
StarPoint Website
Super-FX
TriNet API
TriNet Web Services Module
UnderTide Media Campaign
Add
Open
Delete
Filter View
Active Only


Project (Job) Group
Save & New
Cancel
Save & Close
Actions
Group Name
Internal Projects
Not in group
SharePoint Intranet
SharePoint Intranet Development
Silverleaf CRM
StarPoint Product Brochure
StarPoint Website
Super-FX
TriNet API
TriNet Web Services Module
UnderTide Media Campaign
Webitechure Joint Venture
xDB Processor
Add
Remove
In group
N/A
Xpert Storefront
xPert Workforce Management System

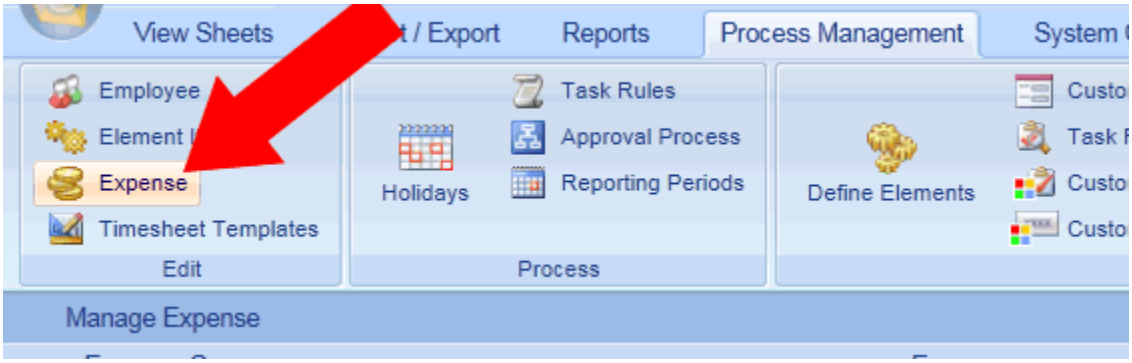
Expense Items and Expense Item Groups

NOTE: If you do not wish to track activity-related expenses in Office Timesheets then you skip this section.

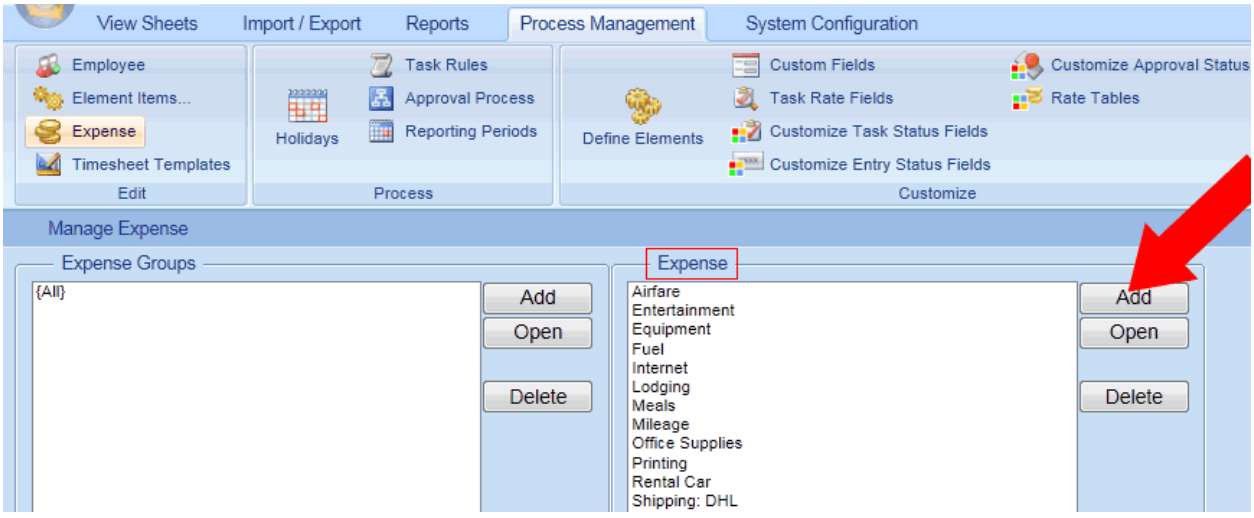
Office Timesheets also allows users to track expenses. Expense codes are special element items that are only available when creating expenses.

To create an expense item

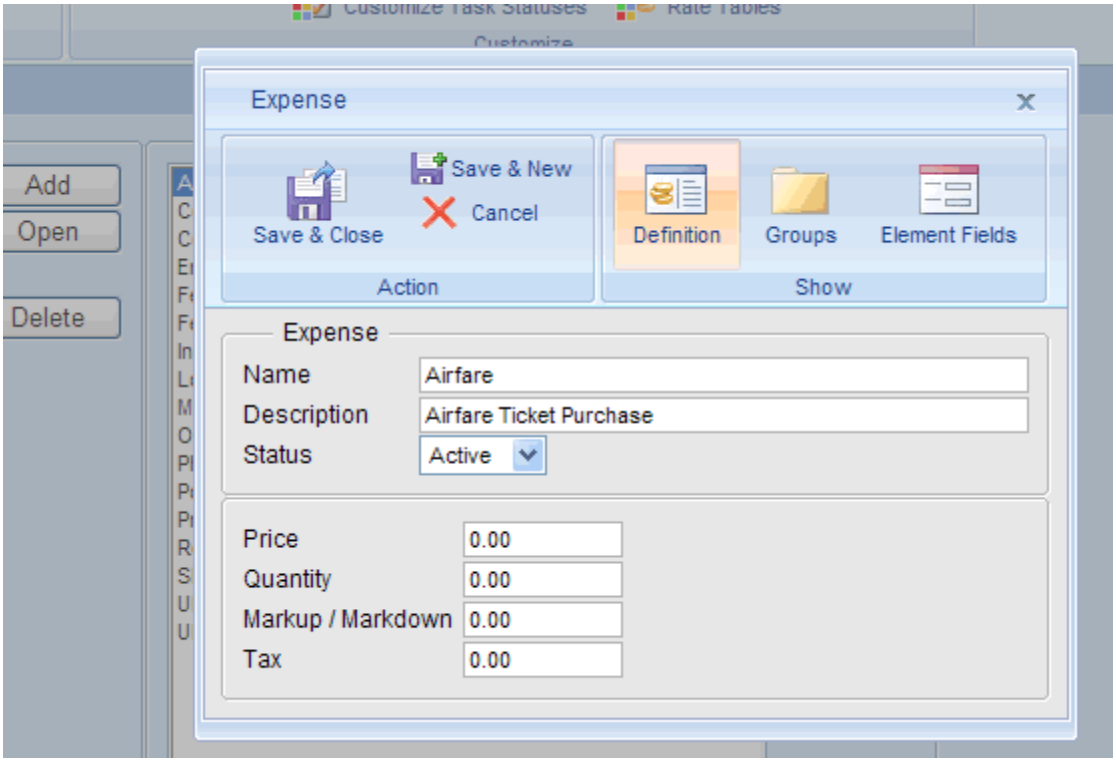
1. Click on the **Process Management** tab; then click on the **Expense** icon in the **Edit** ribbon group.



2. From the Manage Expense form, click on the **Add** button in the Expense form grouping.



3. Type in a name and description of your new expense item; then enter a default Price, Quantity, Markup/Markdown, and Tax rate (these values are optional and can be left blank whereby the actual value for these fields will be entered by a timesheet user at the time of recording an expense entry).



4. Click the **Save & New** icon to create additional expense items. Once you've finished adding expense items click on the **Save & Close** icon.

Expense Groups

Expense items may be organized into groups just like employees and element items. For example, you might create an Expense Group named "Travel & Entertainment" to categorize all travel & entertainment related 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.

Populating Employee Timesheets with Tasks

Tasks are the basic foundation of time and expense entries within Office Timesheets. A task is a combination of element items that describe work that is performed by an employee. As mentioned previously, Office Timesheets enables you to configure up to 10 Task Tracking Levels (called Element Levels). Office Timesheets is initially setup with 5 element levels: Client, Project, Phase and Sub-Task. At each of these element levels, element items are defined (client names, project names, activities, sub-activities and pay codes). For example, using this sample task element hierarchy, a task might look like:

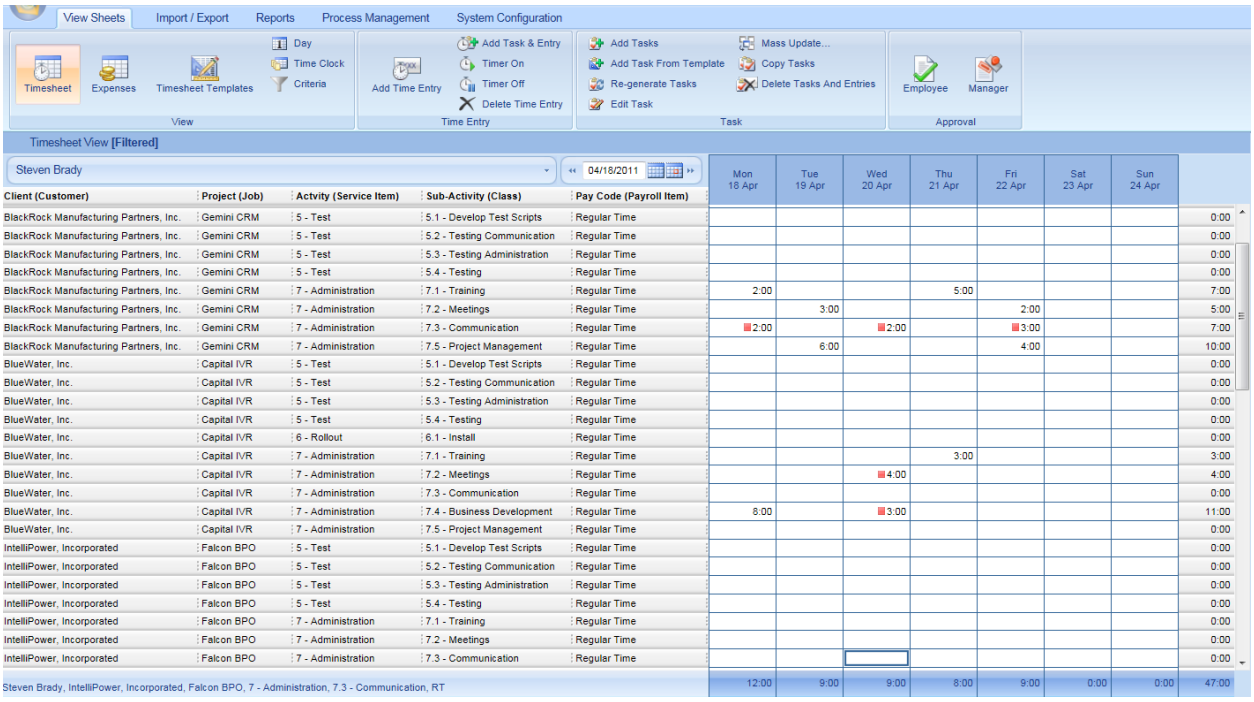
Client ABC | Project 123 | Activity 1| Sub-Activity 1.a | Regular Time

So let's break this down…

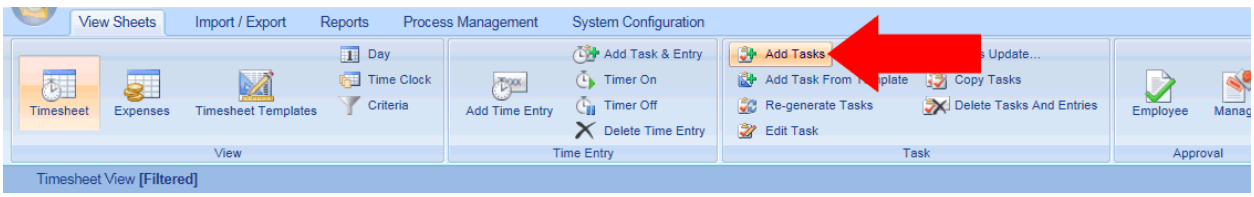
- **Client ABC** = the client for which the employee is performing work.
- **Project 123** = the project in which the employee is working on…(here, your company may have a client in which you work on 20 different projects…Project 123 would represent the specific project in which work is being performed).
- **Activity 1** = the activity that the employee is performing for the client and project.
- **Sub-Activity 1.a** = the sub-activity activity that the employee is performing for the client and project.
- **Regular Time** = the pay tracking code for the work performed by the employee.

To add tasks to employee timesheets

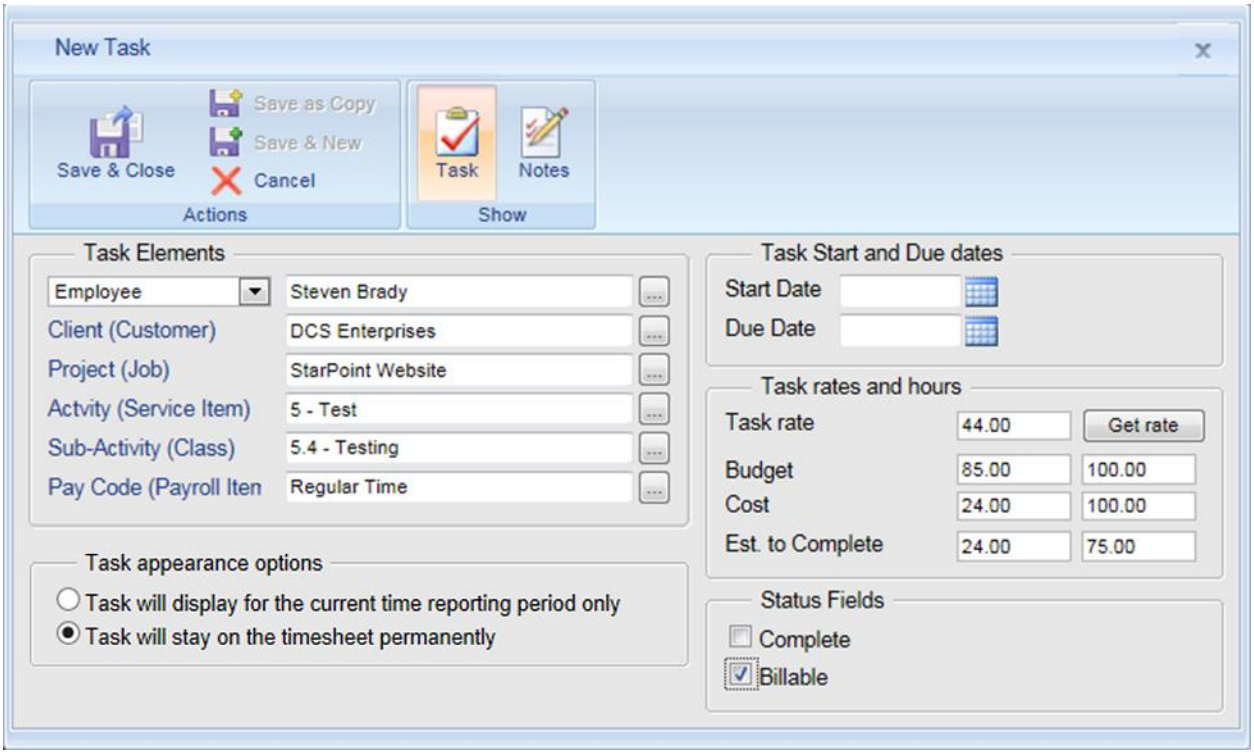
1. Click on the **View Sheets** tab; then click on the **Timesheet** icon in the **View** ribbon group.



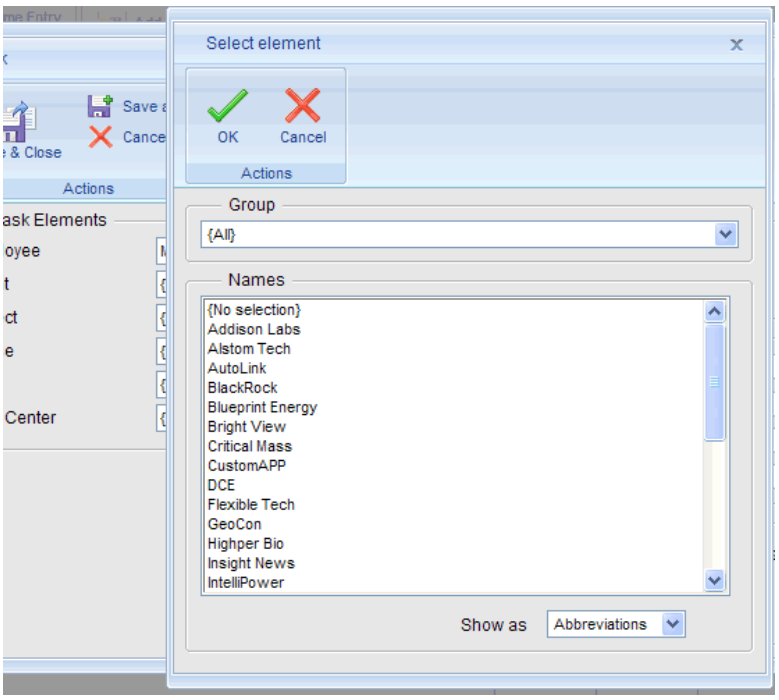
2. Next, click on the **Add Tasks** icon in the **Task** ribbon group.



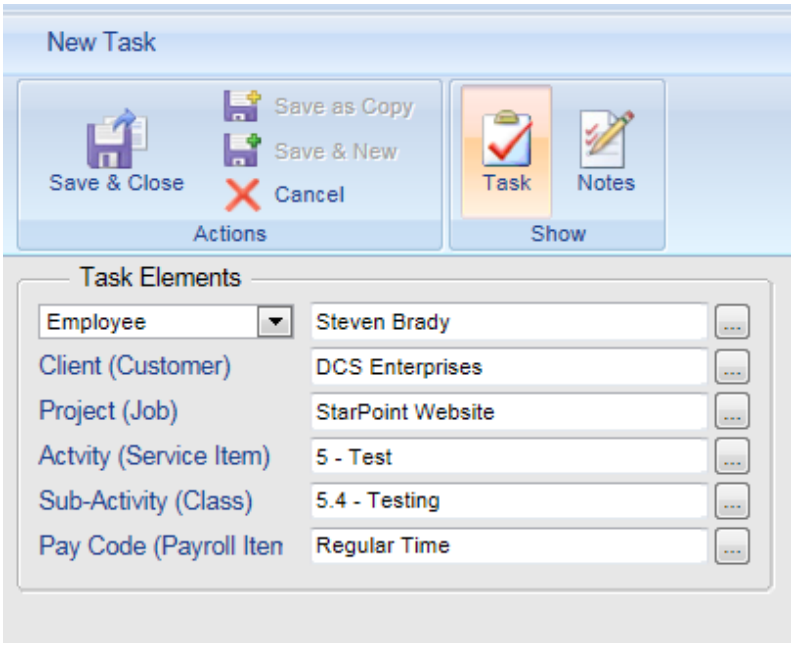
3. From the **New Task** dialog make the element selections needed to create your task; and fill in other optional task details such as Task Start and Due dates, Task Rates and Hours, and Task Status Selections.



