www.officetimesheets.com

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, install-once, 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
    - By project
    - By phase
    - By task
    - 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 http://www.officetimesheets.com/trial/download_self_installed.aspx.

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 https://www.officetimesheets.com/trial/hostingregister.aspx.

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 https://www.officetimesheets.com/purchase/pricing.aspx.

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 http://blogs.msdn.com/sqlexpress/archive/2005/05/05/415084.aspx.

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.

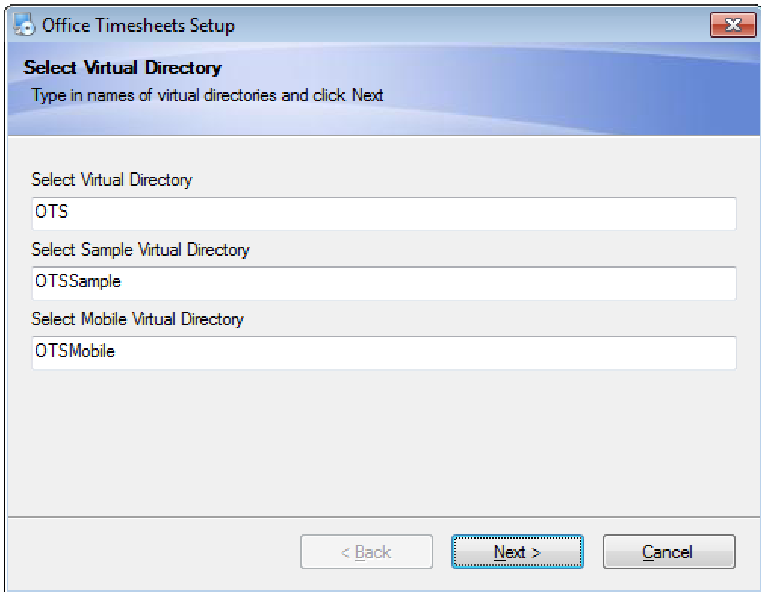
2. The Office Timesheets Setup Wizard will start and the **Welcome** screen will be displayed. Close all other Windows programs that are running and click **Next**.
3. The **License Agreement** will be displayed. Review the license agreement and click the **I agree to the terms of this license agreement** 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.

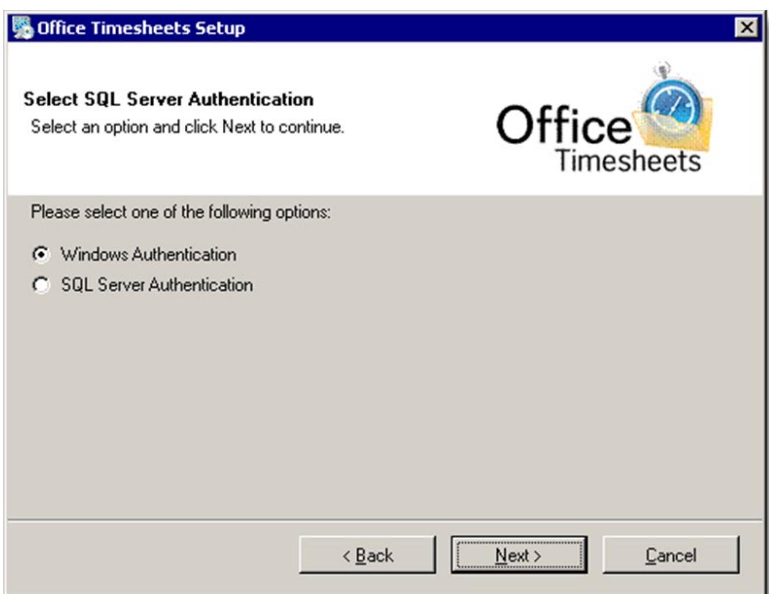
TIP: We recommend that you check the **Sample** option as well so that you have a sample database to explore before configuring your blank Office Timesheets database.

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**.



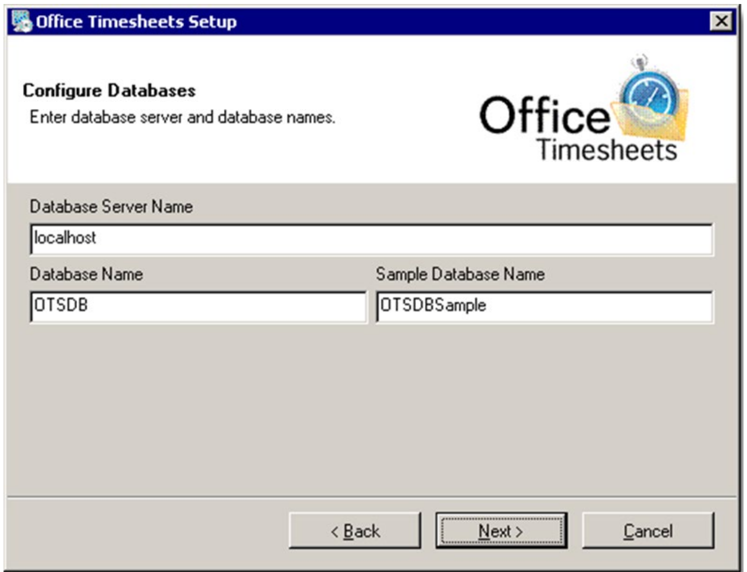
8. Select the type of authentication you would like to use—**Windows Authentication** or **SQL Server Authentication.**



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

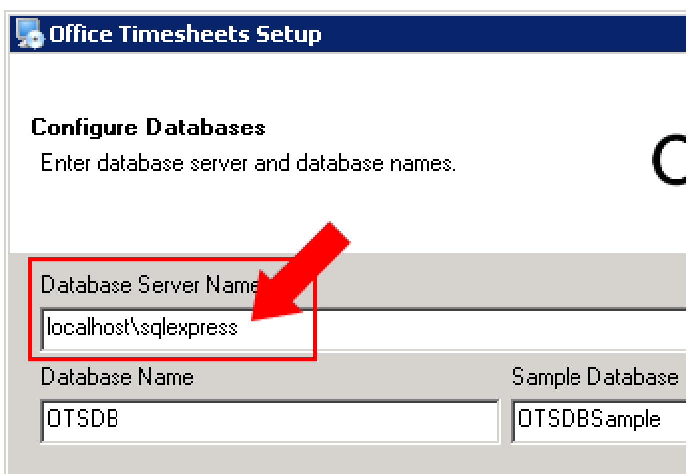
If choosing Windows Authentication…

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



*****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.



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

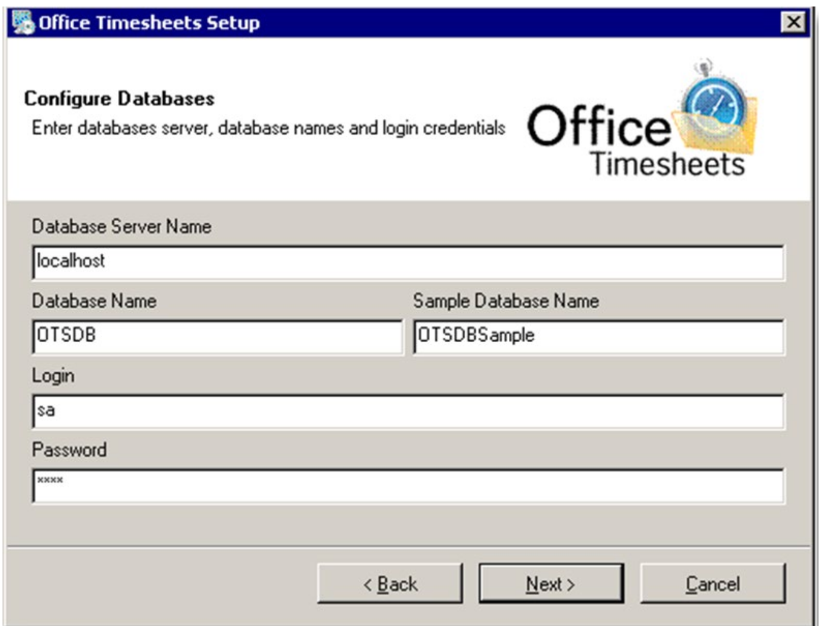
Item	How to use the Item	Default Value (if any)
Database Server Name	Type the name of your database server.	localhost
Database Name	Type the name of the blank (or live) database.	OTSDB

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**.



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 http://localhost/OTSSample.