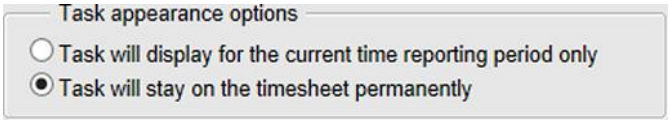
Selecting Element Names



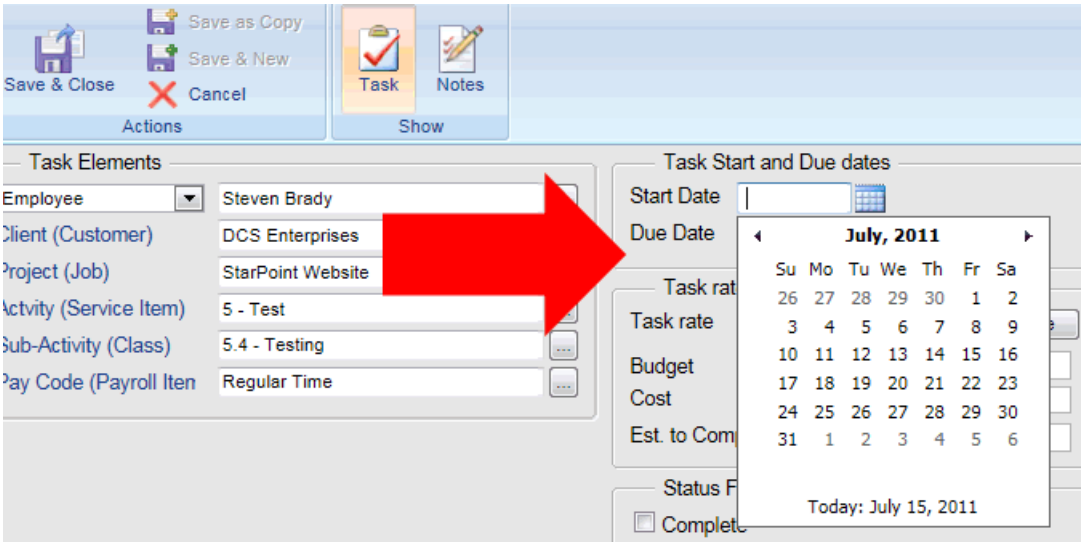
All Element Names selected that are needed to create the desired task



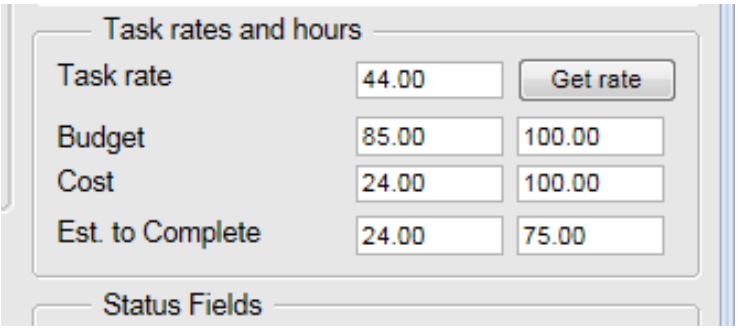
Selecting task appearance options



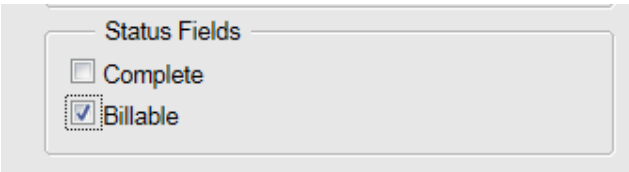
Selecting optional Task Start and Due dates



Entering optional Task Rate, Budget Rate/Hours, Cost Rate/Hours, etc.

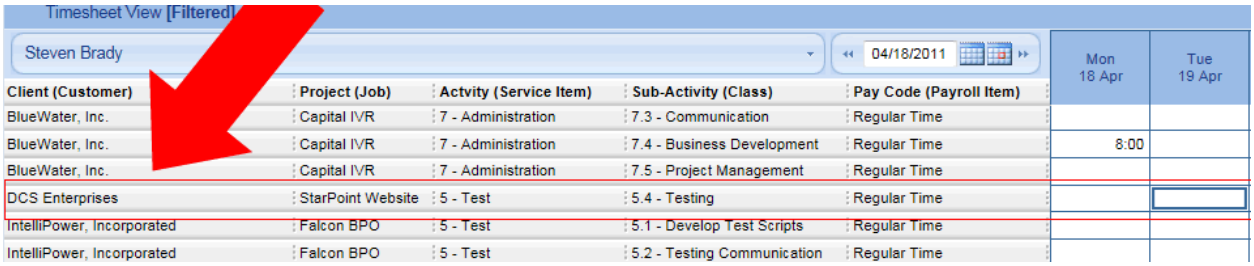


Selecting Optional Task Status



4. Click the **Save & New** icon to create additional tasks. Once you've finished adding tasks click on the **Save & Close** icon.

Tasks will appear on employee's timesheets as illustrated below…



Adding similar tasks to the same timesheet

There are several tools within Office Timesheets that make entering tasks on timesheets faster and easier. One such function is the **Save as Copy** action found within the task dialog. The **Save as Copy** action allows you to open an existing task, make a few minor changes to the task, and then save it as a new task, without removing the original task. Why would you want to utilize such a function? Often, you'll find that you need to create a new task on a timesheet where only one element item is different from an existing task. For example, you may have the following task on an employee's timesheet:

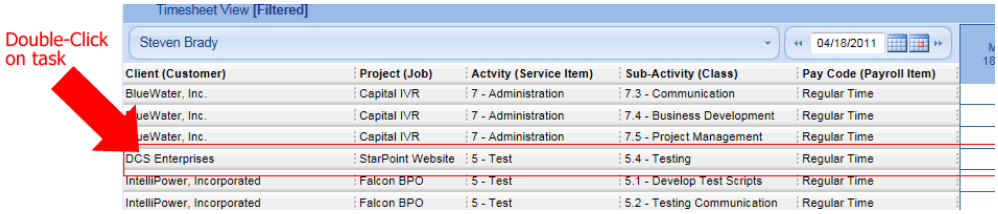
Client ABC | Project 123 | Activity 1 | Activity 1.a | Regular Time

However, the employee may need to have an identical task on his/her timesheet, but with a different sub-activity like **Activity 1.b**. The **Save as Copy** action allows you to simply open the original task and

create this new task on the employee's timesheet quickly by simply changing the selection for the Sub-Activity, and clicking **Save as Copy**.

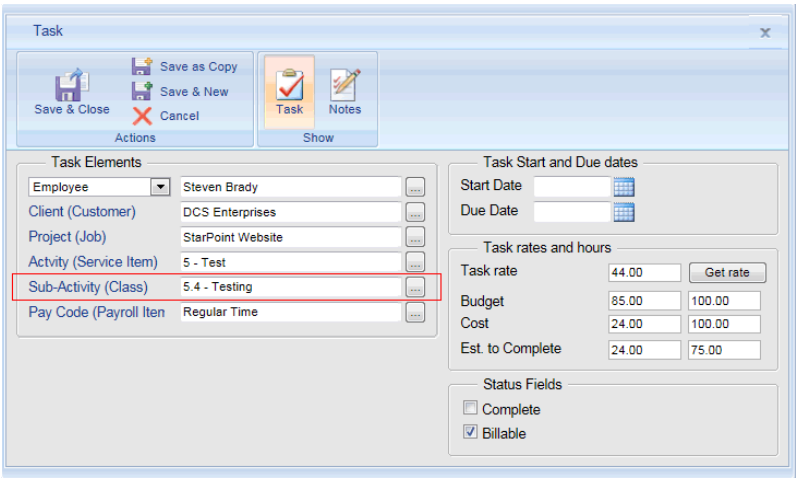
To add new tasks using the **Save as Copy** action:

1. Double-click on the task you wish to use for creating a similar task.

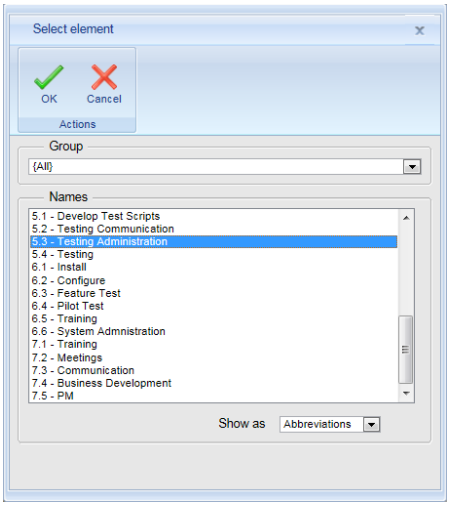


2. Change the properties of the task from within the Task dialog box.

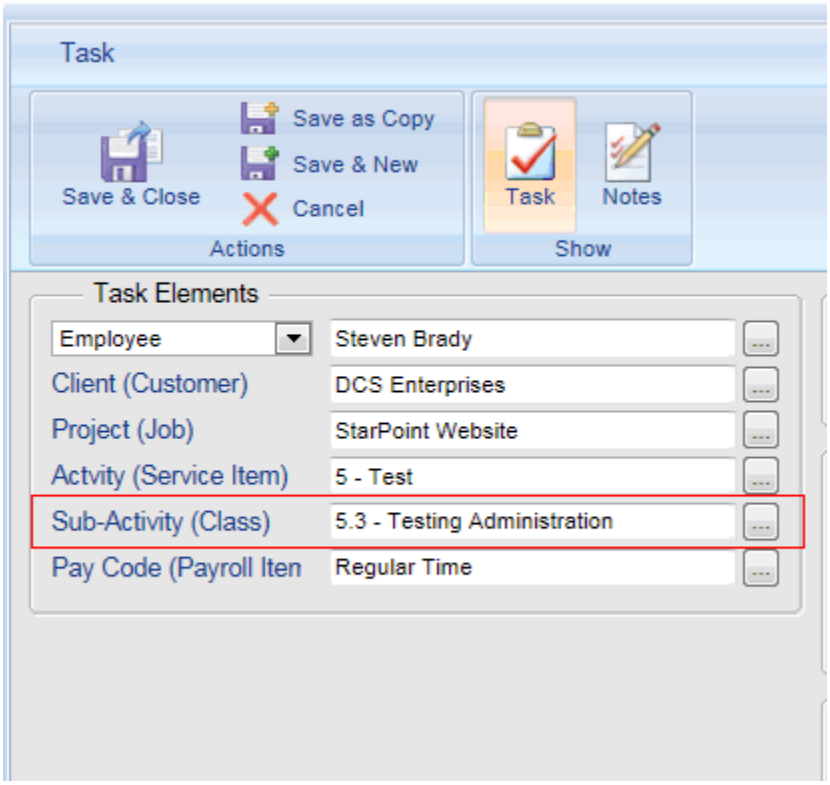
Example 1.1: Changing the task item from Feature Coding to Feature Testing



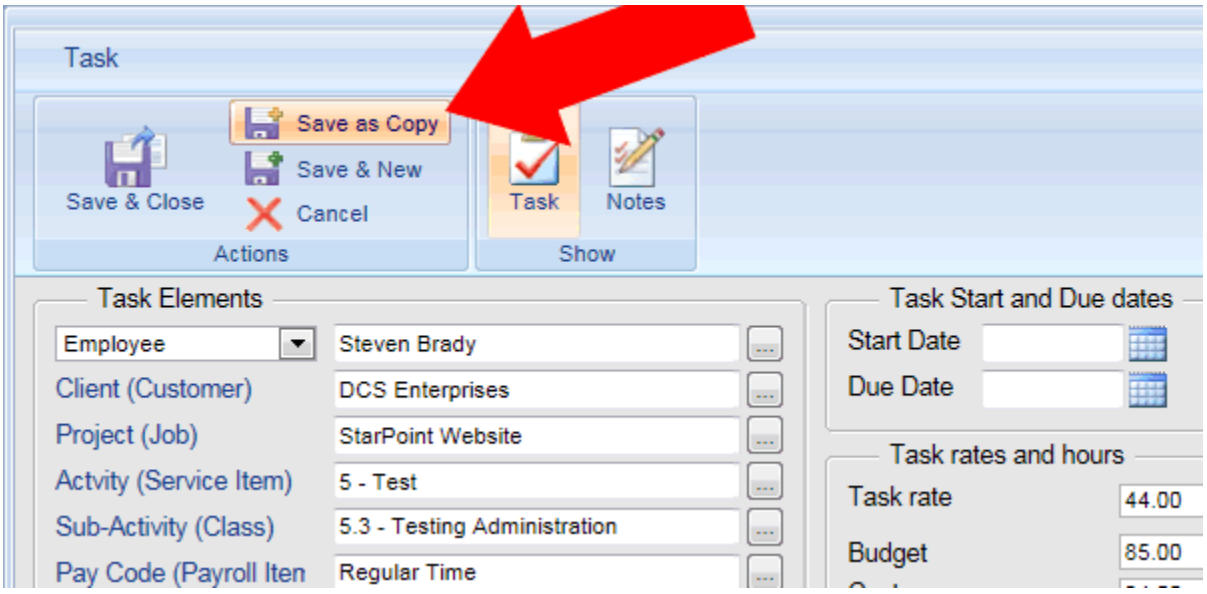
Example 1.2: Changing the task item from Feature Coding to Feature Testing



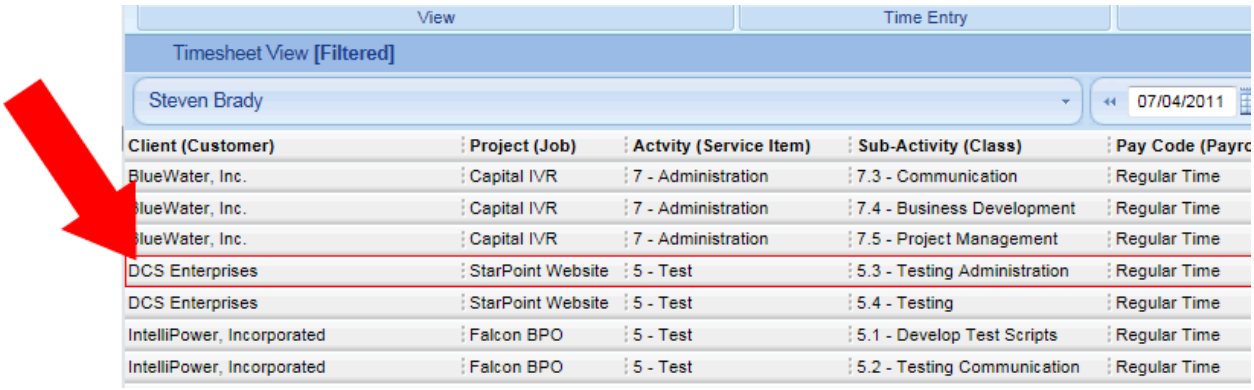
Example 1.3: Changing the task item from Feature Coding to Feature Testing



Example 1.4: Changing the task item from Feature Coding to Feature Testing



The new task is created, while the original task is maintained on the employee's timesheet…

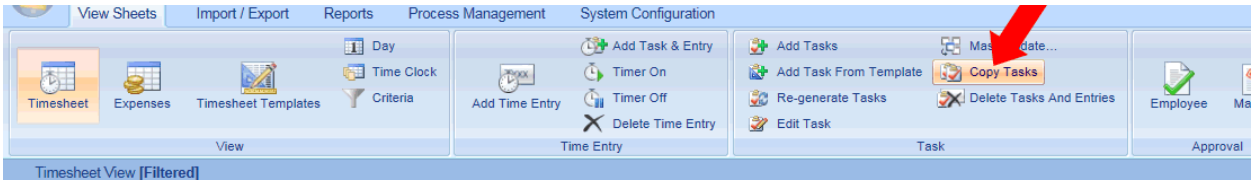


Copy an employee's tasks or entire timesheet to one or more other employees' timesheets

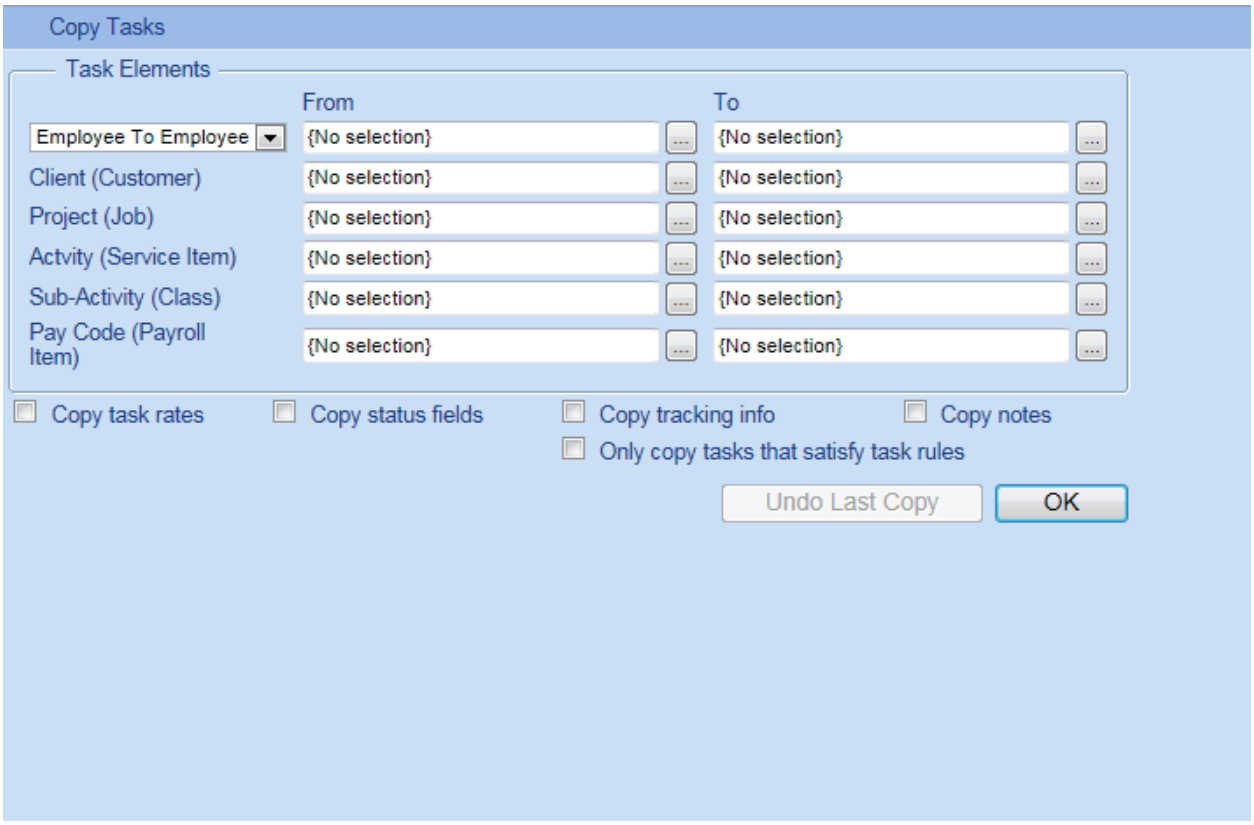
Copy Tasks is another function within Office Timesheets that makes entering tasks on timesheets faster and easier. The Copy Tasks function allows you to copy tasks on one employee's timesheet to one or more other employees' timesheet/s. Why would you want to utilize such a function? Often you'll find that many employees frequently work on the same tasks. The **Copy Task** function allows you to populate employee timesheets using the tasks that have already been creating on other employee (or timesheet templates) timesheets.

To copy tasks:

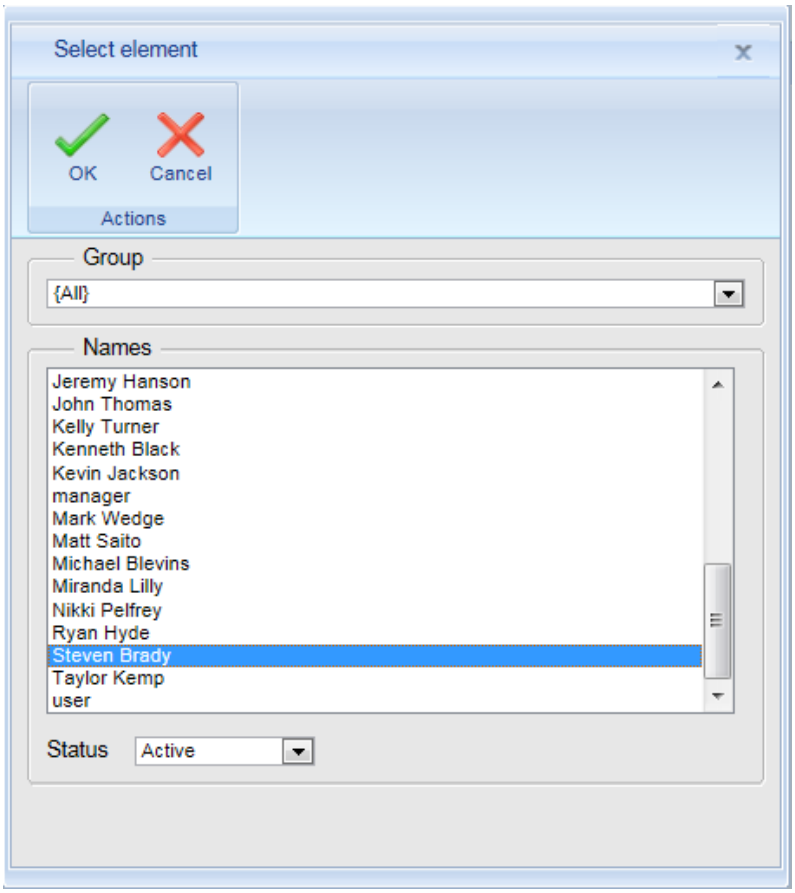
1. Click on the **View Sheets** tab; then click on the **Timesheet** icon in the **View** ribbon group. Next, click on the **Copy Tasks** icon in the **Task** ribbon group.

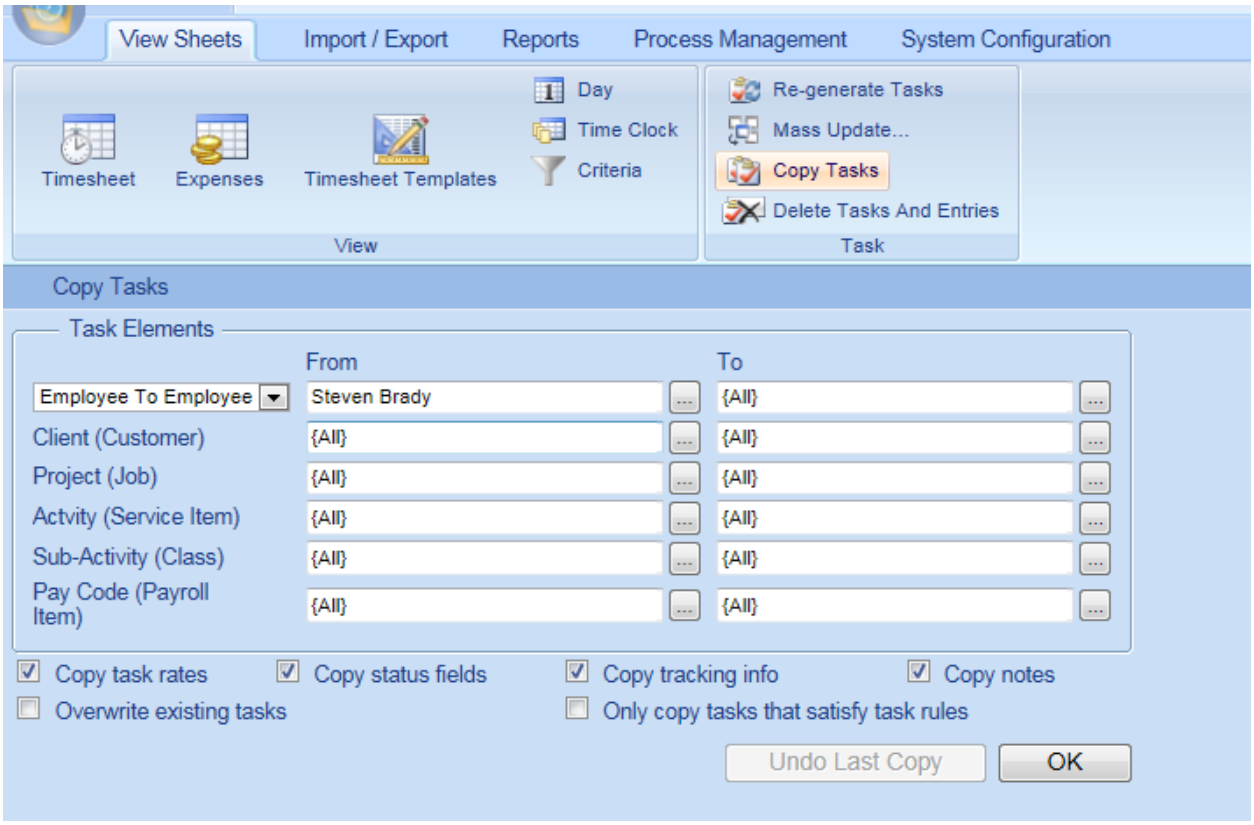


2. From the **Copy Task** dialog, select the element properties you wish to copy over to other employee timesheets in the **From** element selection column; select what you wish to copy…

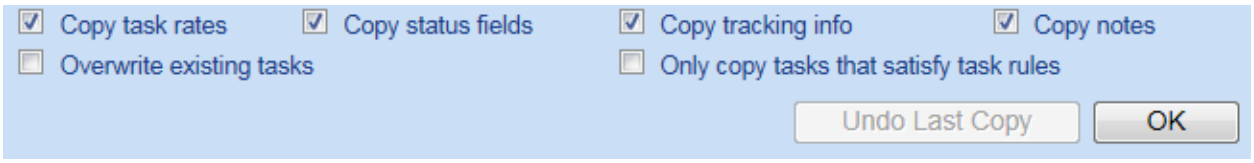


For example, we'll copy all of the tasks on James Miller's timesheet and copy them to all other employees' timesheets in the illustrations below…

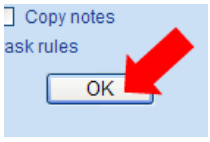

Select element
OK
Cancel
Actions
Group
{All}
Names
Jeremy Hanson
John Thomas
Kelly Turner
Kenneth Black
Kevin Jackson
manager
Mark Wedge
Matt Saito
Michael Blevins
Miranda Lilly
Nikki Pelfrey
Ryan Hyde
Steven Brady
Taylor Kemp
user
Status
Active



3. Select the task properties (task rates, status selections, tracking info, notes) you wish to copy over to other user's timesheets.



4. Once all your copy **To** and **From** selections are made, click **OK**.



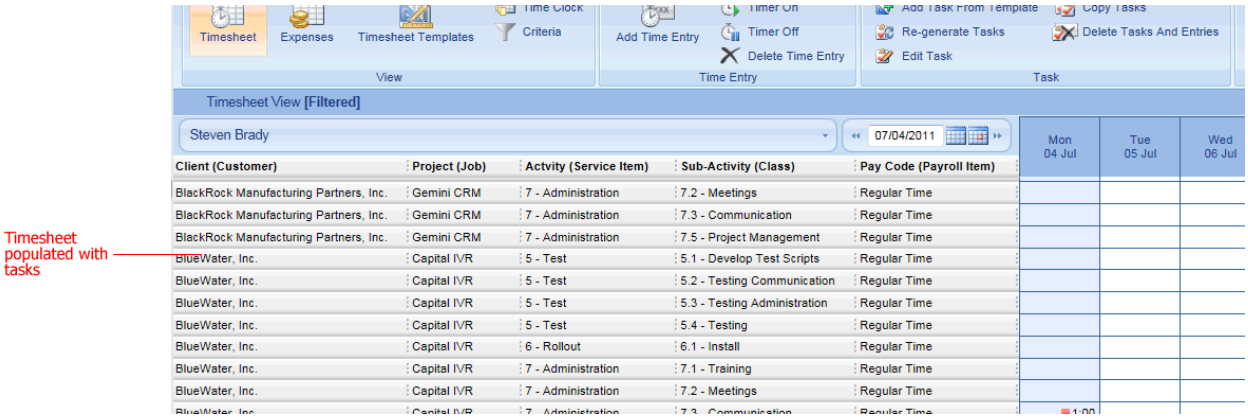
5. A prompt will appear onscreen to notify you of the number tasks that were created/copied; click **OK**.

Entering Time

There are a number of ways to enter time within Office Timesheets. Office Timesheets includes three time entry interfaces for entering and viewing time data: the **Timesheet** view (a traditional spreadsheet style project/task-based entry screen that can display 5, 7, or 10 days at once); the **Day** view (serves several purposes such as non-scheduled on-the-fly task/time entry – the Day View also allows for separate or multiple entries for the same task on the same day); and the **Time Clock** view (a traditional time clock for hourly workers who clock in and clock out throughout various times of the day).

This guide will focus on entering time from the Timesheet entry screen. To navigate to the **Timesheet** view:

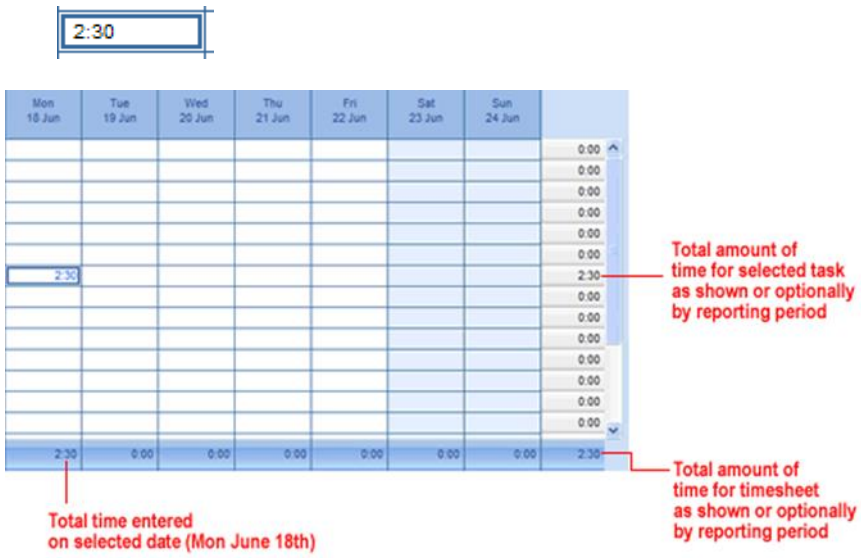
1. Click on the **View Sheets** tab.
2. Click on the **Timesheet** icon in the **View** ribbon group.



From the Timesheet view, there are several ways in which to enter time. One way is to simply enter time directly into a day/date cell (assuming start/stop times are not required from the user).

To enter time directly into the Timesheet View

1. Locate the task you wish to enter time against and click on the intersecting cell with the day/date in which you wish to enter time.
2. Enter the time spent into the cell and press **Enter** or **Tab** on your keyboard.



NOTE: Office Timesheets, by default is configured for time entry using a format of hours:minutes (example 2:30 would be two and one half hours). Office Timesheets may also be configured for entry using a decimal format (example 2.5 would be two and one half hours). This configuration can found in the Time Entry Options by clicking on the System Configuration tab. The time format option can be set by the user or can be enforced via a user's assigned Security Policy.

Note: If viewing multiple employees on the timesheet view the total time will only show on the timesheet view if all employees being displayed have the same Reporting Period.

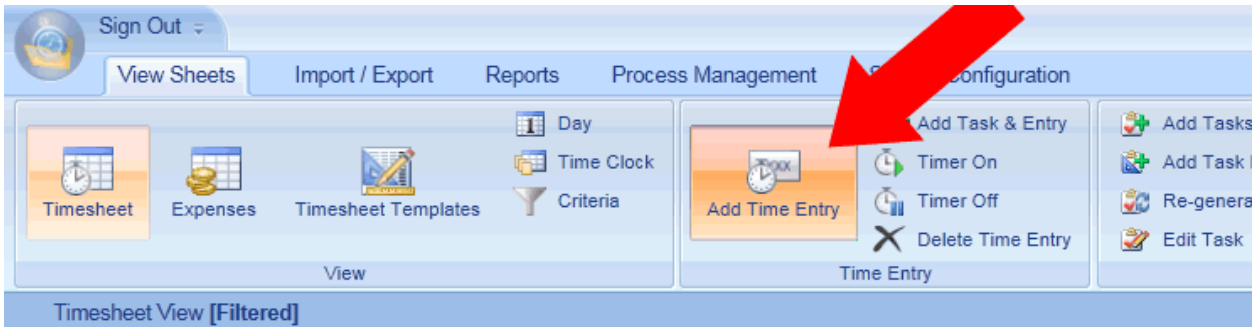
The Timesheet view also allows for time entry via its **Time Entry** dialog.

To enter time from the Time Entry dialog

1. Locate a task you wish to enter time against and double-click on the intersecting cell with the day/date in which you wish to enter time.

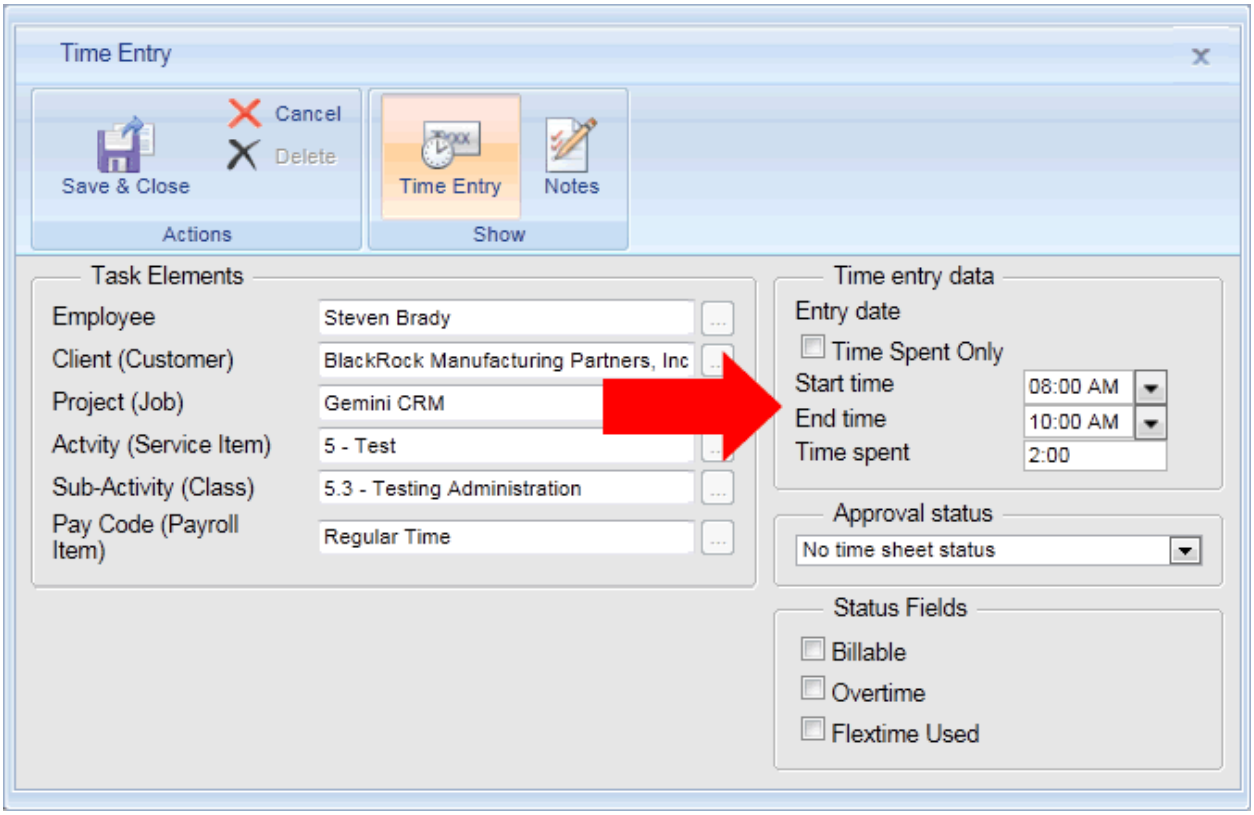
   OR

2. Select the corresponding task entry cell in which to make a time entry and click on the **Add Time Entry** icon in the **Time Entry** ribbon group from the **View Sheets** tab.



a. Enter a Start time and End time (within the Time entry data form grouping).

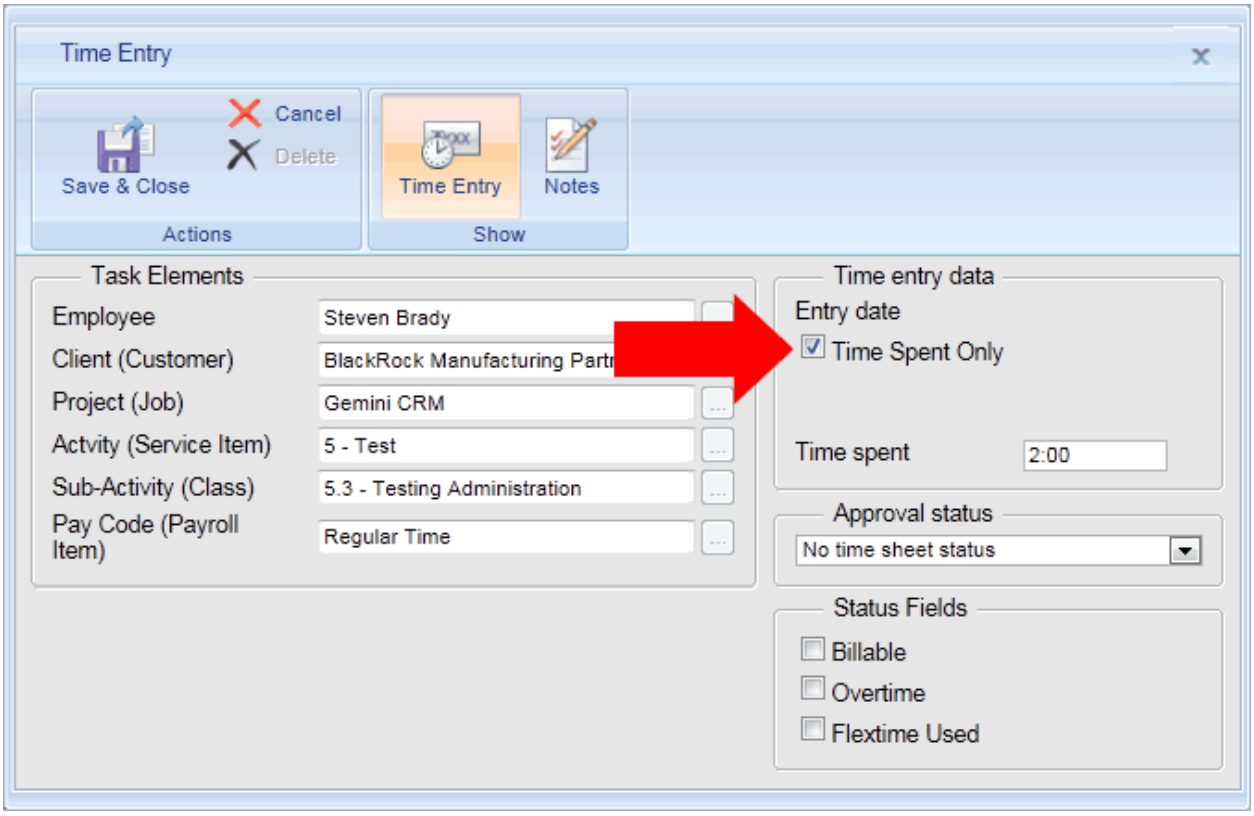
With Start and Stop Time



OR

Select the **Time Spent Only** check box; and enter hours and/or minutes into the Time spent box.