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 Password = 1	Do everything – create users and user groups, manage users, manage logins, etc. An administrator has all security rights.
A Manager	Username = manager Password = 2	Enter time and approve employee timesheets.
A User	Username = user Password = 3	Enter and time and/or expense 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.
2. 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 http://localhost/OTS

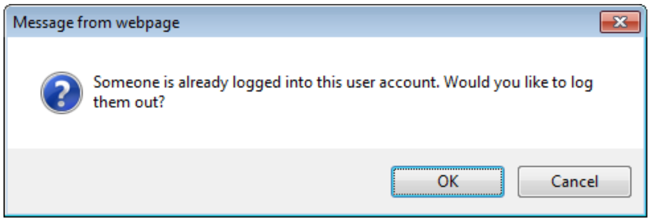
   TIP: Ask your systems administrator for the exact URL of the Office Timesheets Live Database login page.

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:



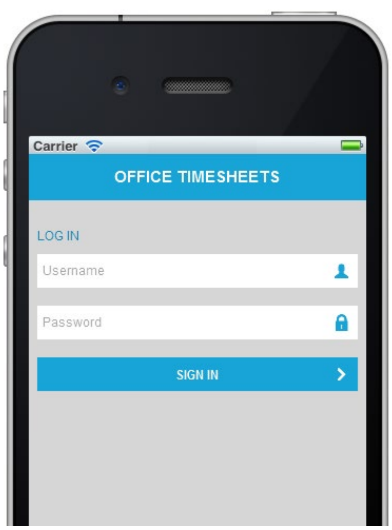
Click **OK** to log the user out or click **Cancel** to return to the login screen without logging them out.

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 http://localhost/OTSMobile



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

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 http://localhost/OTSMobile

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

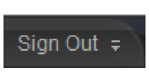
3. When the Office Timesheets login screen appears, type **Admin** as the username and **1** as the password.

   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.

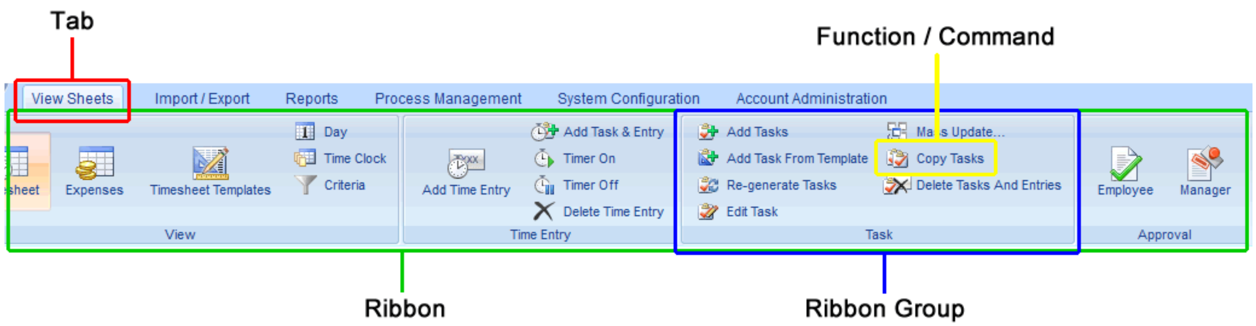
Logging out from Office Timesheets

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.



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...	To...
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.

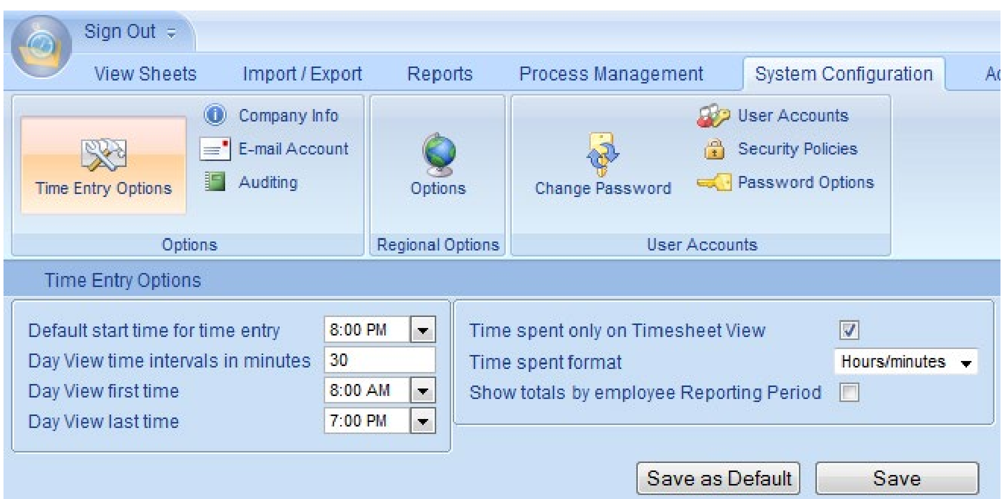
Click on...	To...
Options	Set up system-wide regional specific options such as how dates, time and currencies are displayed, and select the language to be used.
Change Password	Set or change your password.
User Accounts	Set up user accounts for your employees so that they can use **Office Timesheets**.
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 **Office Timesheets** 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.



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 **Office Timesheets** to use for the interval between two time slots on the **Day View** screen.	30 minutes.
Day View first time	Enter the time to be used for the first time slot in the **Day View** screen.	08:00 AM.
Day View last time	Enter the time to be used for the last time slot in the **Day View** screen.	06:00 PM.
Time spent only on Timesheet View	Check this check box to enable the **Time Spent Only** field in the **Time Entry** dialog box when an employee opens it from the **Timesheet View** screen. Uncheck this check box to disable the **Time Spent Only** field in the **Time Entry** dialog box when an employee opens it from the **Timesheet View** screen. **Note:** If you check this check box, the **Start time** and **Stop time** fields in the **Time Entry** dialog box will be hidden when opened from the **Timesheet View** screen.	
Time spent format	Select the format to be used for the **Time spent** field in the **Time Entry** 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 **Task Totals** and **Sheet Total** on your Timesheet. If you **uncheck** this checkbox, the Task Totals and Sheet Total on your Timesheet **will display the totals for only the period that you are currently viewing** 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 **check** this checkbox, the Task Totals and Sheet Total **will display the total for your Reporting Period**, *irrespective of the period that you are currently viewing in your Timesheet*. For example, if your Reporting Period is a	

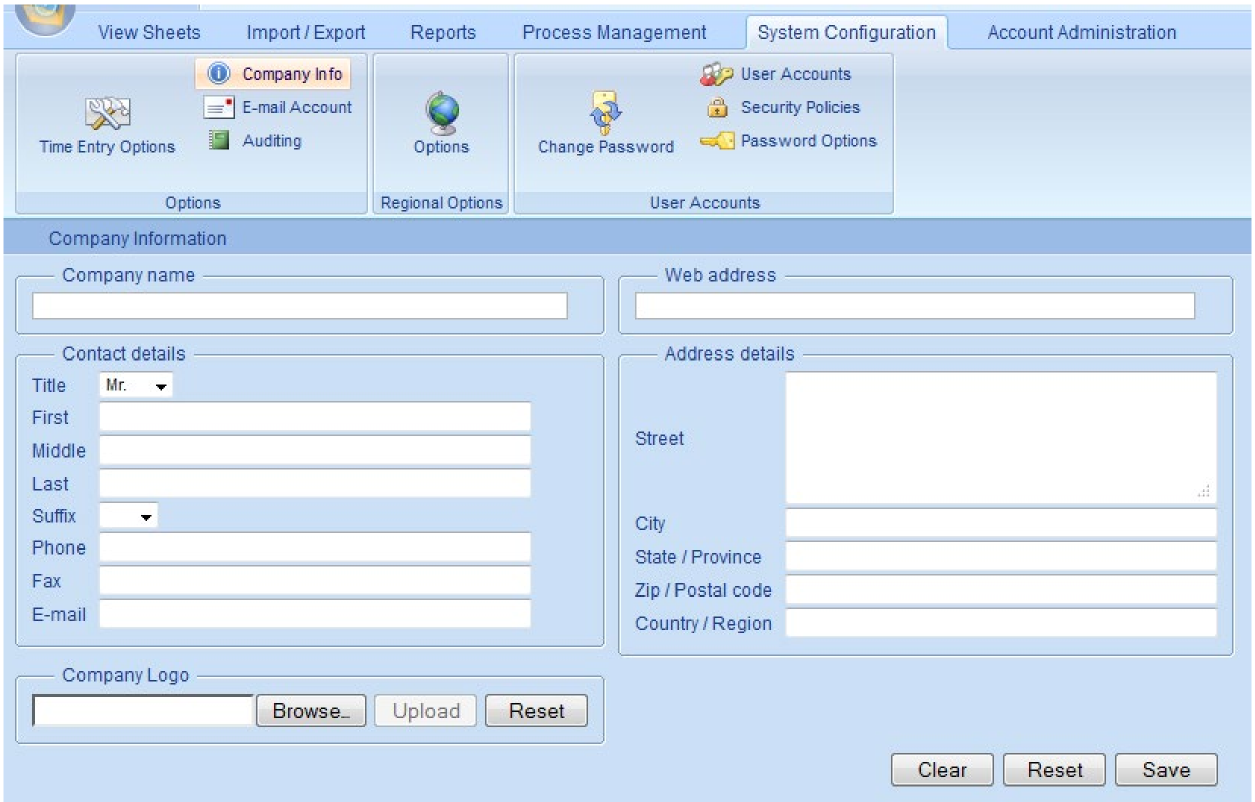
Item	How to use the Item	Default Value (if any)
	month, the Task Totals and Sheet Total will display the total for the month, even if you have set up your timesheet to display a week at a time. See Managing Time and Expense Details for more information about Timesheets.	
The Save and Save as Default buttons	Click the **Save** button to save any changes you make to the page. Click the **Save as Default** button if wish to make these settings the default settings for all users. **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.	