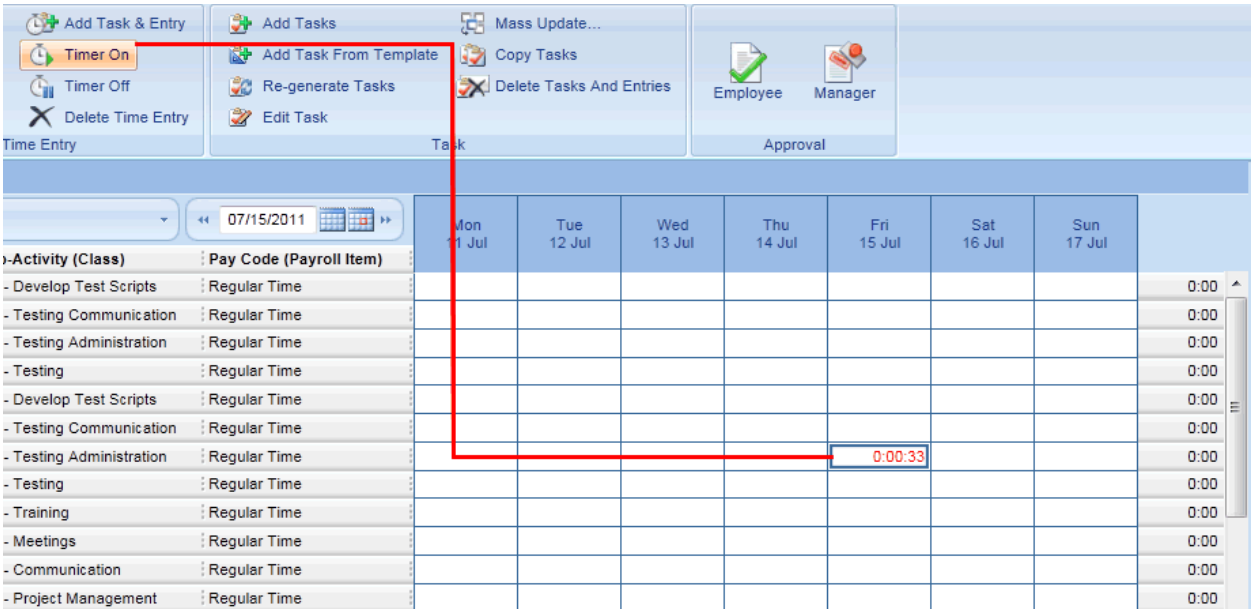
With Time Spent Only



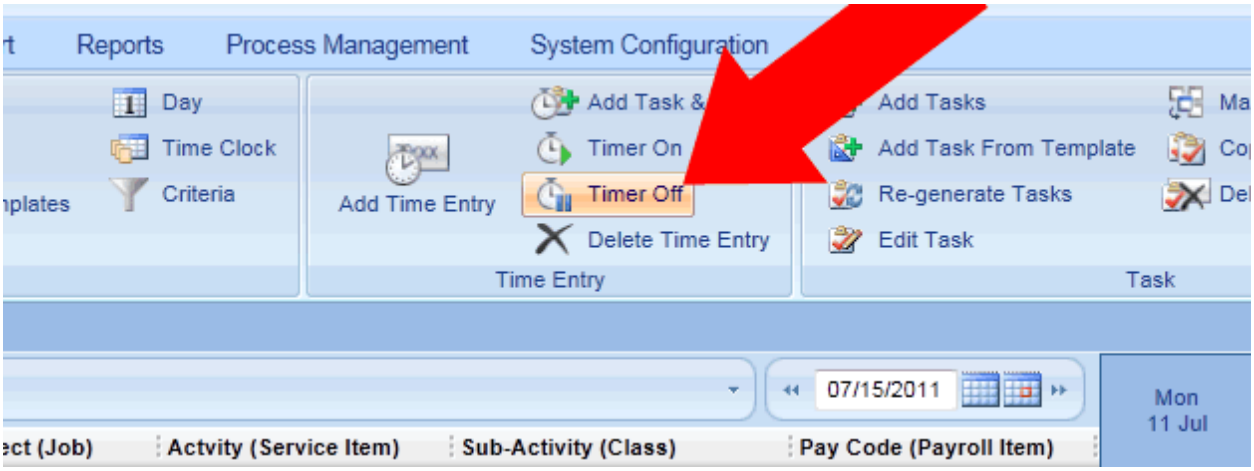
b. Click **Save & Close**.

3. Office Timesheets also provides users with a stop watch timer; designed to keep time while you work. To make a time entry with the stop watch timer…

   a. Click on the **View Sheets** tab.
   b. Select the corresponding task entry cell in which to make a time entry.
   c. Click the **Timer On** icon in the **Time Entry** ribbon group.



d. When your work is complete (or you need to pause the timer), click on the **Timer Off** icon in the **Time Entry** ribbon group.

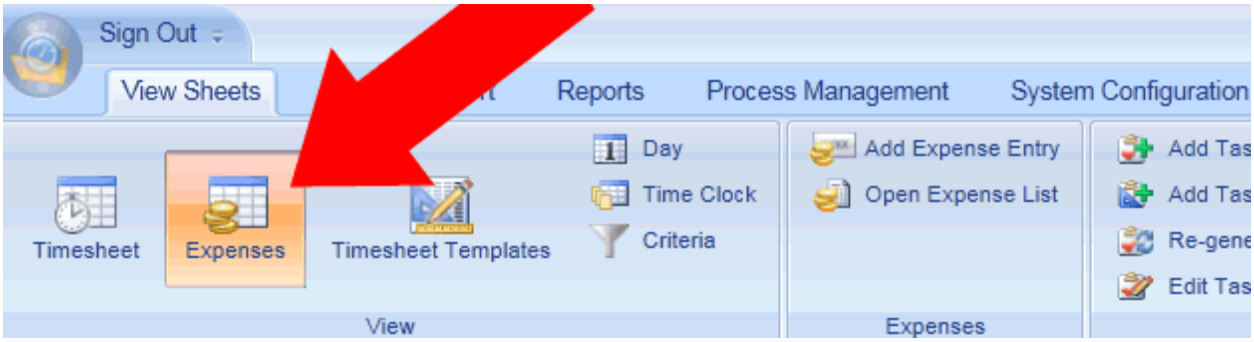


Entering Expenses

Office Timesheets also provides rich functionality for the tracking of expenses. Office Timesheets provides a separate view for tracking expense entries called the Expenses view.

To activate the Expenses View:

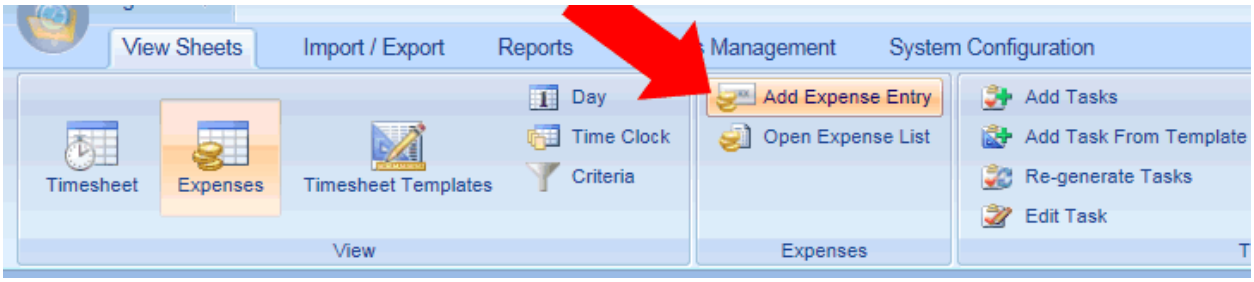
1. Click on the **View Sheets** tab lick on the **Expenses** icon in the **View** ribbon group.



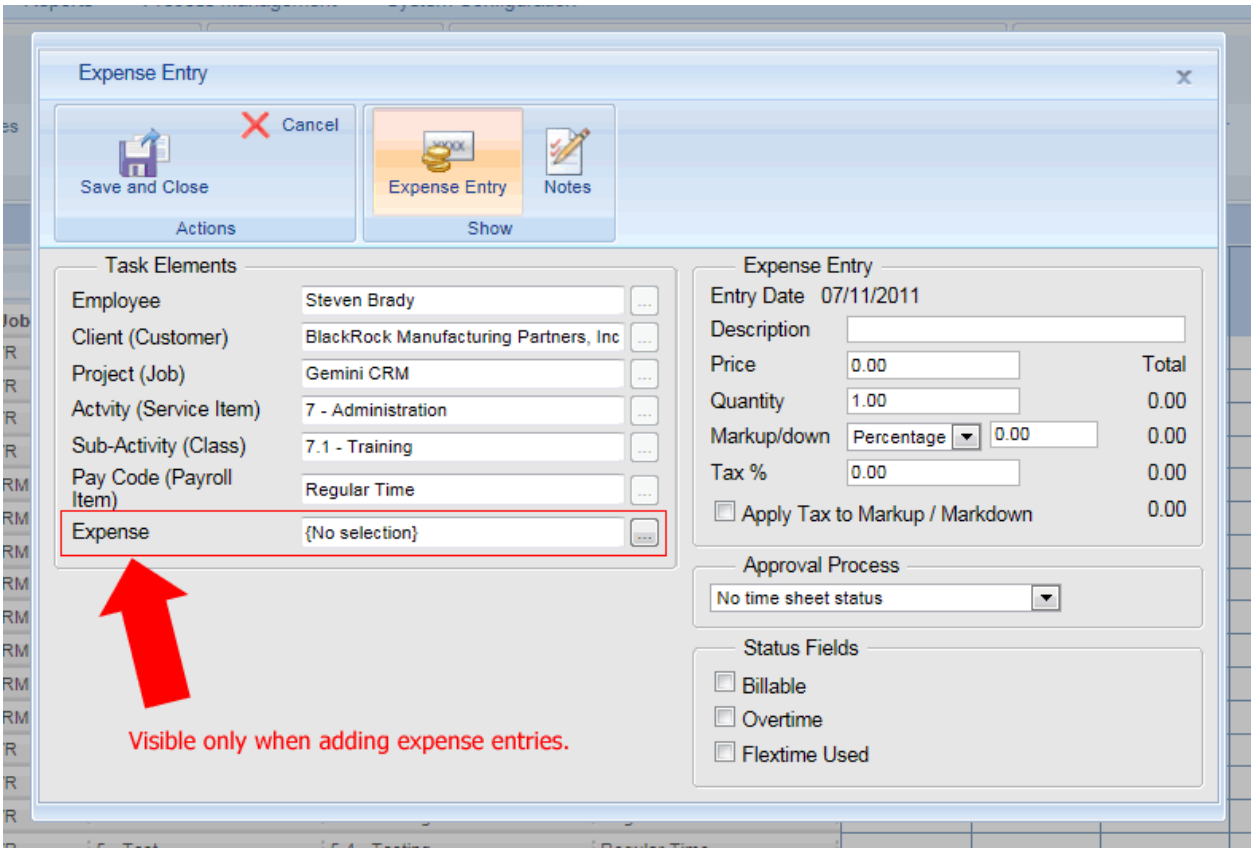
Office Timesheets provides several mechanisms for tracking expense entries as well. The first method is of creating expense is via the Expense Entry dialog box.

To make an expense entry from the Expense Entry dialog

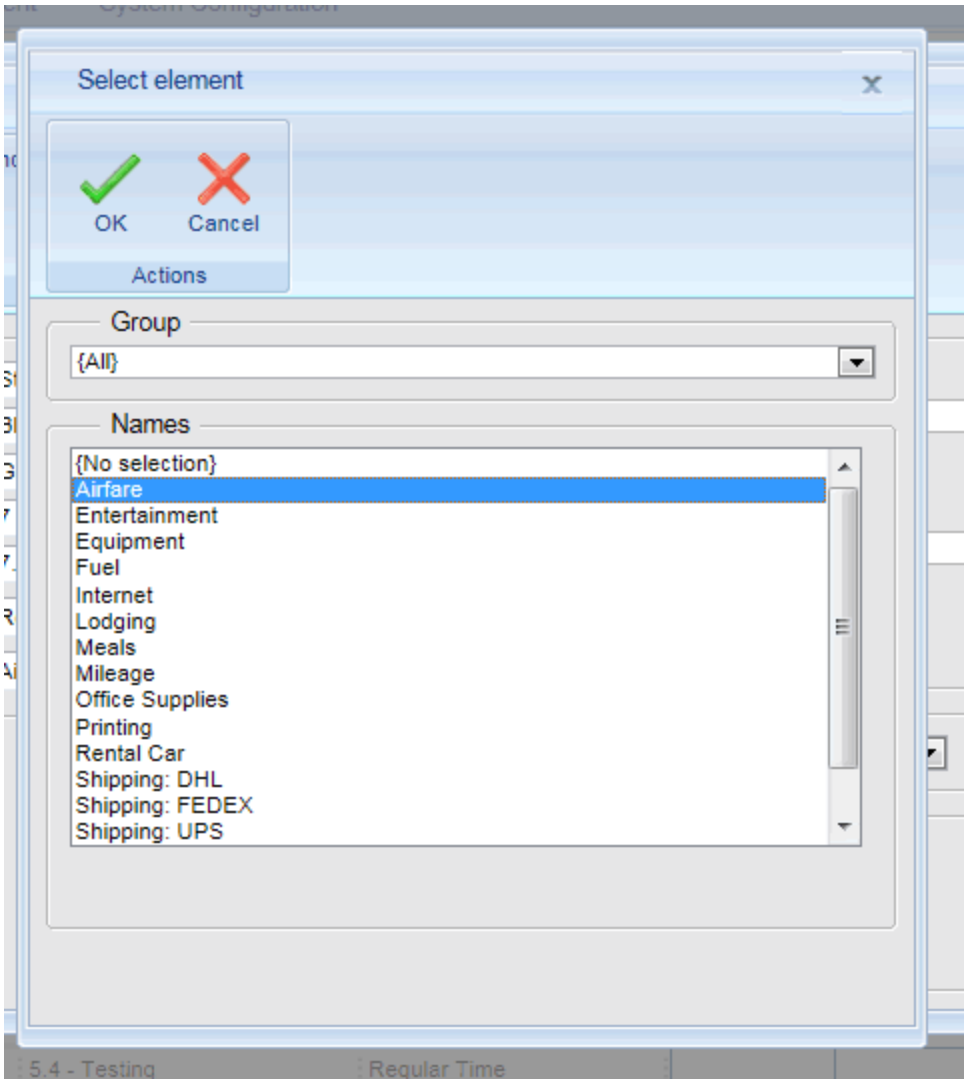
1. Click on the **Expenses** icon in the **View** ribbon group to activate the **Expenses** view.
2. Click on the **Add Expense Entry** icon in the **Expenses** ribbon group.



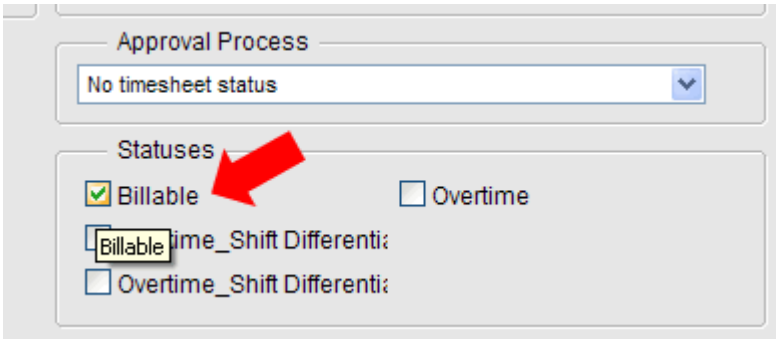
3. Select the task elements you wish to apply to the expense; you'll also notice a new element item: "Expense". The Expense element item is only visible when creating expenses.



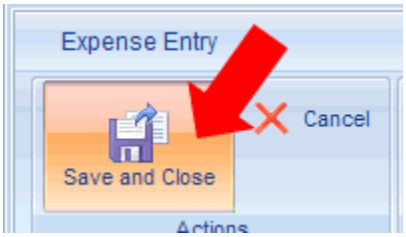
a. Click on the Expense selection button highlighted above.
b. Choose an expense item from the **Select element** dialog box.



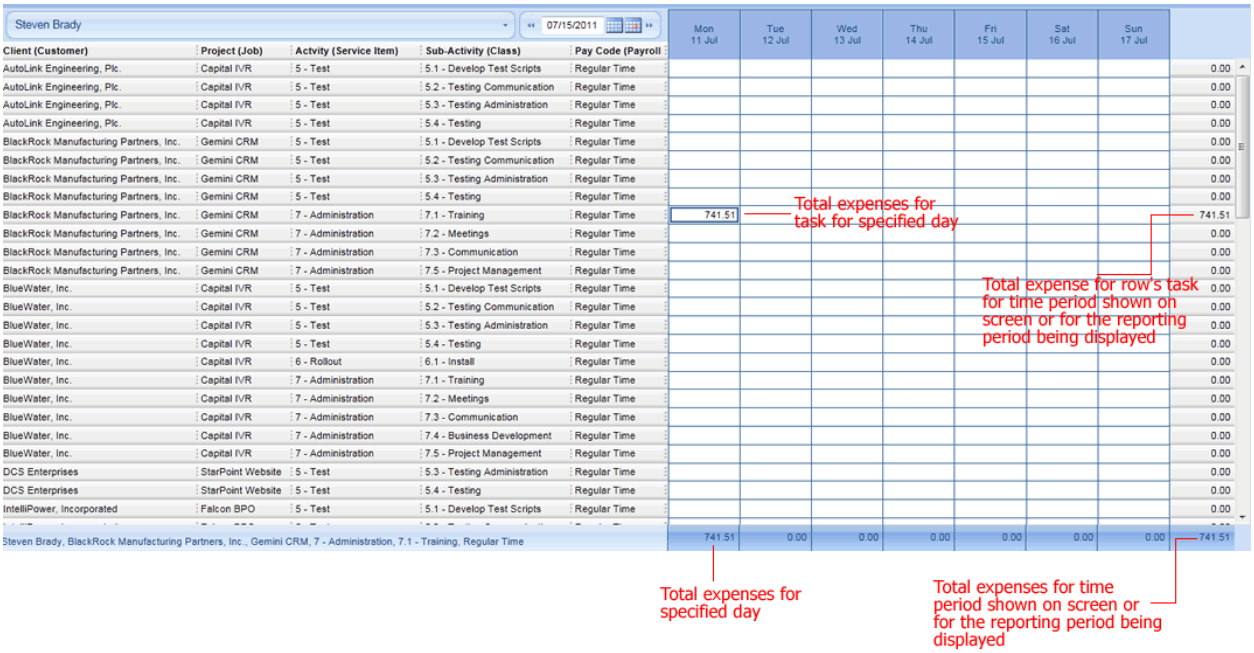
c. Fill in the Expense Entry details as shown below.



4. Click **Save & Close**.



NOTE: The Expenses sheet totals the same as the Timesheet view. See the illustration below…



Submitting Timesheets and Expenses for Approval

Office Timesheets provides a fully customizable approval process for both time and expense entries. The Office Timesheets sample database includes an approval process with 4 steps: Submitted, Rejected, Re-Submitted, Approved and Unapproved.

Your Office Timesheets approval process ties into Reporting Periods. For example, if an employee is assigned a weekly reporting period he/she would submit their timesheet each week.

The Office Timesheets approval process also offers Manager and Employee Notifications for when timesheets are due and/or overdue; as well as employee and manager notification for when an approval step is applied. For example, an employee's manager is notified when his/her reporting employees submit their individual timesheet.

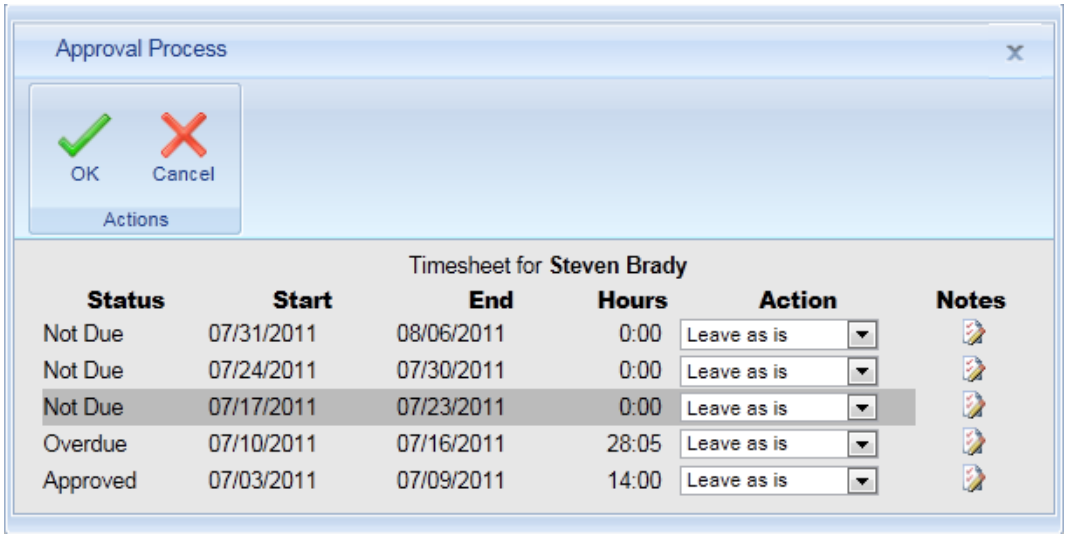
Submitting Timesheets

An employee submits his/her timesheet from the Timesheet view by clicking on the **Employee** icon in the **Approva**l ribbon group. The Approval Process dialog box contains a simple view so the employee can easily see their submitted timesheets, timesheets that are due/overdue, timesheets that are not yet

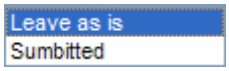
due, timesheet notes and more. The Approval Process dialog also contains an action selection field that allows the employee to submit and/or resubmit his/her timesheet.

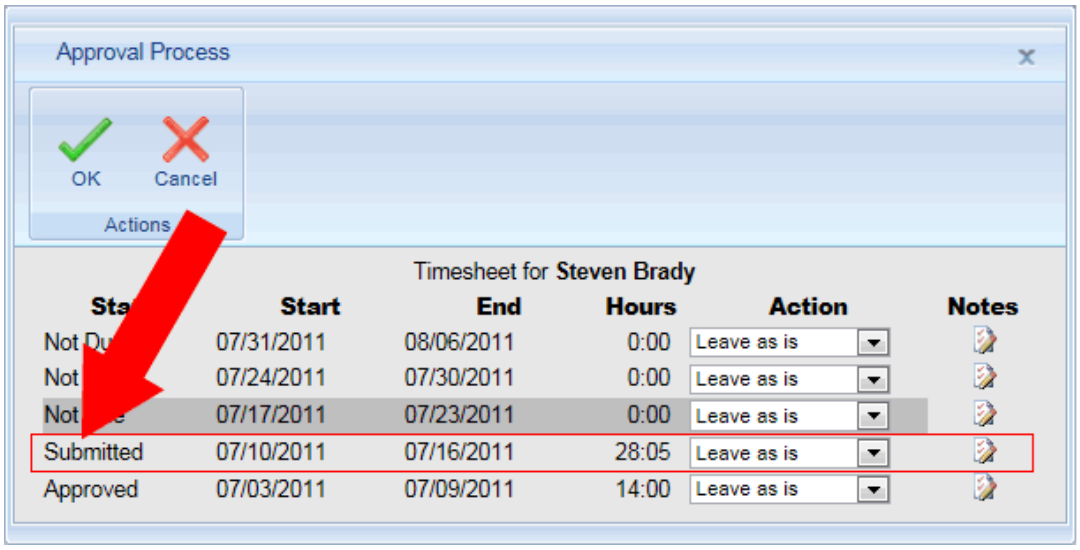
To submit an employee timesheet from Approval Process dialog:

1. Locate a timesheet with a status of **Due** or **Overdue**.



2. Click on the **Action** drop, and select **Submitted**.





3. Click **OK** to close the Approval Process dialog box.

NOTE: Submitting expenses in Office Timesheets is identical to submitting timesheets with Office Timesheets, but is submitted by clicking on the **Employee** icon from the active **Expenses** view.

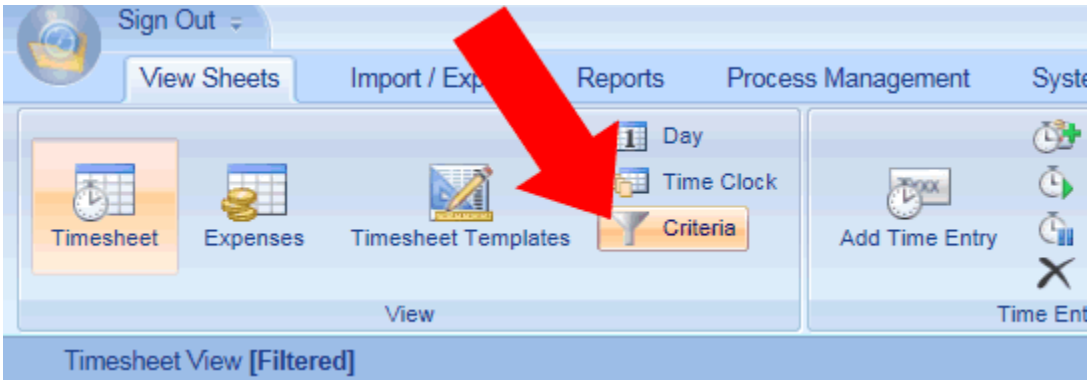
Reviewing Time and Expenses on-screen and Approving Timesheets (for Managers and Administrators)

On-Screen Review of Timesheets

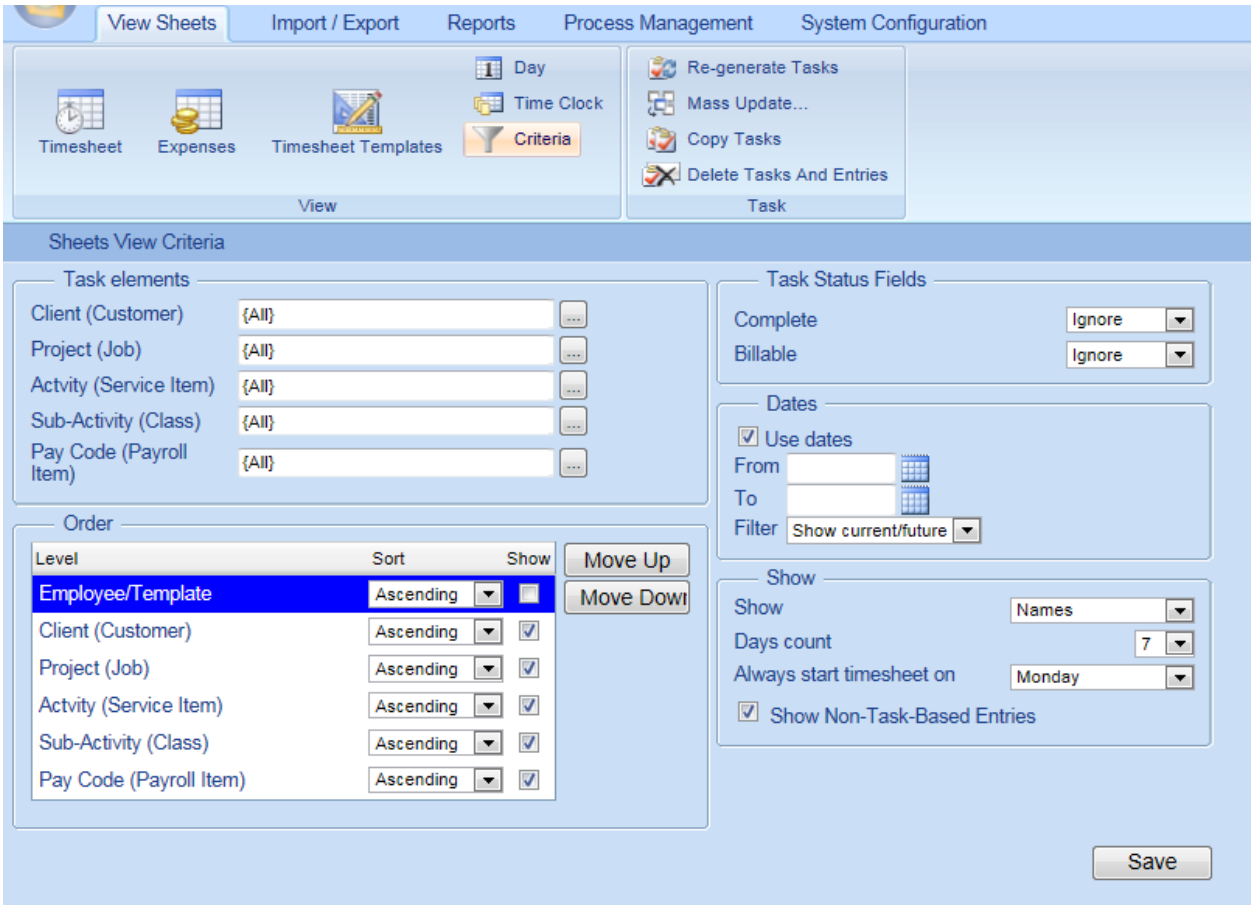
A manager can review all of his/her employee's timesheets at once from within the Timesheet view of Office Timesheets. This allows the manager to review and manage employee timesheets in an interactive on-screen view. This is accomplished by using Office Timesheets' **View Criteria** tool.

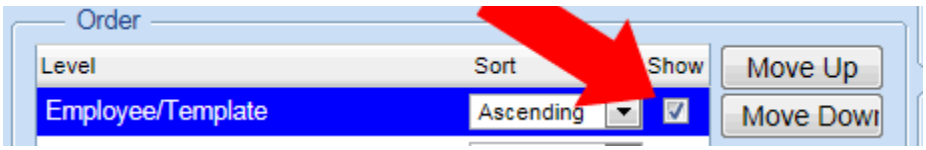
To access Office Timesheets' View Criteria tool, and review a group of employees from within the Timesheet View at once:

1. From the Timesheet View, click on the **Criteria** icon.

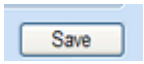


2. In the **Order** group box of Sheet View Criteria, highlight the employee level (as shown below); then select the **Show** checkbox. This will add a new column, **Employee,** to the Timesheet View, so that you may view employee names next to tasks on the timesheet.

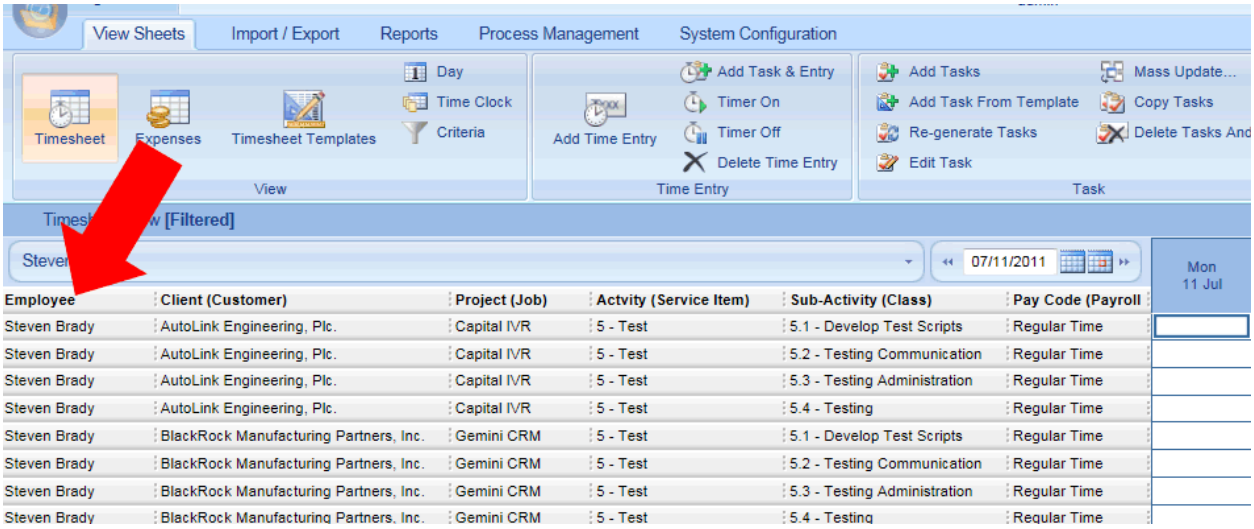




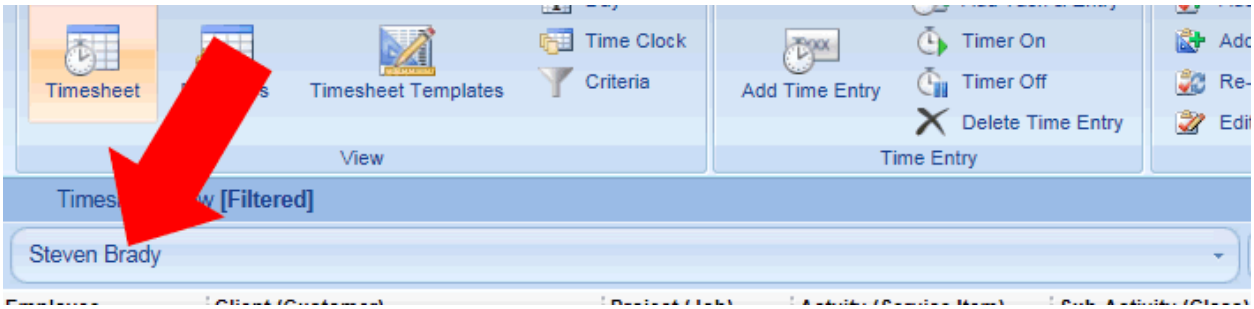
3. Click **Save**.



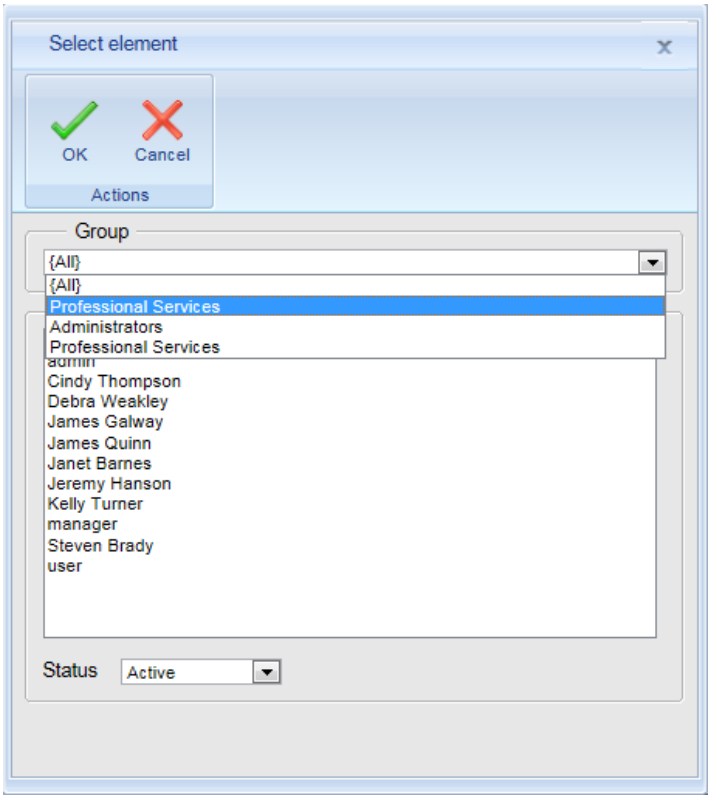
4. Click on the **Timesheet** icon in the **View** ribbon group to return back to the Timesheet View.



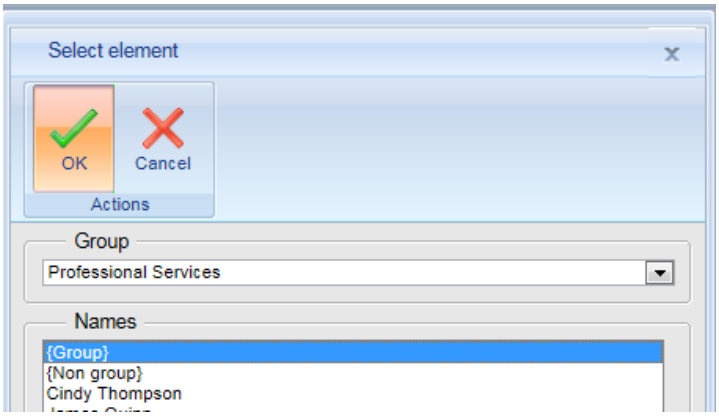
5. Next, click on the Employee display selector as highlighted below.