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.



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

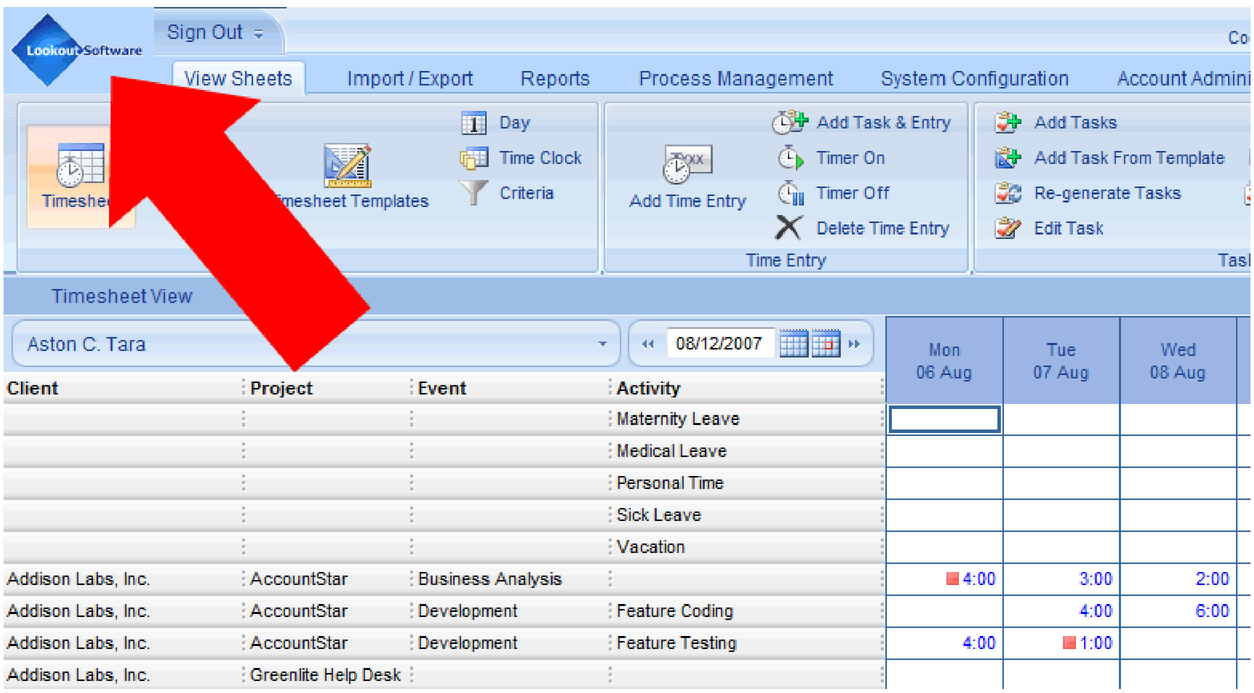
Item	How to use the Item	Default Value (if any)
Company name	Enter the name of your organization.	
Web address	Enter the web address of your organization.	
Contact Details	Enter the contact details of a person in charge of Accounts Receivables. **Note:** The items in the **Contact Details** panel are all optional. It is not necessary to provide contact details. However, if you *do* 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	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. **TIP:** 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 **Enter** 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 Logo	Customize 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 **Clear** button to delete all the values from the fields on the page.	
The Reset button	Click the **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

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



Configuring E-mail Settings

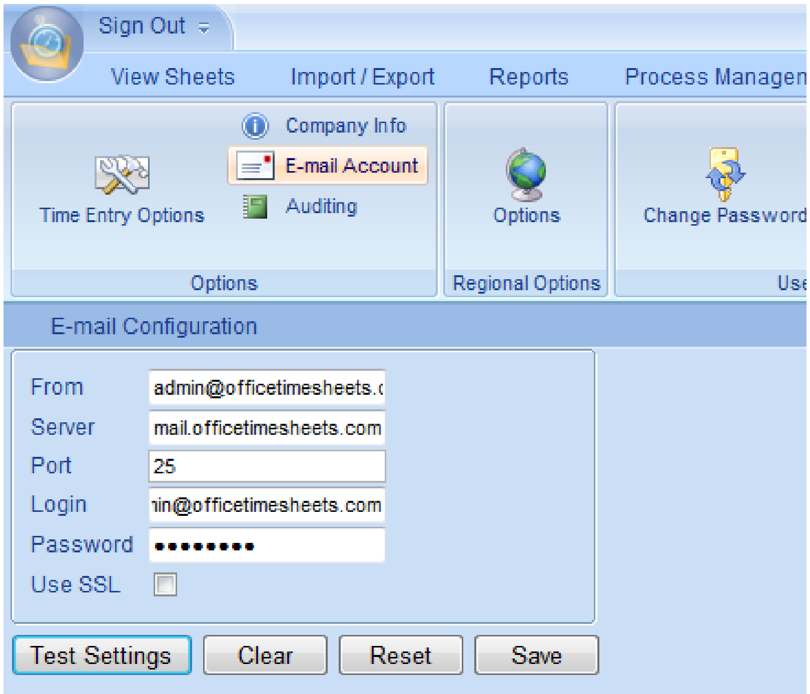
Office Timesheets can send notification e-mails to employees and managers. In order to be able to send these e-mails, Office Timesheets needs to connect to your email server.

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.



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 **Office Timesheets**.	
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 **Office Timesheets** should use to connect to the outgoing mail server.	
Password	Enter the password that **Office Timesheets** 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 about the success or failure of the test. If the test fails, it means that you have made some mistake while entering the data into the above fields. Correct the error(s) and test the settings again.	
The Clear button	Click the **Clear** 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 **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	
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.

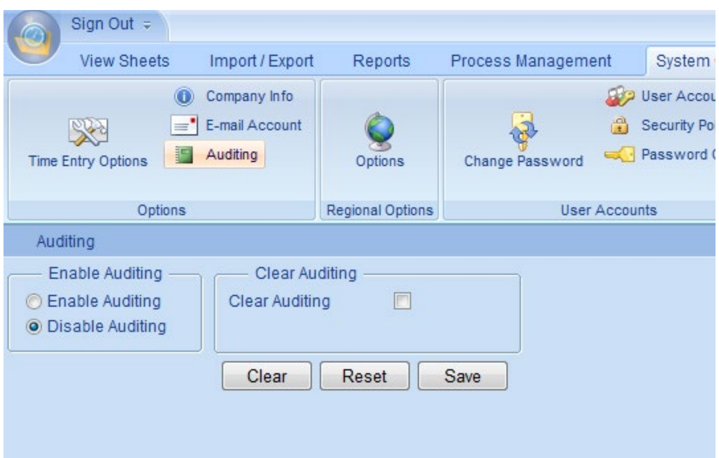
- An Audit trail report has to be prepared that includes the complete history of the changes made to a user's timesheet after initial submission. Details include items such as the modified date, row affected, field affected, date affected, initial value, changed value, and change comments. Thus, we have 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:

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 **Clear Auditing through** 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. **Note: Audit Start**, **Audit Stop**, and **Audit Clear** entries are never removed from the auditing database, even when you clear the Audit tracks.	A date that is 30 days before the current date
The Clear button	Click the **Clear** 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 **Reset** button to undo your changes and restore the options back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

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.