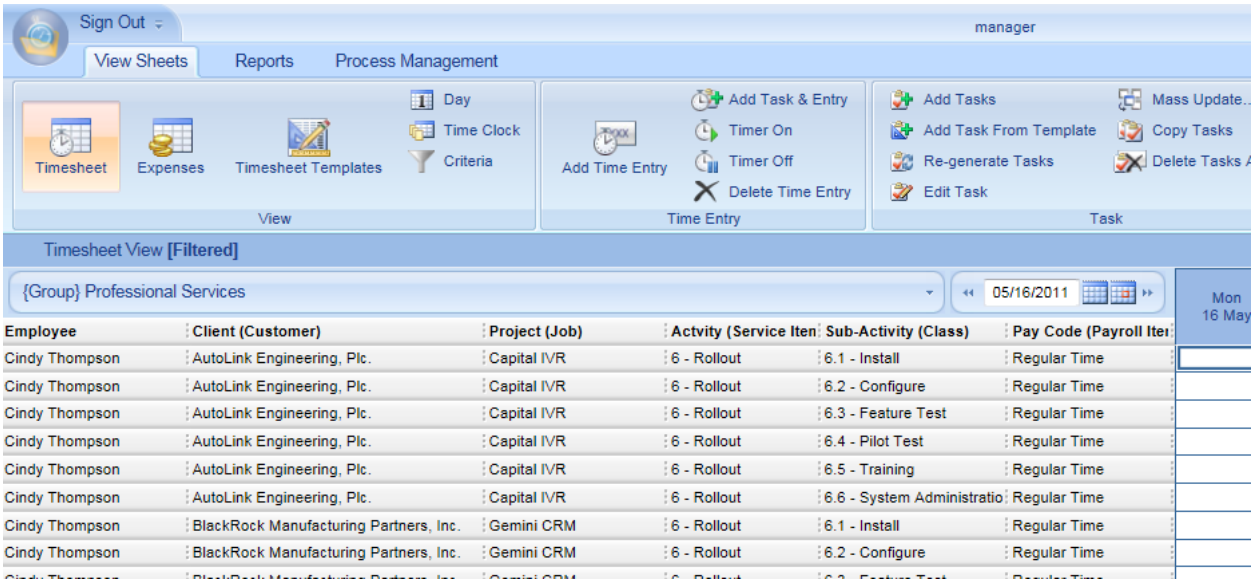
6. Next, click on the Group drop down field from the Select element dialog as highlighted below.



7. Next, select the Employee Group you wish to view, and click **OK**.



You should now see an entire group of employee timesheets within the Timesheet View (see illustration below).


Sign Out
manager
View Sheets
Reports
Process Management
Timesheet
Expenses
Timesheet Templates
Day
Time Clock
Criteria
View
Add Time Entry
Add Task & Entry
Timer On
Timer Off
Delete Time Entry
Time Entry
Add Tasks
Add Task From Template
Re-generate Tasks
Edit Task
Mass Update..
Copy Tasks
Delete Tasks
Task
Timesheet View [Filtered]
{Group} Professional Services
05/16/2011
Mon
16 May
Employee
Client (Customer)
Project (Job)
Actvity (Service Iten
Sub-Activity (Class)
Pay Code (Payroll Iter
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.1 - Install Regular Time
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.2 - Configure Regular Time
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.3 - Feature Test Regular Time
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.4 - Pilot Test Regular Time
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.5 - Training Regular Time
Cindy Thompson AutoLink Engineering, Plc. Capital IVR 6 - Rollout 6.6 - System Administratio Regular Time
Cindy Thompson BlackRock Manufacturing Partners, Inc. Gemini CRM 6 - Rollout 6.1 - Install Regular Time
Cindy Thompson BlackRock Manufacturing Partners, Inc. Gemini CRM 6 - Rollout 6.2 - Configure Regular Time

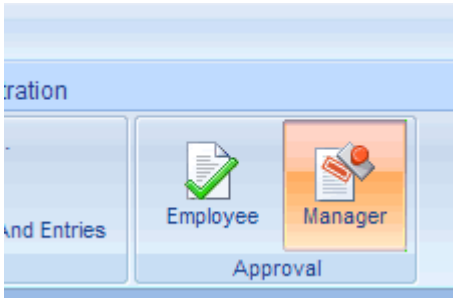
Approving Employee Timesheets (Manager Approvals)

Office Timesheets includes a special tool set for Approving Employee Timesheets, and more. From the Manager Approval screen, group managers can:

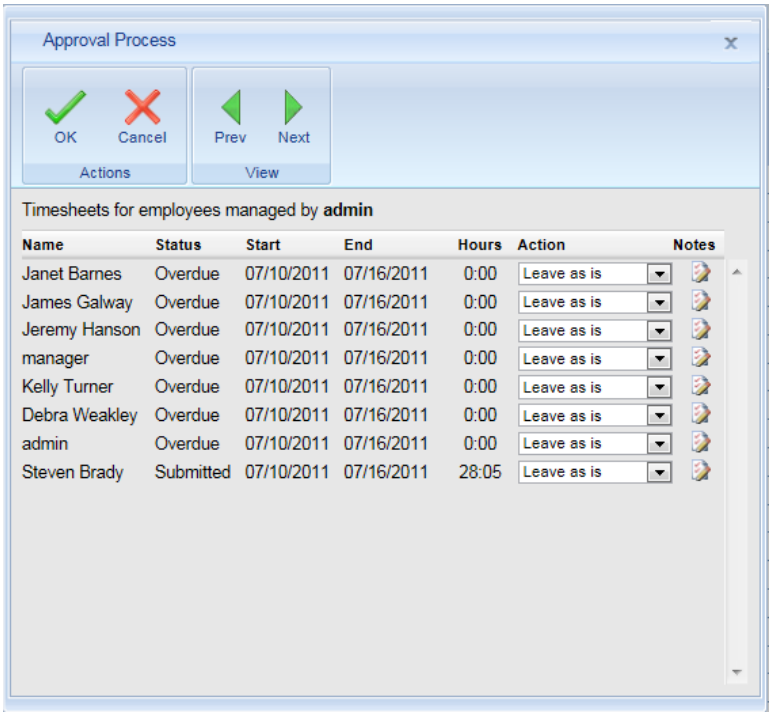
- See the status of their employees' timesheets (Not Due, Submitted, Due, Overdue, Rejected and Resubmitted).
- See the number of hours logged for timesheets by employees.
- Approve and/or reject employee timesheets.
- Enter/review notes for specified timesheets.

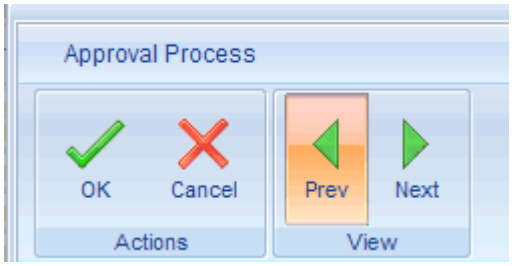
To approve employee timesheets:

1. From the Timesheet View, click on the **Manager** icon in the **Approval** ribbon group.

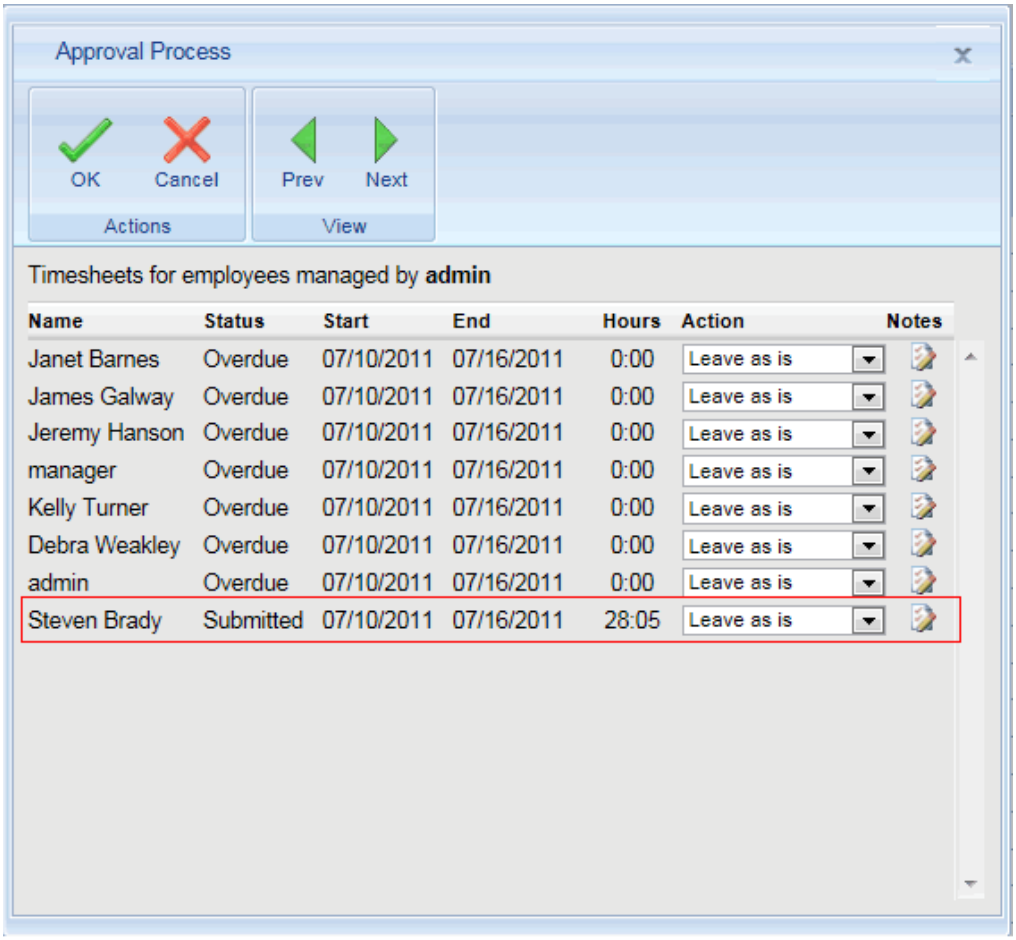


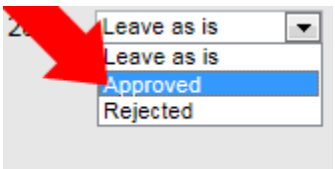
2. Using the **Prev** (Previous) and **Next** buttons, move between dates to view employee timesheets and their status.





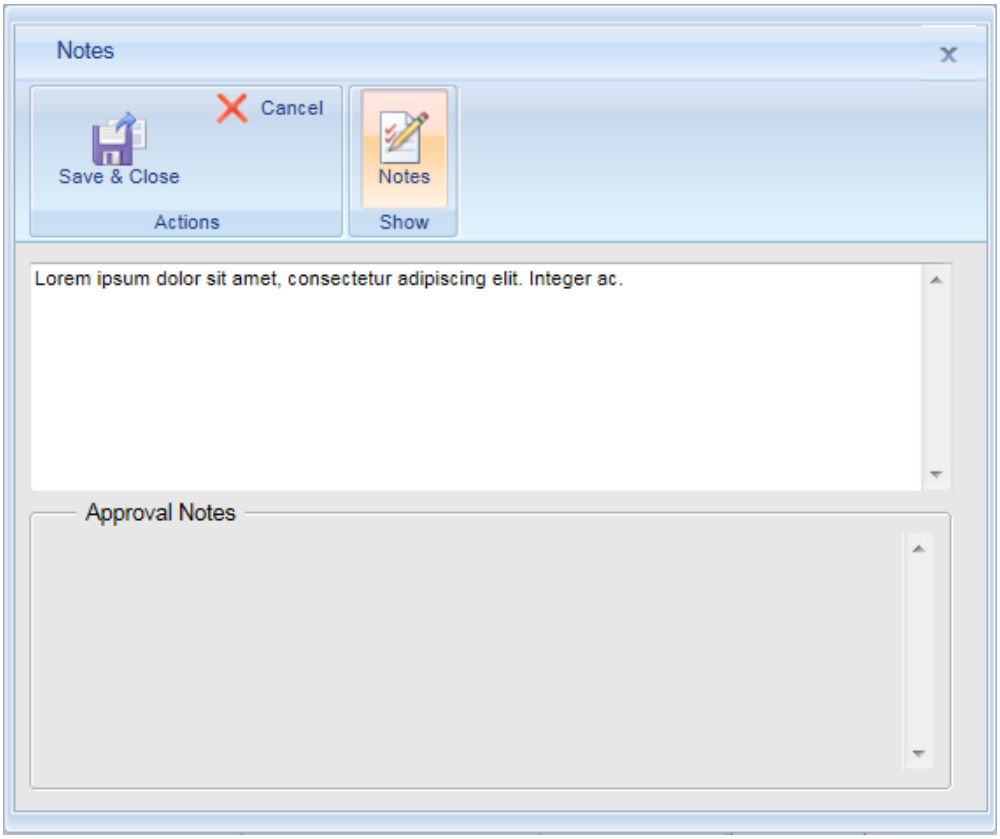
3. Click on the action drop down next to an employee timesheet you wish to approve and select **Approved**.





4. Repeat step 3 for each employee timesheet you wish to approve; and click **OK** when finished.

NOTE: If you'd like create, edit or read notes related a specified timesheet click on the Notes icon for the specified employee timesheets.



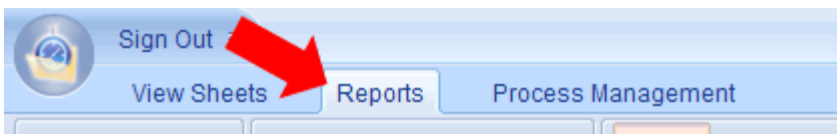
Generating Reports

Office Timesheets provides rich reporting functionality with two built-in reporting engines: the Summary Report engine and the Detail Report engine.

The Office Timesheets Summary Report engine creates spreadsheet style columnar reports and allows for fast and easy report creation in a simple spreadsheet style format.

The Office Timesheets Detail Report engine utilizes Microsoft's Reporting Services Report Viewer, which allows for storage and retrieval of reports designed using Microsoft Reporting Services. Thus, Office Timesheets does not provide the report design tool for Detail Reports. However, Microsoft provides these report design applications/tools free to users that have purchased a license of SQL Server or Visual Studio. Lookout Software does, however, provide several pre-made Detail Report templates, which are available for use by all Office Timesheets users.

To access Office Timesheets reports simply click on the Reports tab.



Creating a Sample Summary Report (Employee Hours Analysis)

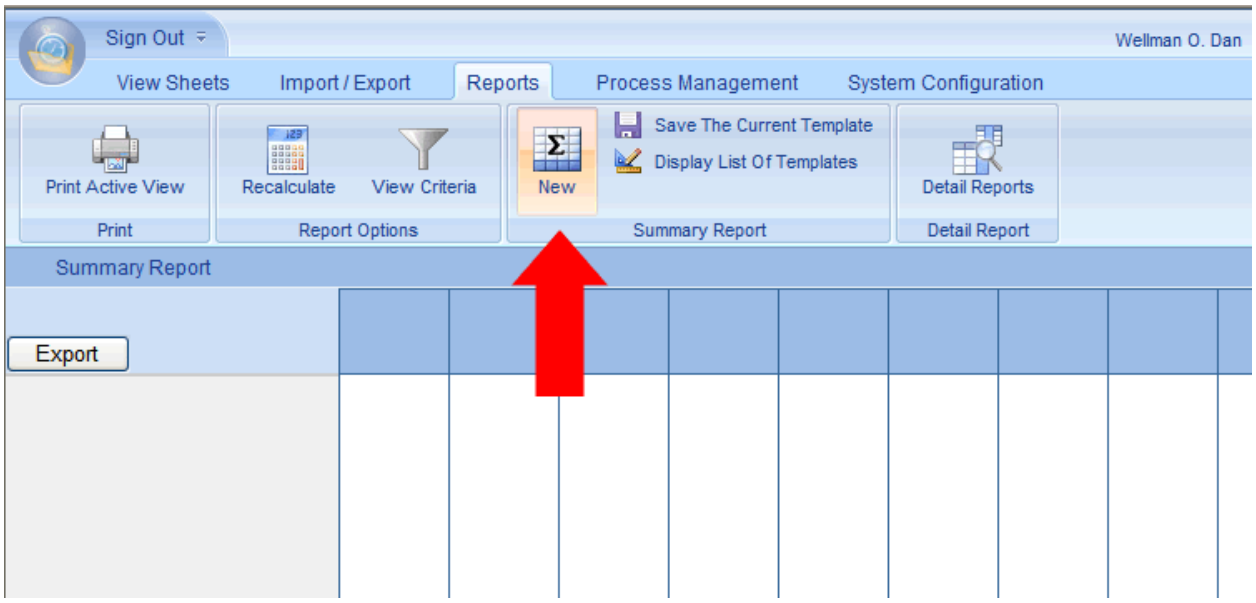
This section of the Quick Start demonstrates the creation of a sample Summary Report that breaks down Employee Hours into three columns by:

- Employee Hours
- Employee Billable Hours
- Employee Non-Billable Hours

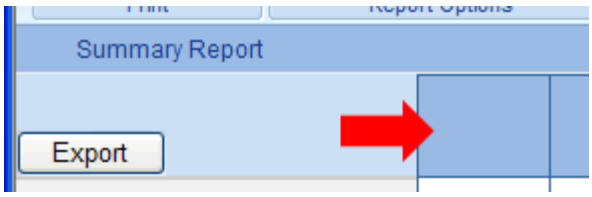
This is simply to demonstrate how to create a simple Summary Report, and to get you familiarized with the various options of the Summary Report writer.

Step 1: Define Report Columns

1. From the Reports tab, click **Summary Report**.
2. Click the **New** icon in the **Summary Report** ribbon group.

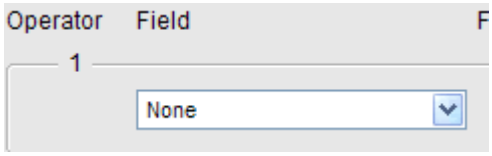


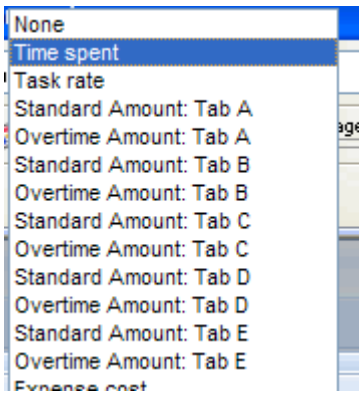
3. Double-click on the Column Header of the first column (highlighted in the illustration below).