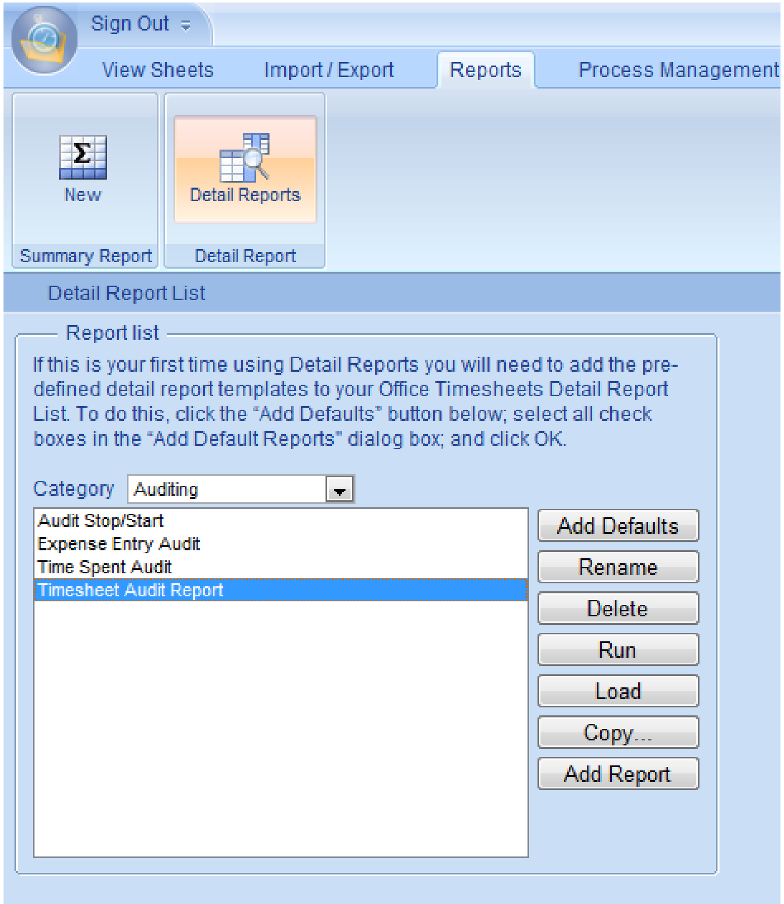
There are six audit statuses that Office Timesheets can assign to an audit entry. The six audit statuses are described in the following table:

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 **Audit Start**.
Audit Stop	Indicates the end of audit tracking.	When the systems administrator disables auditing, an audit entry is created with an audit status of **Audit Stop**.
Audit Clear	Marks the time when the audit track is cleared.	When the systems administrator clears the auditing track, all audit entries upto the **Clear Auditing through** date (except for **Audit Start**, **Audit Stop** and **Audit Clear** entries) are deleted from the auditing database, and an audit entry is created in the auditing database with an audit status of **Audit Clear**.
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 **Audit Create**.
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 **Audit Change**.
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 **Audit Delete**.

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.



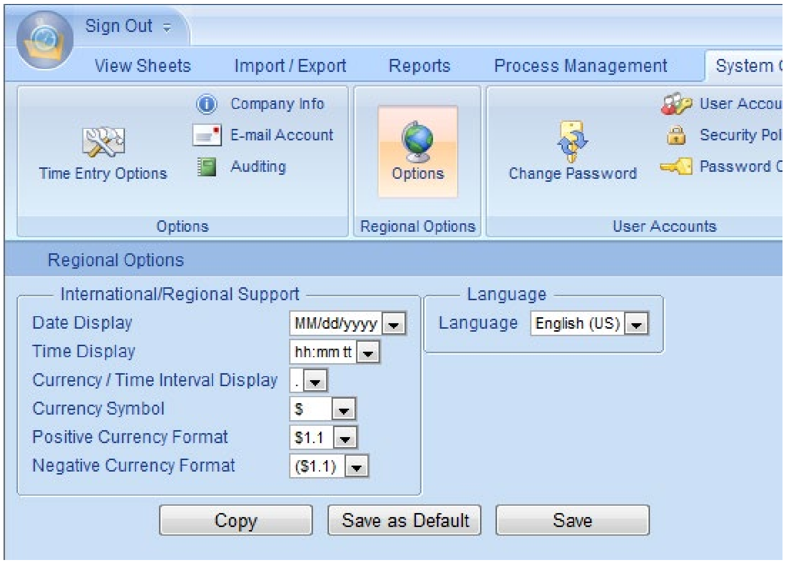
Changing Regional Settings

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.



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 drop-down list, select how you would like time data to be displayed in Office Timesheets. The **Time Display** drop-down list contains the following values— **Value...** **What it does...** hh:mm tt — Displays time values in a 12-hour format. (Eg: 3:15 PM) HH:mm — Displays time values in a 24-hour format. (Eg: 15:15)	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 **Copy** 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 **Save as Default** 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. **Note:** Only an administrator can save the settings as the default settings.	
The Save and Save as Default buttons	Click the **Save** 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 **Save as Default** button. **NOTE:** If you move to some other page before clicking the **Save** button or the **Save as Default** 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. **TIP:** If you do not want to save your changes, move to some other page *without* clicking the **Save** button or the **Save as Default** button.	

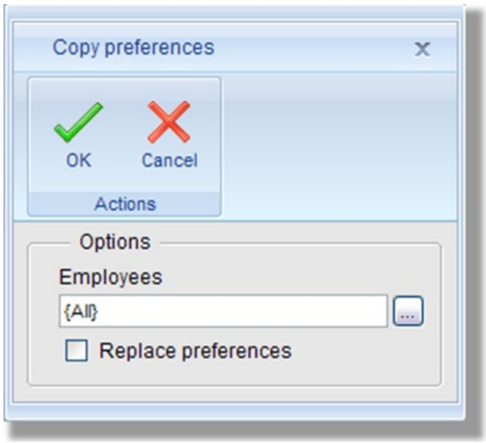
Assigning Regional Options Settings to Other Users

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.

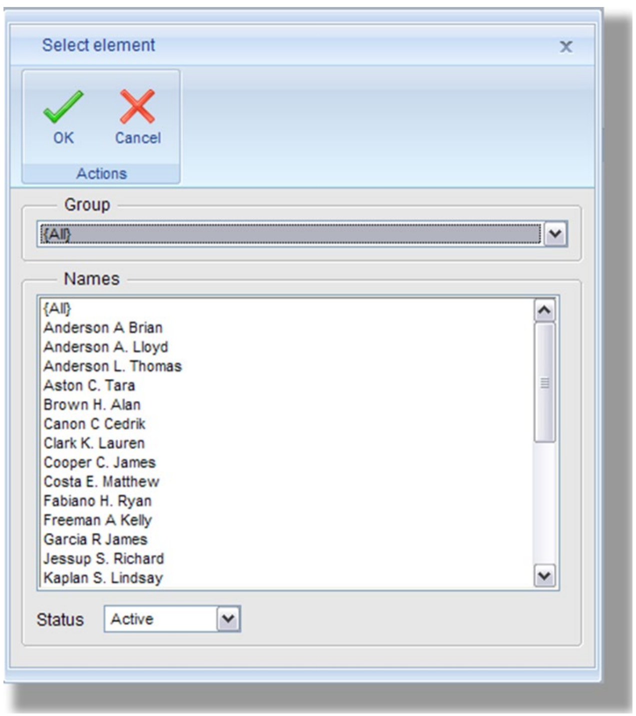
To assign the Regional Option settings to other users:

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.



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.



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

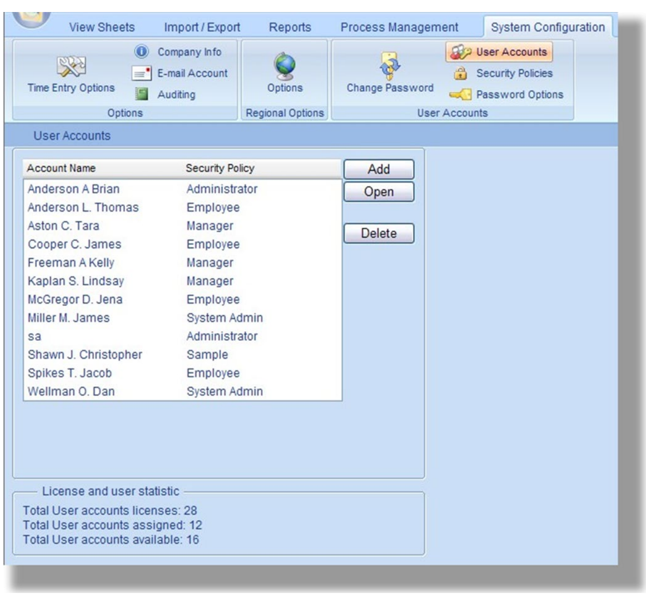
An Office Timesheets login consists of two required elements: the Employee's name and a Security Policy. An Office Timesheets administrator manually populates the Office Timesheets database with employee names or imports employee data from another application or from Active Directory.

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:

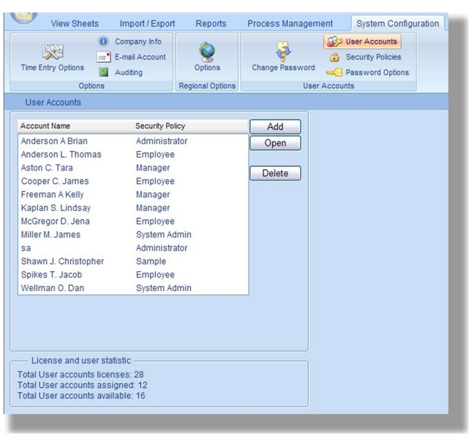
Item	How to use the Item	Default Value (if any)
License and user statistic	This panel displays the total number of User Accounts licenses purchased, the total number of accounts assigned or in use and the total number of accounts available.	
The Add button	Click the **Add** button to add a new user account. 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. **Note:** 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 **User Account** list and click the **Open** button to view/edit the details of a user account.	
The Delete button	Select a user name from the **User Account** list and click the **Delete** button to delete a user account.	