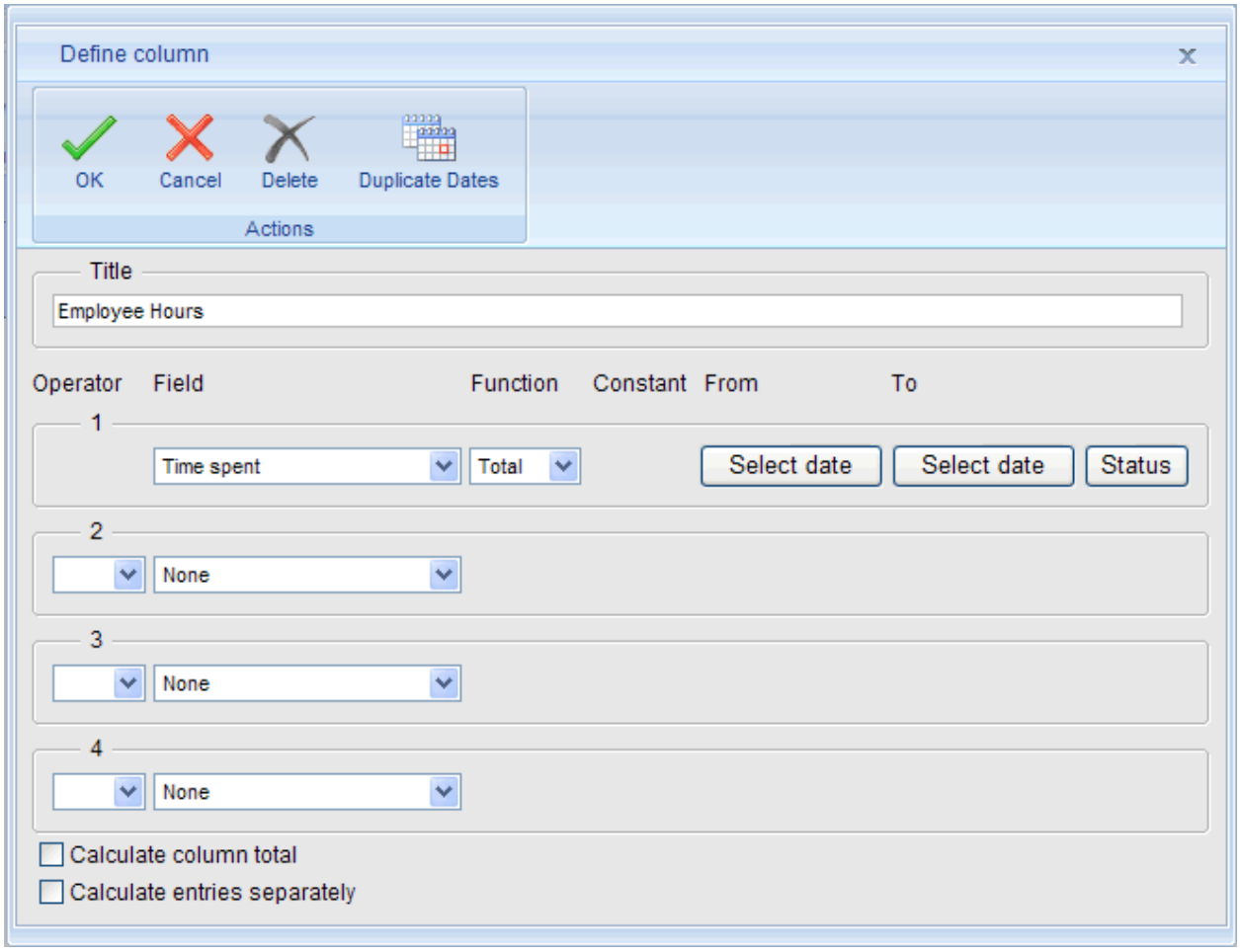


4. Type “Employee Hours” in the Title field (as shown in the illustration below). This will be the title for Column 1 of your report.

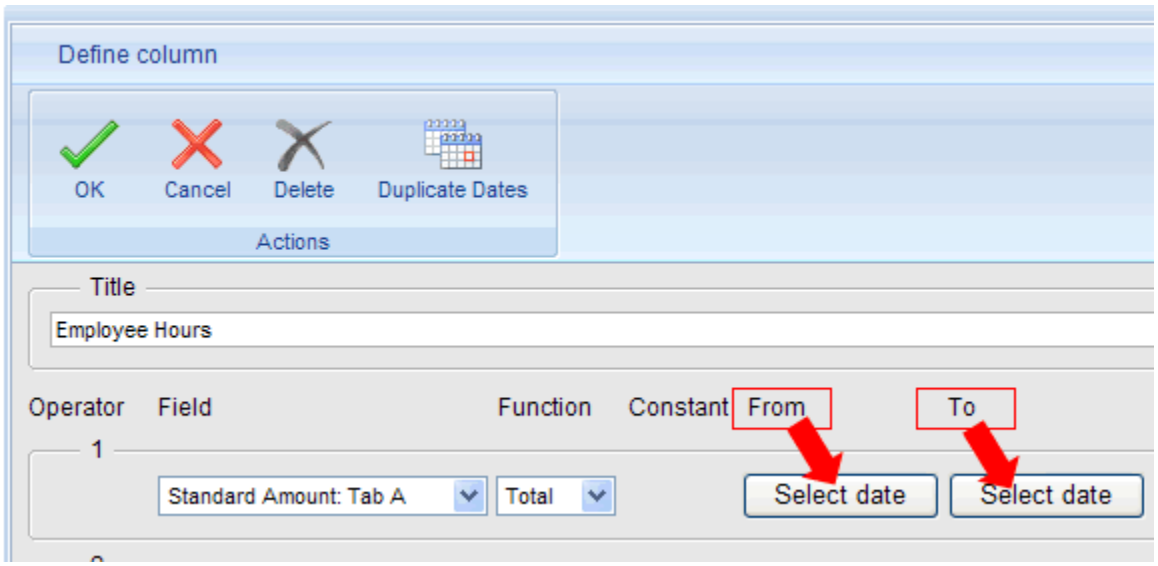
5. Click on the Field 1 drop down and select **Time spent** (as illustrated in the next 3 images below).

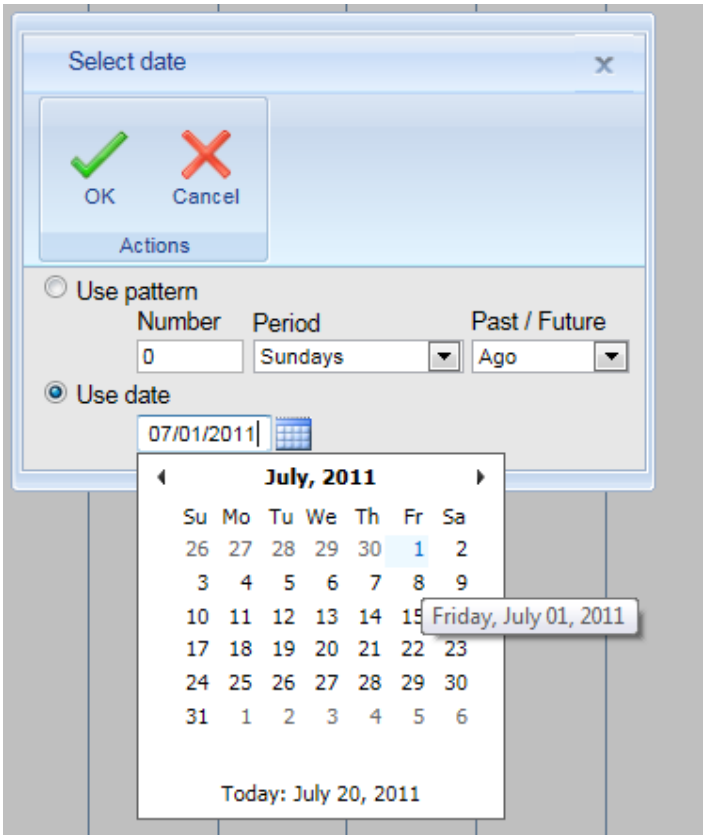




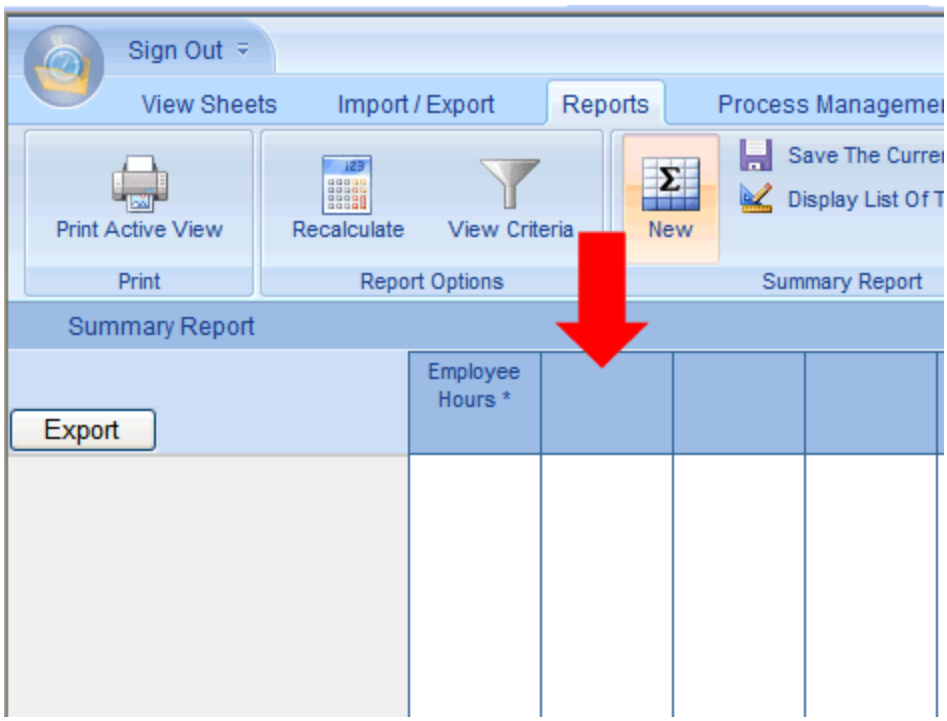


6. Next, click on the **From** and **To** select date buttons, setting the From date and the To date properties (shown in the next two illustrations below).



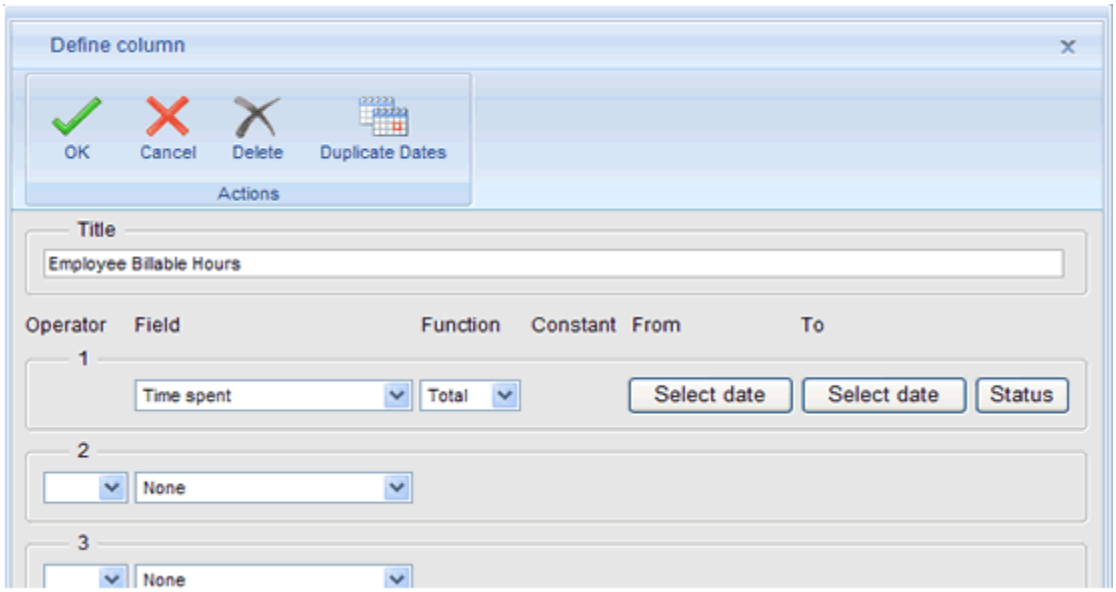


7. Click **OK** to close the Define Column dialog for column 1.
8. Next, double-click on the Column Header of the second column (highlighted in the illustration below).

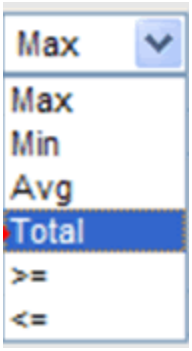


9. Type “Employee Billable Hours” in the title field (as shown in the illustration below). This will be the title for Column 2 of your report.

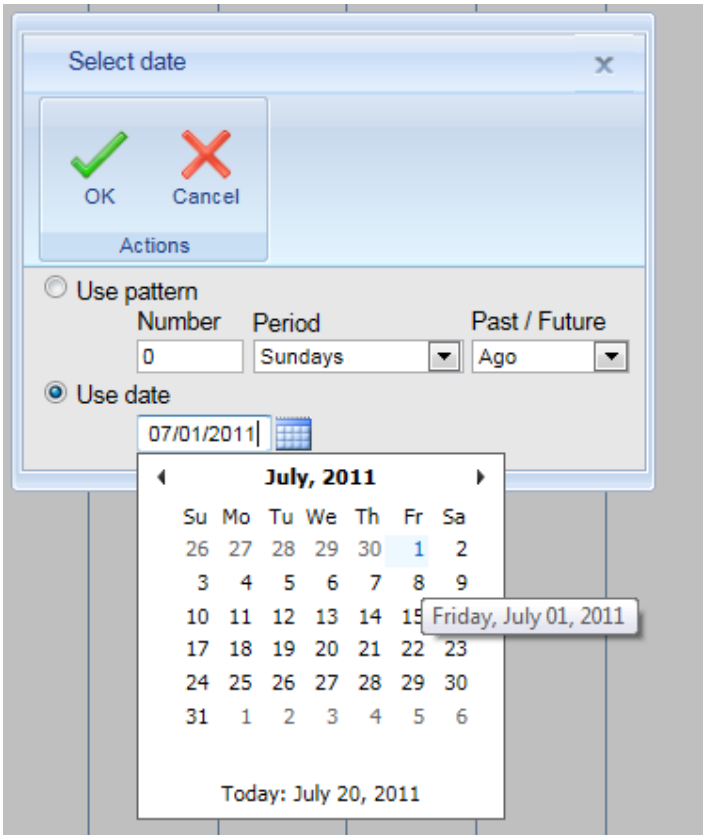
10. Click on the Field 1 drop down and select **Time spent.**



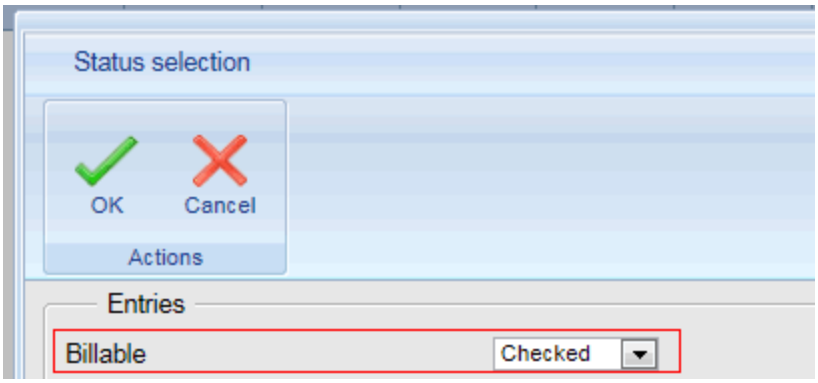
11. Click on the Function drop down, and select **Total** (as illustrated below).



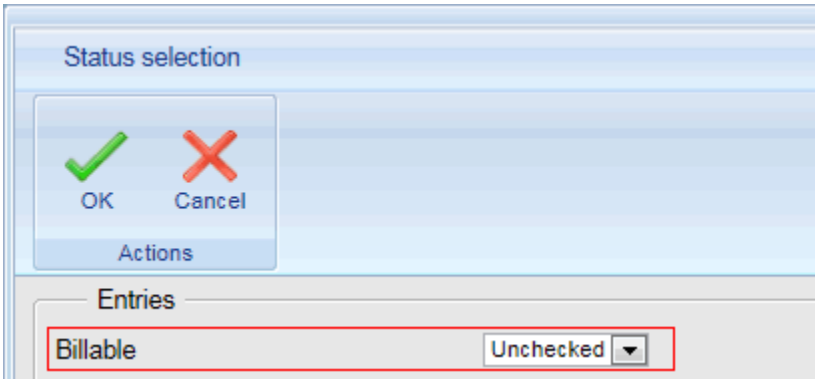
12. Next, click on the **From** and **To** select date buttons, setting the From date and the To date properties (shown in the illustration below).



13. Next click on the **Status** button; and then click on the **Billable** drop down under the **Task** grouping (as shown in the illustration below) and select **Checked**. This will filter the reporting data in this column to show only those entries against tasks that are marked as “Billable”.



14. Click **OK** to close the Status selection dialog; then click on OK to close the Define Column dialog for Column 2.
15. Next, double-click on the Column Header of the third column and give it a name of "Employee Non-Billable Hours"; repeat steps 9 -13 above except when making the status selection for Column 3…set the Billable status to "Unchecked". This will filter the reporting data in this column to show only those entries against tasks that are designated as **Not Billable** (illustrated below).

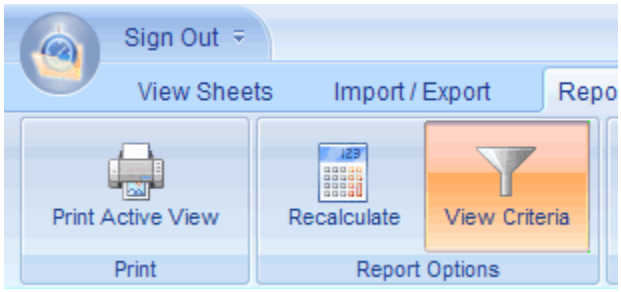


Step 2: Set the View Criteria for the Report

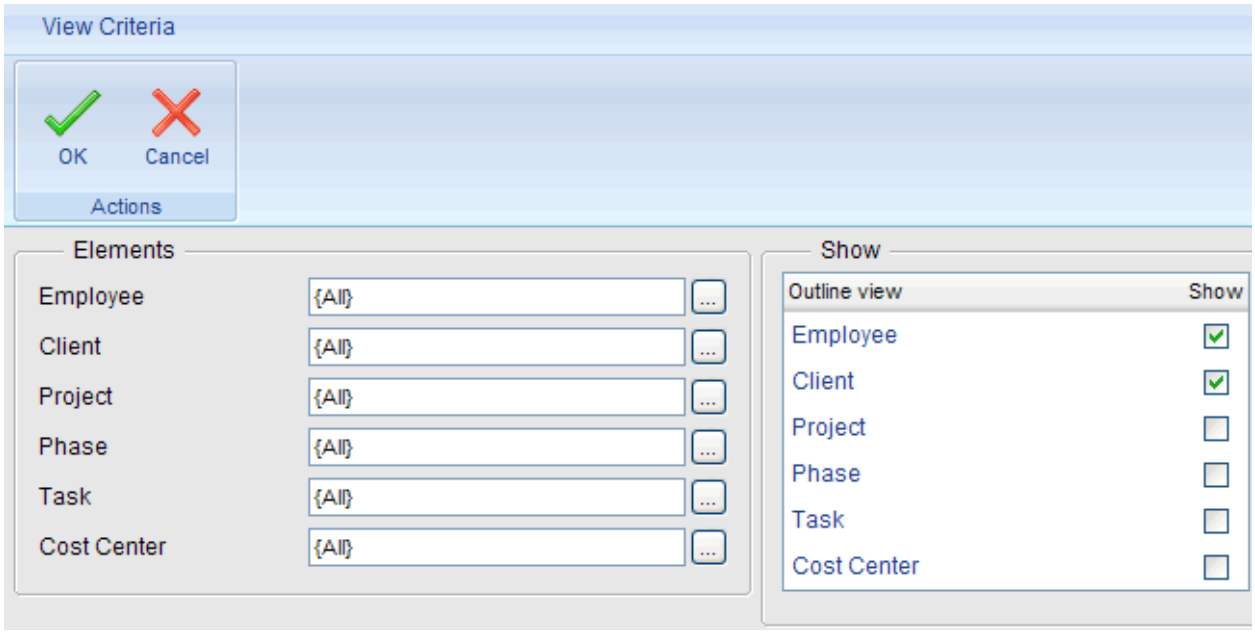
Once you've defined a Summary Report's columns, you then define the element and the order in which you wish to view the elements.