Viewing or Changing User Account details

To view or change the details of a User Account:

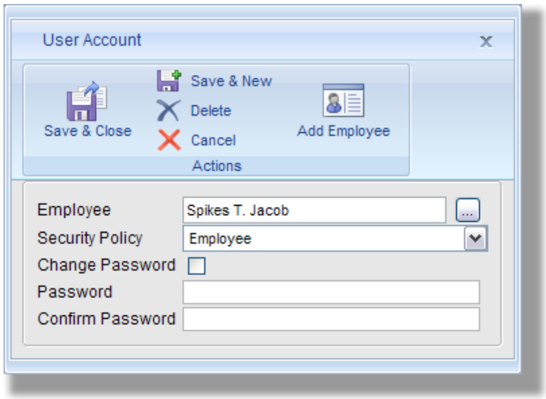
1. Click on the **User Accounts** icon in the **System Configuration** tab.

The User Accounts screen will be displayed.



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.



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

Do this...	To...
Click the **Add Employee** button	Add a new employee record into the system.
Click the **Delete** 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 **User Accounts** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the User Account dialog box	To return to the **User Accounts** screen without saving the new User Account.

Resetting a User's Password

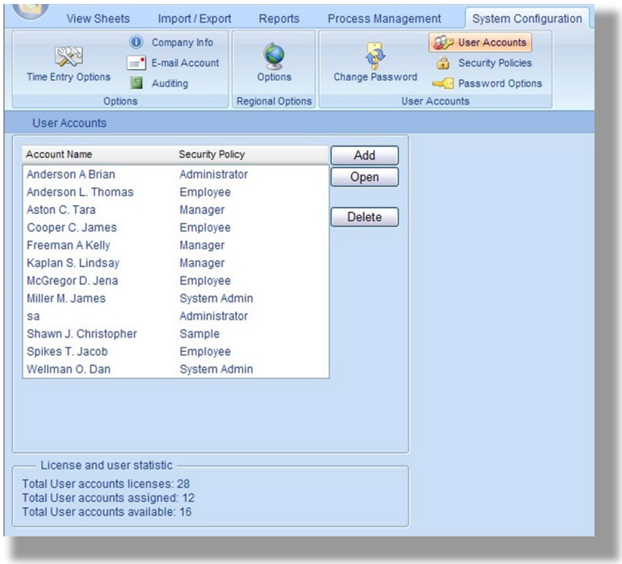
In case a user forgets his/her password, the Systems Administrator can reset the user's password and assign a new password to the user.

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:

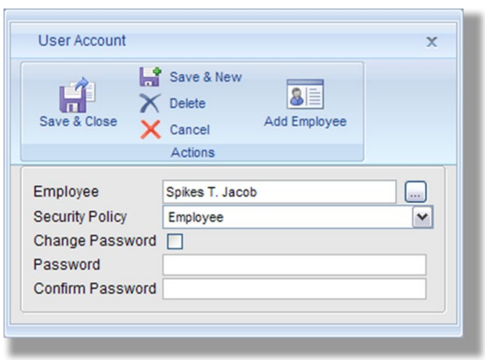
1. Click on **User Accounts** icon in the **System Configuration** tab.

The User Accounts screen will be displayed.



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.



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.

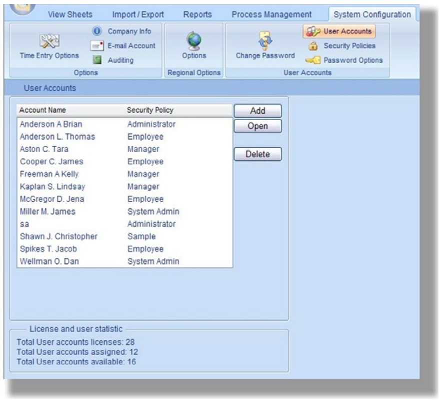
4. Type a new password for the user, in the **Password** field.
5. Re-type the password in the **Confirm Password** field.
6. Click the **Save & Close** button to save the changes and return to the User Accounts screen.
7. Inform the user about the new password. The user should now be able to log in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

Deleting a User's Account

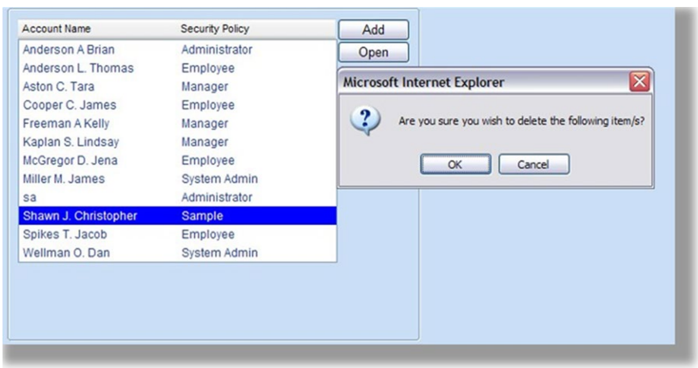
To delete a User Account:

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

The User Accounts screen will be displayed.



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



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.

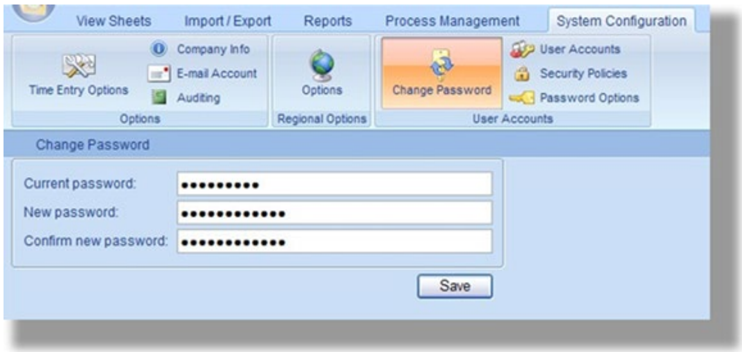
Changing your Password

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.



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).

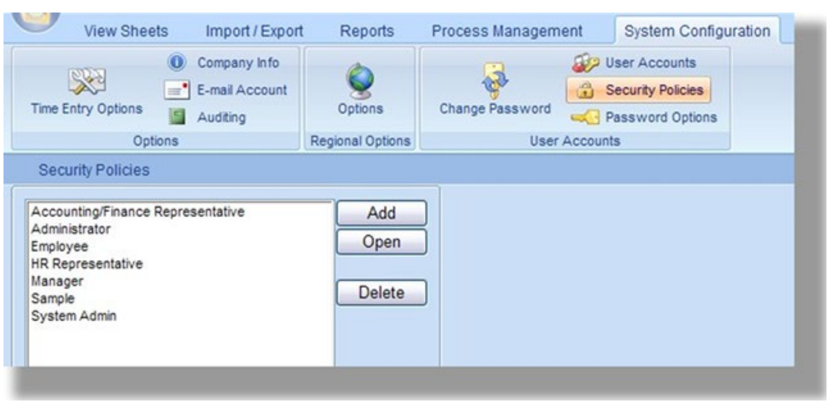
Administrators can use Security Policies to control end users' access to every aspect of Office Timesheets. Thus, administrators can determine precisely how Office Timesheets appears to the end user. With Security Policies you can:

- 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 **Add** button to add a new Security Policy.	
The Open button	Select a Security Policy from the **Security Policies** list and click the **Open** 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 **Security Policies** list and click the **Delete** 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.