To set your report's View Criteria:

1. Click on the **View Criteria** icon in the **Report Options** ribbon group.



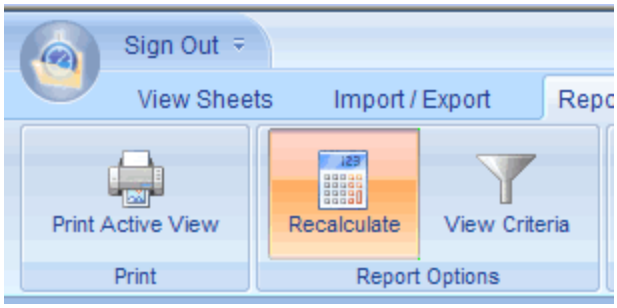
2. Choose the view criteria settings you wish to apply to your report view. For example, the illustration below has set the report to only show the Employee and Client names on the report.

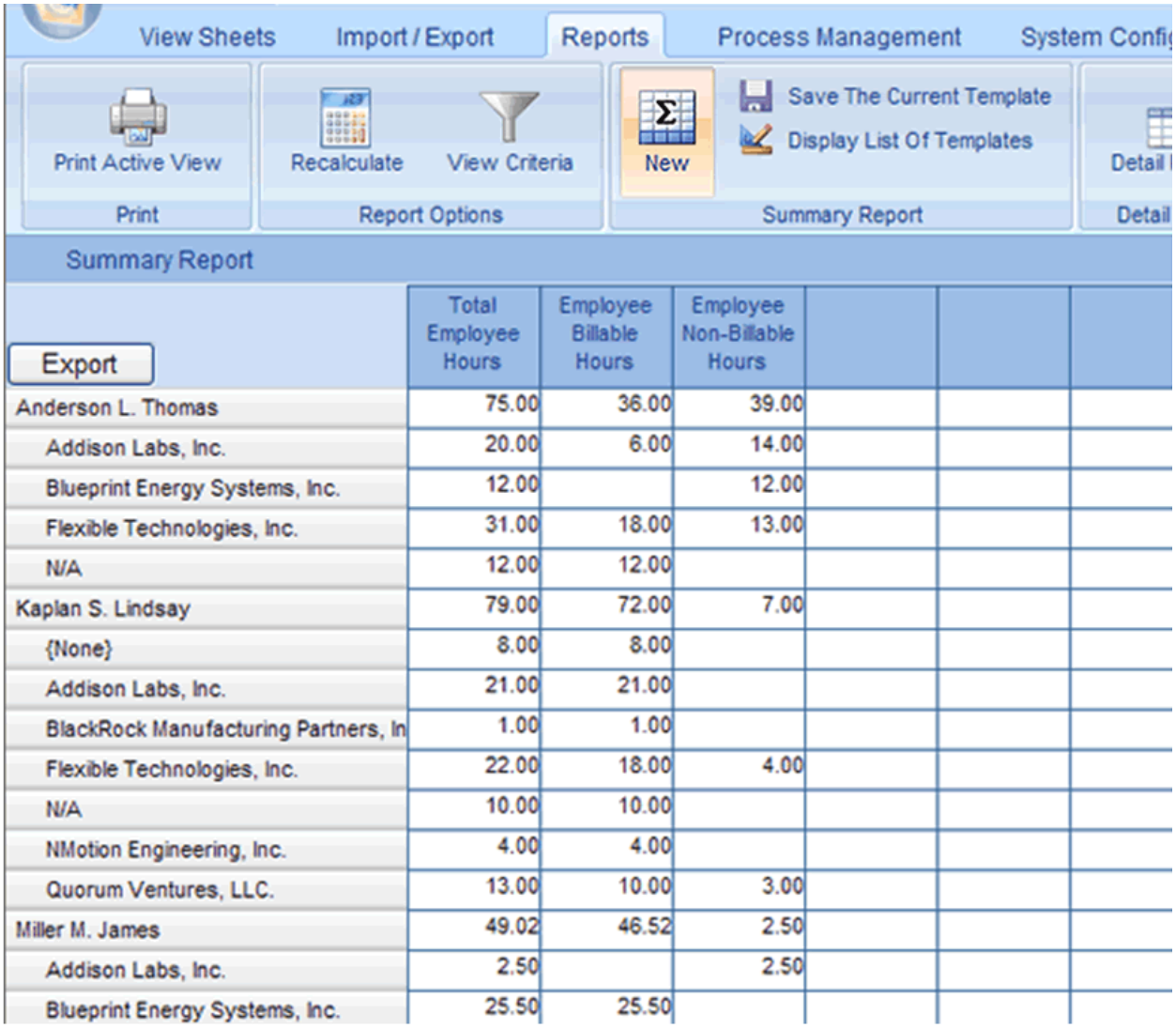


3. Click **OK** to close the View Criteria dialog.

Step 3: Calculate Report

Now that you've defined the columns and view criteria for the report, simply click on the **Recalculate** button to execute the report…



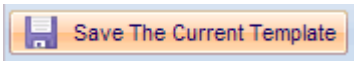


Saving and Retrieving Summary Reports

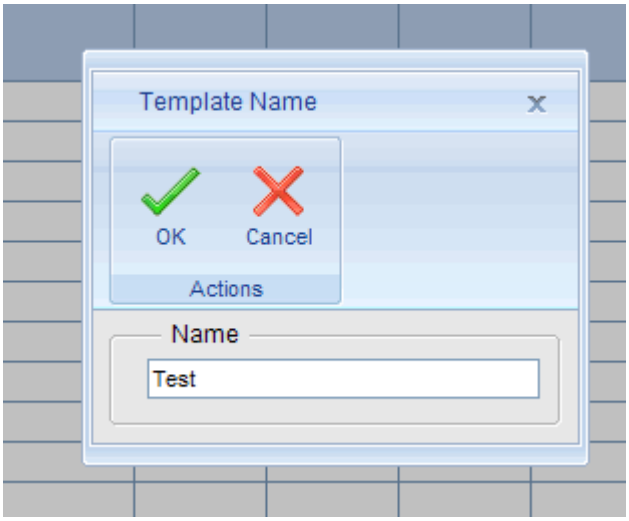
Office Timesheets provides functions for saving and retrieving Summary Reports…

To save a Summary Report:

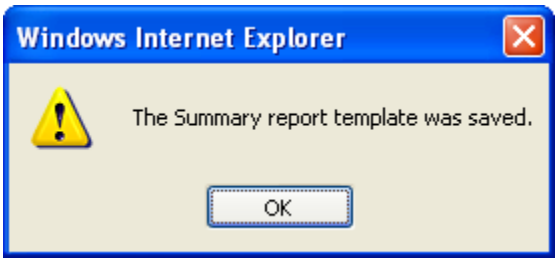
1. Click on the **Save The Current Template** icon in the **Summary Report** ribbon group.

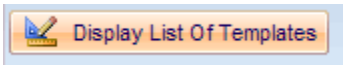


2. Type in a name for the report you wish to save, and click **OK**.



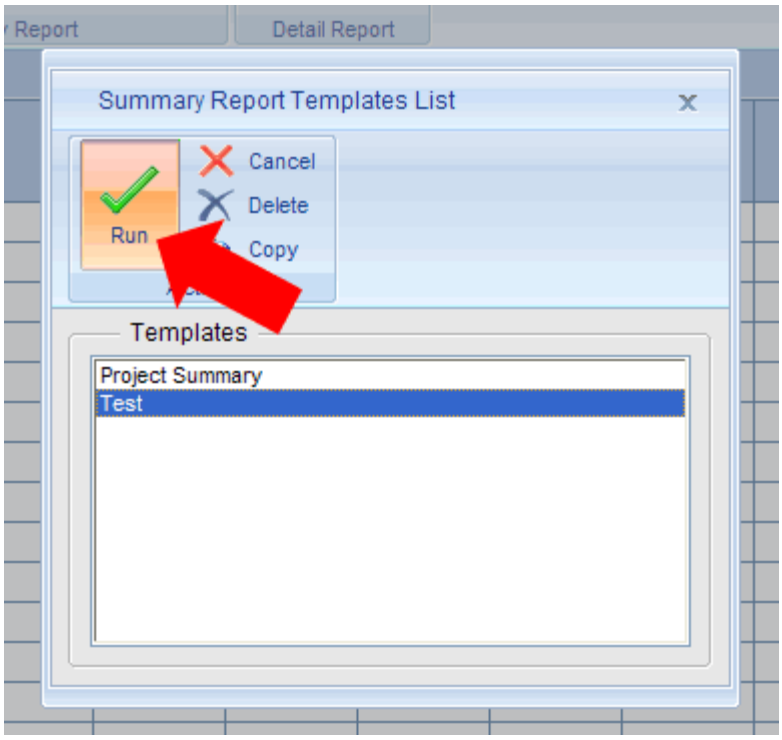
3. Click **OK** once prompted that your Summary Report has been saved.





To retrieve a saved Summary Report:

1. Click on the **Display List of Templates** icon in the **Summary Report** ribbon group.
2. Select the report name you wish to retrieve, and click **Run**.

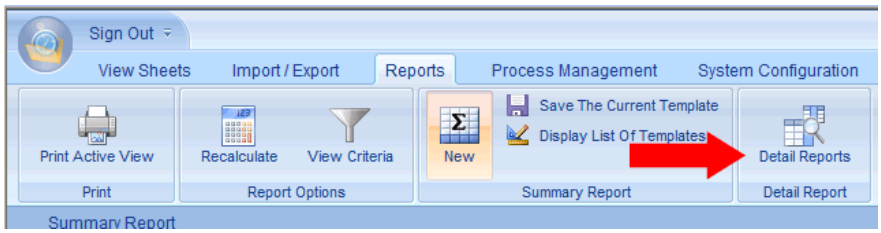

Report
Detail Report
Summary Report Templates List
Run
Cancel
Delete
Copy
Templates
Project Summary
Test

Generating Detail Reports

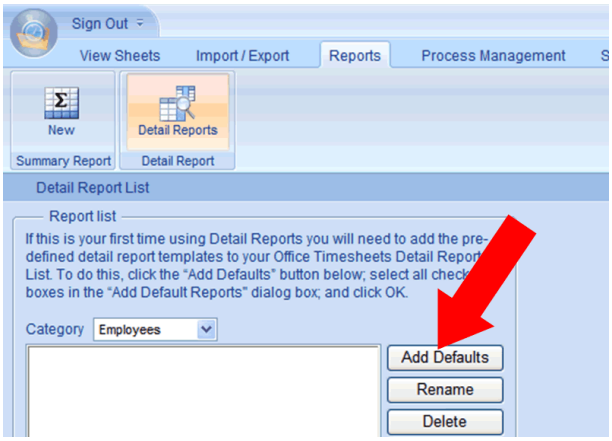
This section demonstrates the creation of a sample Detail Report, and to familiarize you with the options of the Detail Reports tool.

To generate a sample Detail Report:

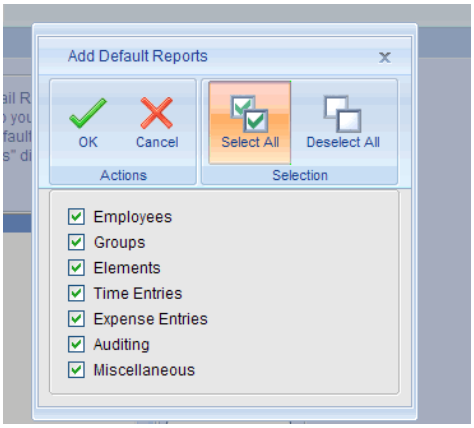
1. From the Reports tab, click on the **Detail Reports** icon.



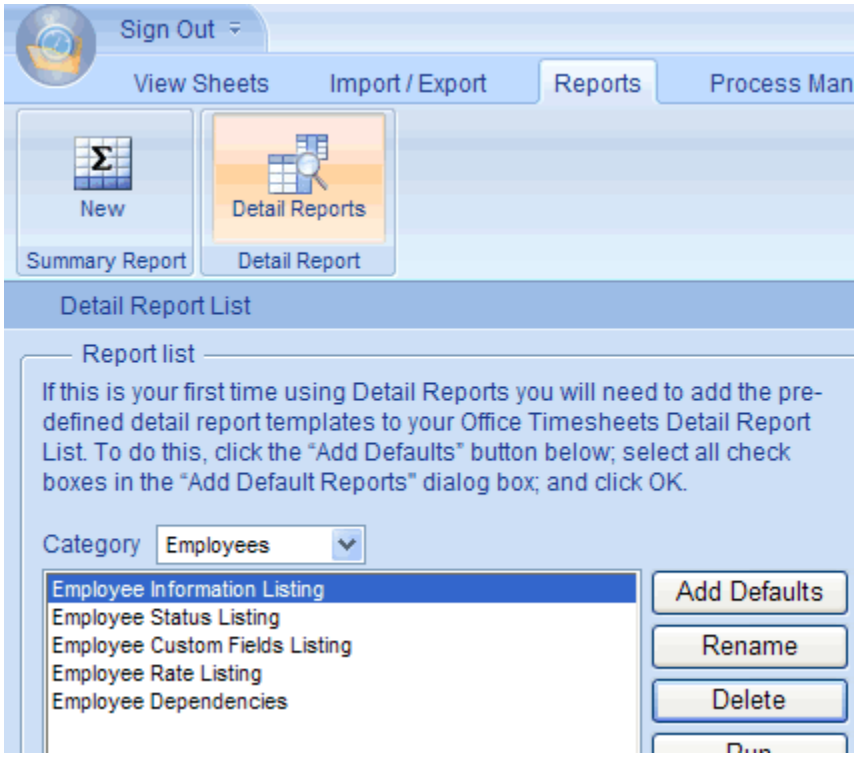
2. From the Detail Report List, click on the **Add Defaults** button.

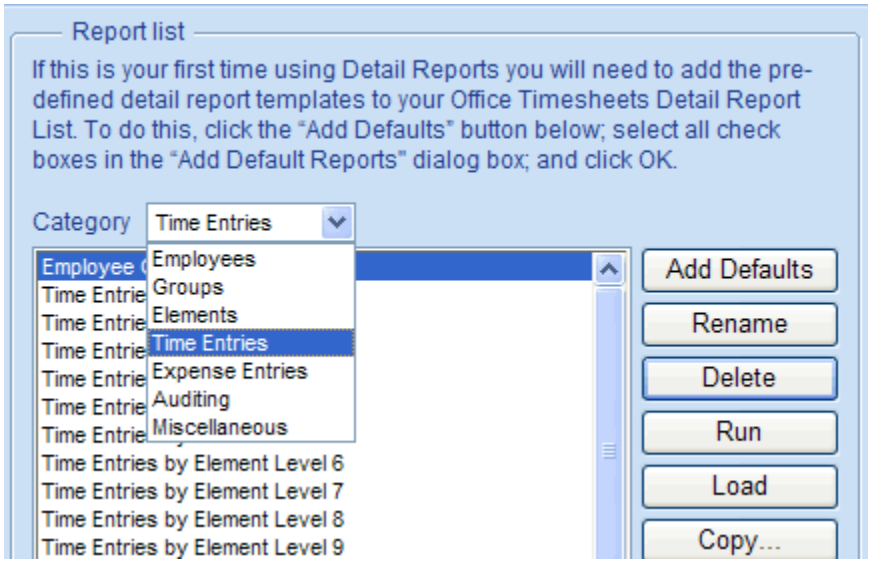


3. From the Add Default Reports dialog box click on the **Select All** icon in the **Selection** ribbon group.

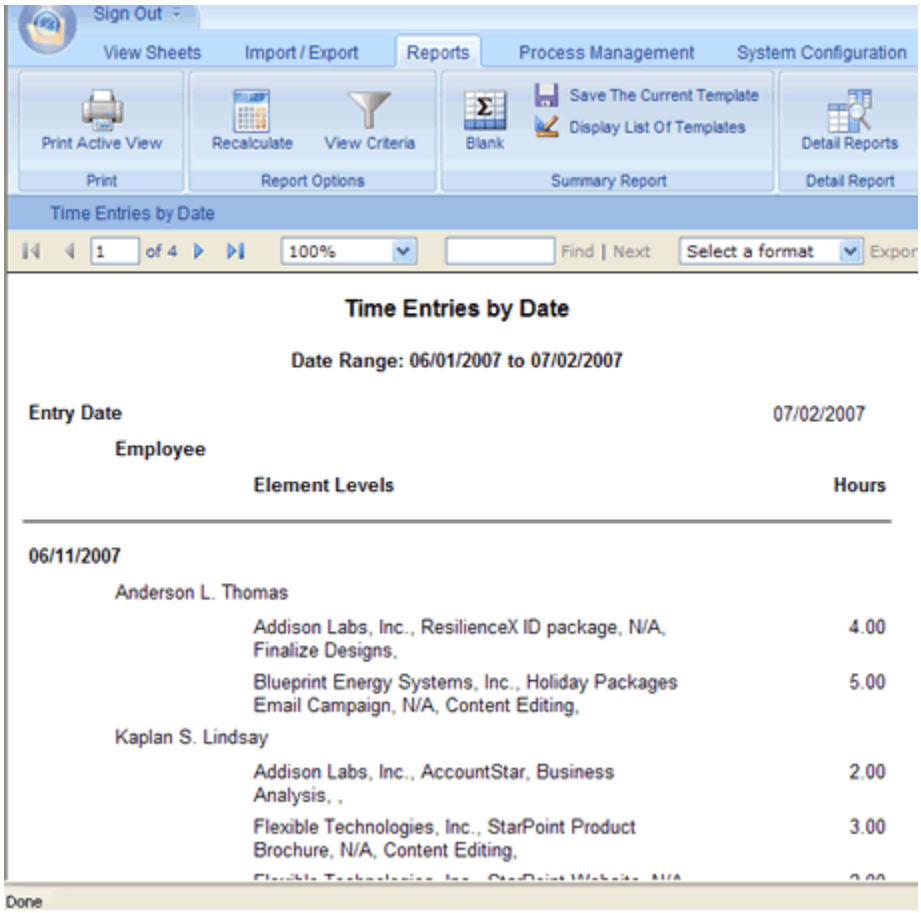


4. Next, click on the **Categories** drop down from within the Detail Report List Dialog box; and select **Time Entries** (shown in next two illustrations below).





5. Next, select the report **Time Entries by Date**; and click the **Run** button.



If you do not see any data in your report, you may want to check the date range in which the report is set. To do this click on the **View Criteria icon in the **Report Options** ribbon group and select a date range in which you know time entries are present using the **From** and **To** date selectors in the **Time Entry Reports View Criteria** dialog box; and select **OK**. Next, click the **Recalculate** icon in the **Report Options** ribbon group to recalculate the report using your new selected criteria.

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 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. There are also many different filtering options for Detail Transaction Reports, just like those found in the Summary Report and Detail Reports.

Finally, once loaded the desired data into the Detail Transaction Report grid, you easily export the data directly to Microsoft Excel for graphing, charting, and more. To learn more about Transaction Detail Report refer to the Office Timesheets Installation and User's Guide.