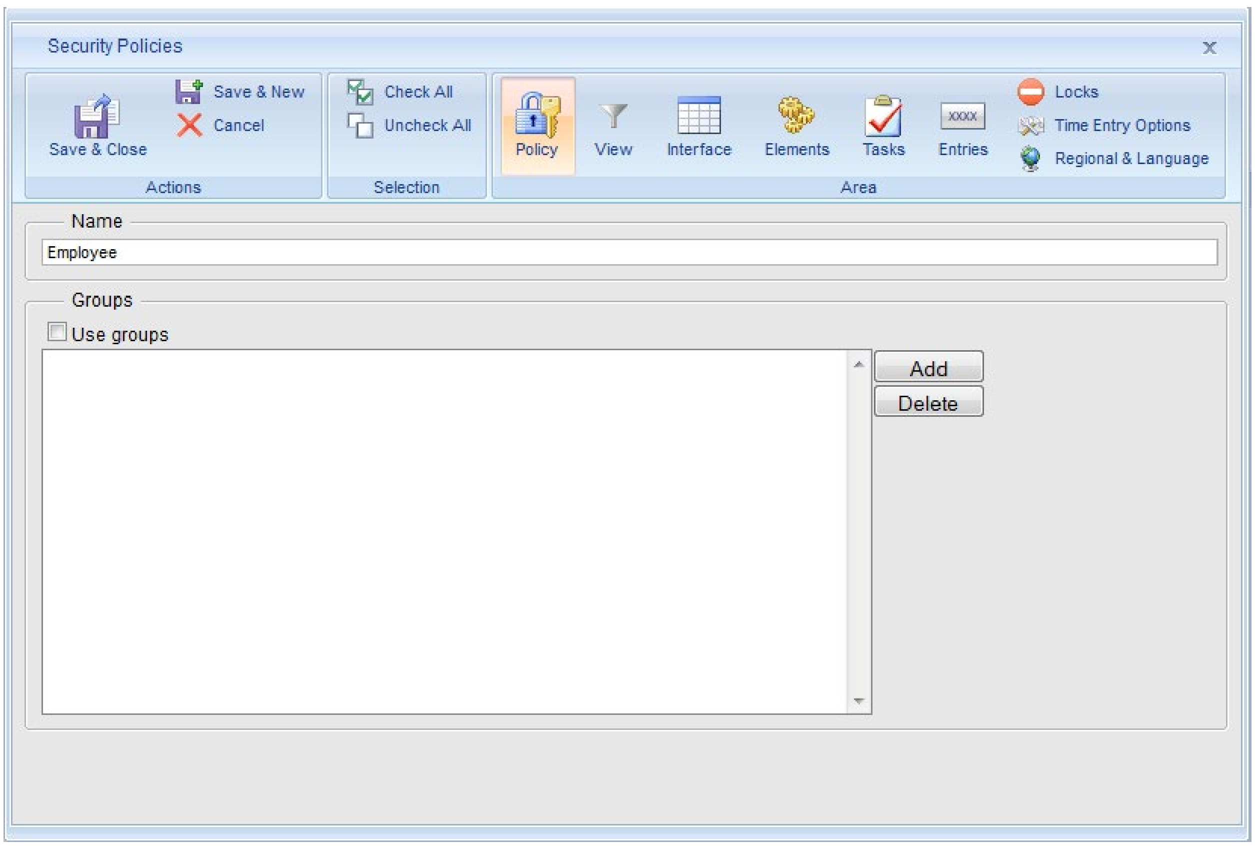
To create a new Security Policy:

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

The Security Policies screen will be displayed.

2. Click the Add button.

The Security Policies dialog box will appear.



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

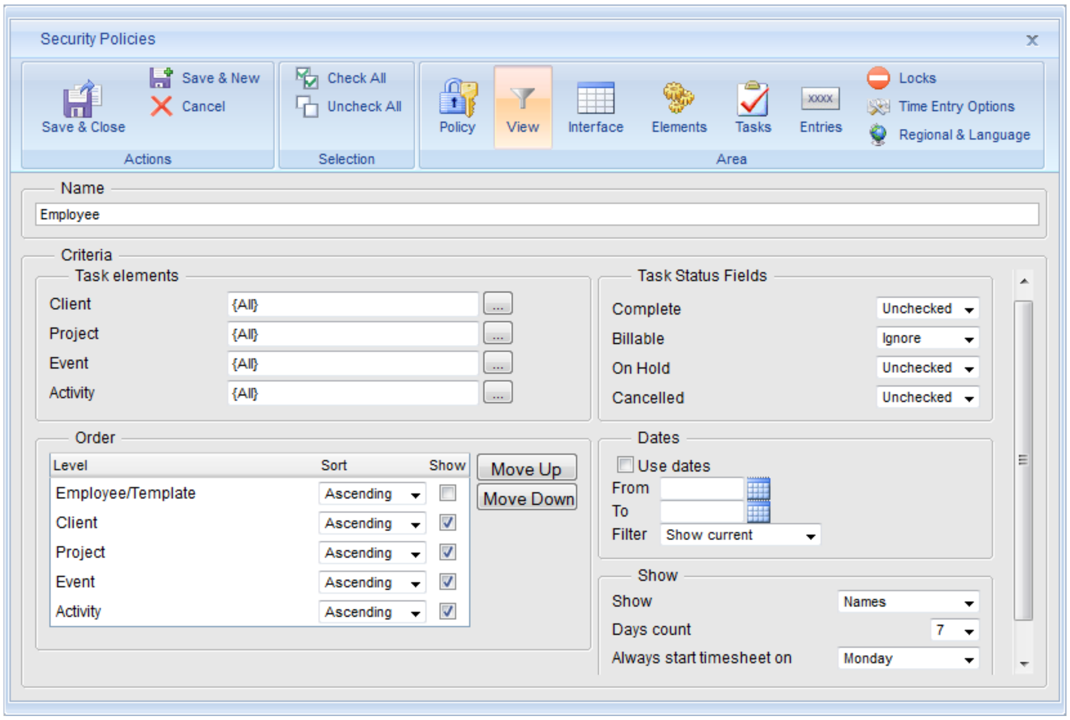
4. Check the Use Group check box if you want to create a security policy for one or more employees that will have group rights to a specified group. This is used when an employee is in more than one group; and any group rights the employee has will only be applied to the groups in which you specify here.

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

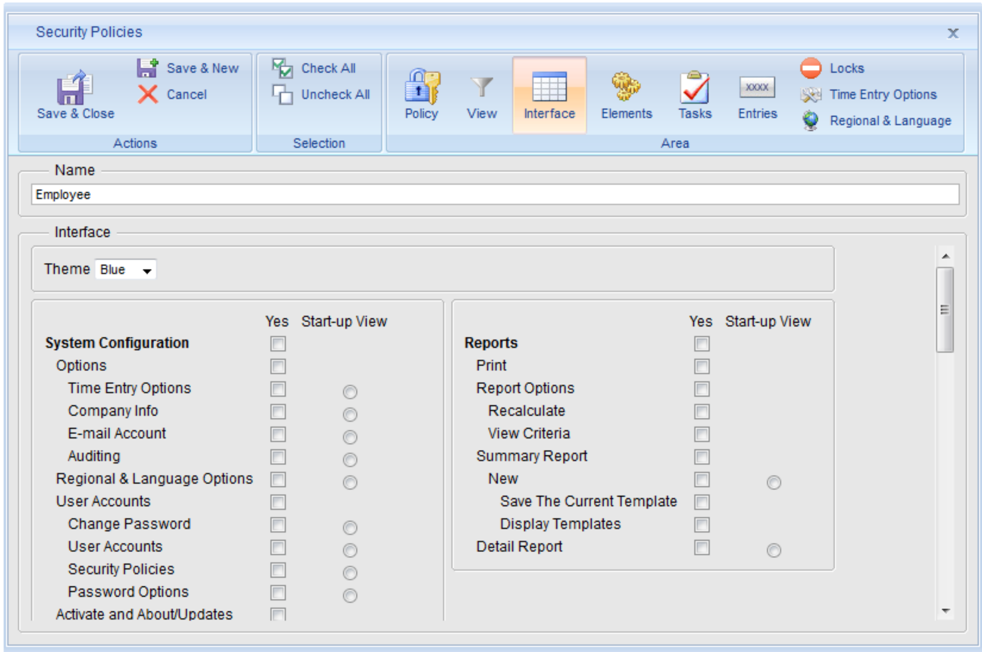
5. Click on the View button to specify the View Criteria settings for users assigned to your security profile.



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.



(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.

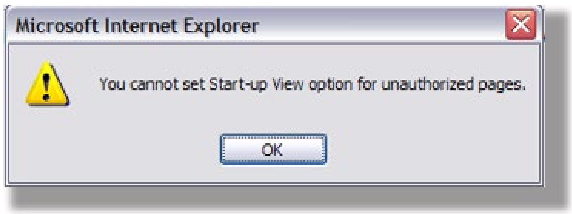
For example, if you check the Change Password item, the system will automatically check the User Accounts and System Configuration items as well (since you need access to the System Configuration tab and the User Accounts ribbon group, in order to get access to the Change Password command/function).

(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.

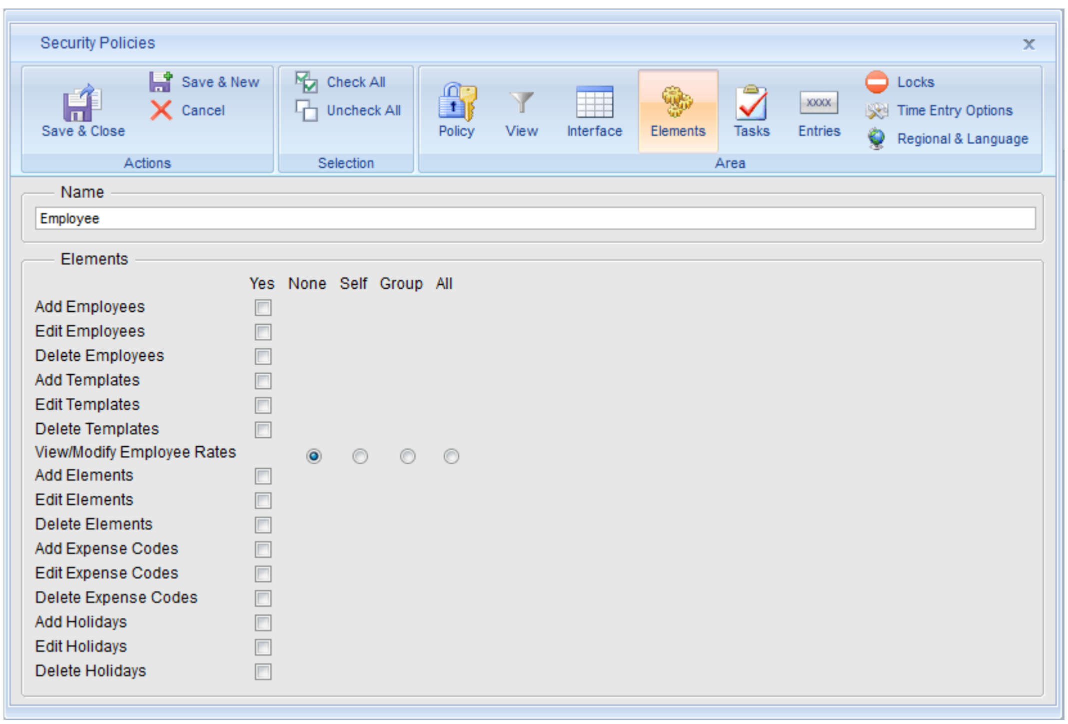
Note: In the case of the check boxes, you can select check boxes from as many of the panels as required. However, you can select only one radio button in the Start-up View column, from all of the panels collectively. The button you select will determine the default opening screen that will be displayed 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:



Providing access to Element-related Functions

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



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

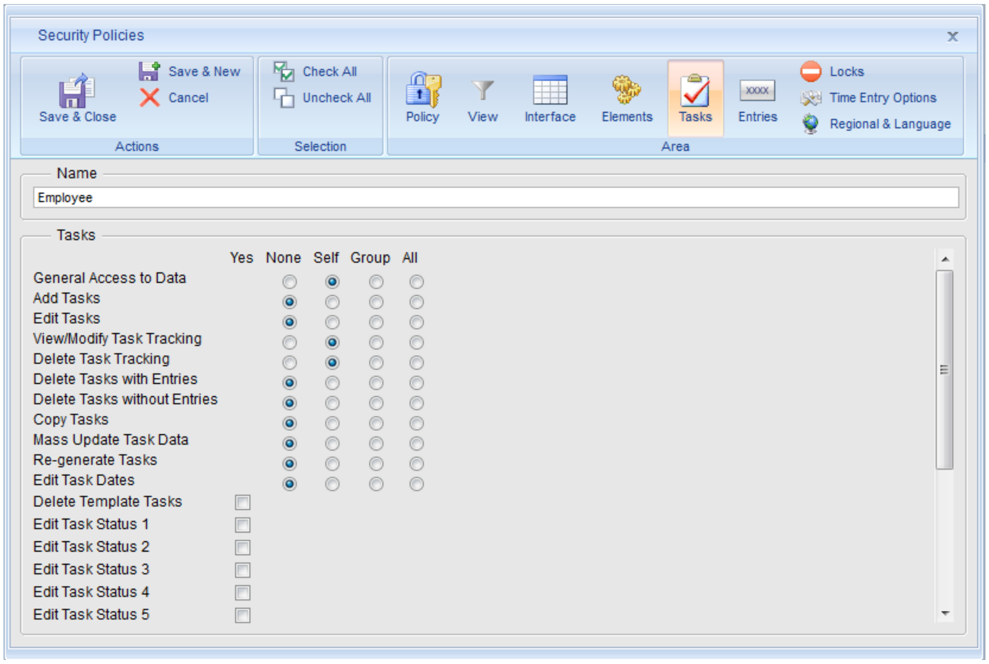
The following table describes the various items in the Elements panel:

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

Item...	Check/Select this item to...	Default Value (if any)
Edit Employees	Allow the user to make changes to Employee entries.	
Delete Employees	Allow the user to delete Employee entries.	
View/Modify Employee Rates	Specify whether the user can view or modify Employee Rates. You can only select one option here. **Select...** / **To...** None: Disallow the user from viewing or modifying Employee Rates. Self: Allow the user to view or modify only his/her own rates. Group: 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.) All: 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 user to add Element entries.	
Edit Elements	Allow the user to make changes to Element entries.	
Delete Elements	Allow the user to delete Element entries.	
Add Expense Codes	Allow the user to add Expense Code entries.	
Edit Expense Codes	Allow the user to make changes to Expense Code entries.	
Delete Expense Codes	Allow the user to delete Expense Codes entries.	
Add Holidays	Allow the user to add Holiday entries.	
Edit Holidays	Allow the user to make changes to Holiday entries.	
Delete Holidays	Allow the user to delete Holiday entries.	
Super Delete for Elements and Employees	Allows the user to delete element items and employee records with linked data (linked to groups, dependencies, time entries, expense entries, etc. (use caution when granting access to this function)	

Providing access to Task-related Functions

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



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

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

Item...	Check/Select this item to...	Default Value (if any)
General Access to Data	Specify whether the user has general access to task-related data. You can only select one option here. **Select...** — **To...** None — Disallow the user from viewing or modifying task-related data. Self — Allow the user to view or modify only his/her own task-related data. 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.)	None
Add Tasks	Specify whether the user can add tasks. You can only select one option here. **Select...** — **To...** None — Disallow the user from adding tasks. Self — Allow the user to add only his/her own tasks. Group — 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	None

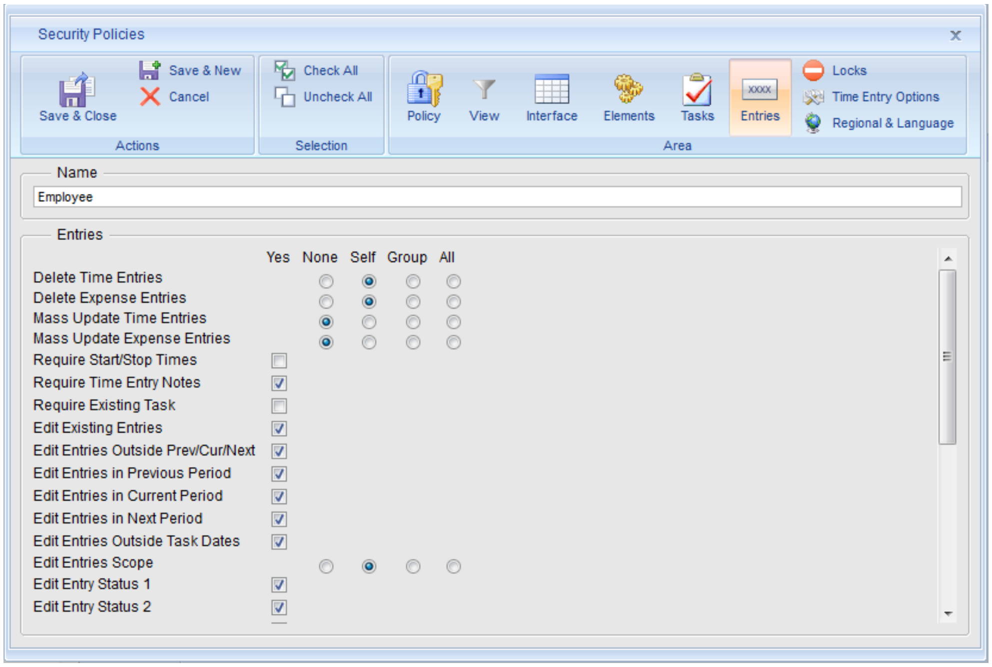
Item…	Check/Select this item to…	Default Value (if any)
	for Group managers or Team leaders.) All — Allow the user to add tasks for any employee of the organization. (This would be an ideal choice for Managers.)	
Edit Tasks	Specify whether the user can make changes to tasks. You can only select one option here. **Select…** — **To…** None — Disallow the user from editing tasks. Self — Allow the user to edit only his/her own tasks. Group — 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.) All — Allow 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. **Select…** — **To…** None — Disallow the user from viewing or modifying task tracking data. Self — Allow the user to view or modify only his/her own task tracking data. Group — Allow 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.) All — Allow 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. **Select…** — **To…** None — Disallow the user from deleting task tracking data. Self — Allow the user to delete only his/her own task tracking data Group — Allow 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.) All — Allow 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. Group — 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.) All — Allow the user to delete tasks with entries or notes of any employee of the organization. (This would 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. **Select...** — **To...** None — Disallow the user from deleting empty tasks. Self — Allow the user to delete only his/her own empty tasks. Group — Allow the user to delete empty tasks 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 delete empty tasks of any employee of the organization. (This would be an ideal choice for Managers.)	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. **Select...** — **To...** None — Disallow the user from copying tasks. Self — Allow the user to copy only his/her own tasks to other users. Group — 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.) All — Allow 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)
	Self	Allow the user to mass update only his/her own task entries.	
	Group	Allow 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 would be an ideal choice for Group managers or Team leaders.)	
	All	Allow the user to mass update task entries of any employee of the organization. (This would be an ideal choice for Managers.)	
Re-generate Tasks	Specify whether the user can generate tasks from non-task based entries. You can only select one option here.		None
	Select...	**To...**	
	None	Disallow the user from re-generating tasks.	
	Self	Allow the user to re-generate only his/her own tasks.	
	Group	Allow 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.)	
	All	Allow the user to re-generate tasks for any employee of the organization. (This would be an ideal choice for Managers.)	
Edit Task Dates	Specify whether the user can make changes to the task start and end dates. You can only select one option here.		None
	Select...	**To...**	
	None	Disallow the user from editing task dates.	
	Self	Allow the user to edit only his/her own task dates.	
	Group	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.)	
	All	Allow the user to edit task dates for any employee of the organization. (This would be an ideal choice for Managers.)	
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.



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

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

Item...	Check/Select this item to...	Default Value (if any)
Delete Time Entries	Specify whether the user can delete time entries. You can only select one option here. **Select...** **To...** None: Disallow the user from deleting time entries. Self: Allow the user to delete only his/her own time entries. 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.) All: Allow the user to delete time entries of any employee of the organization. (This would be an ideal choice for Managers.)	None
Delete Expense Entries	Specify whether the user can delete expense entries. You can only select one option here. **Select...** **To...**	None

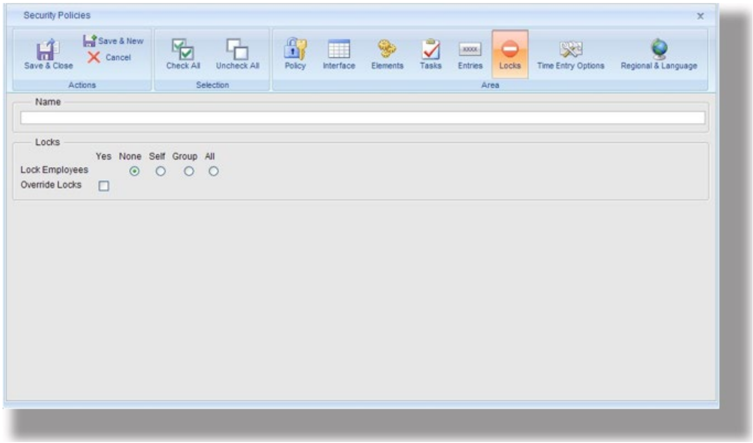
Item...	Check/Select this item to...	Default Value (if any)
	None — Disallow the user from deleting expense entries. Self — Allow the user to delete only his/her own expense entries. Group — Allow the user to delete expense entries of anyone in his/her group (or in the groups that have been added to the security policy). (This would be an ideal choice for Group managers or Team leaders.) All — Allow the user to delete expense entries of any employee of the organization. (This would be an ideal choice for Managers.)	
Mass Update Time Entries	Specify whether the user can perform mass updation of time entries. You can only select one option here. **Select...** — **To...** None — Disallow the user from mass updating time entries. Self — Allow the user to mass update only his/her own time entries. Group — Allow the user to mass update 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.) All — Allow the user to mass update time entries of any employee of the organization. (This would be an ideal choice for Managers.)	None
Mass Update Expense Entries	Specify whether the user can perform mass updation of expense entries. You can only select one option here. **Select...** — **To...** None — Disallow the user from mass updating expense entries. Self — Allow the user to mass update only his/her own expense entries. Group — Allow the user to mass update expense entries of anyone in his/her group (or in the groups that have been added to the	None

Item...	Check/Select this item to...	Default Value (if any)
	security policy). (This would be an ideal choice for Group managers or Team leaders.) All — 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.	
Require Time Entry Notes	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. **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 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 **Task** 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. **Select... / To...** None – Disallow the user from editing the scope of the entries. Self – Allow the user to edit the scope of only his/her own entries. Group – Allow 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.) All – Allow 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.



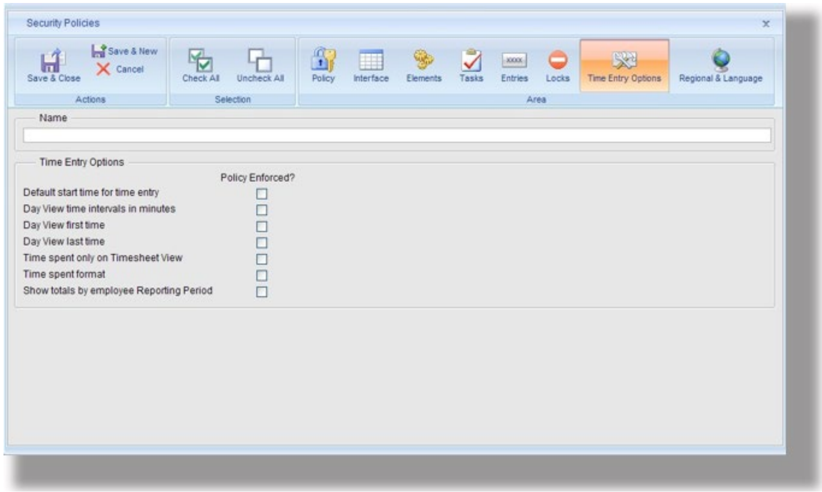
Use this panel to specify the Lock-related operations that the user is permitted to perform.

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

Item...	Check/Select this item to...	Default Value (if any)
Lock Employees	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 made by employees. Self — Allow the user to lock only his/her own entries. Group — 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.) All — 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.



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

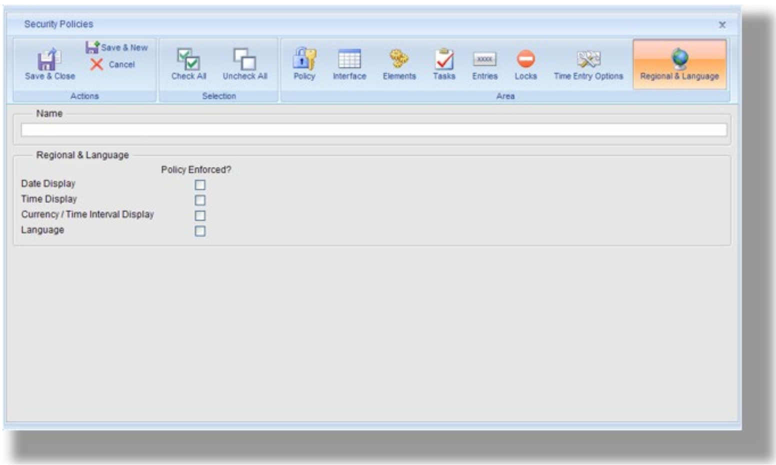
Note: Time entry options can either be set by individual users (if they are given access to the Time Entry Option area of the System Configuration tab), or can be enforced via the Security Policy assigned to the user.

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 **Regional Options** screen.	
Time Display	Force the display of time values with the time display format specified in the **Regional Options** screen.	
Currency/Time Interval Display	Force the display of currency or time values with the currency/time interval display format specified in the **Regional Options** screen.	
Language	Force the use of the language specified in the **Regional Options** 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.

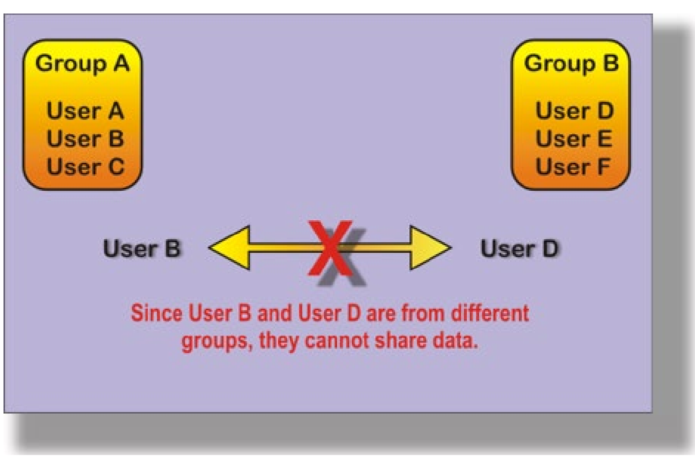
Saving the Security Policy

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

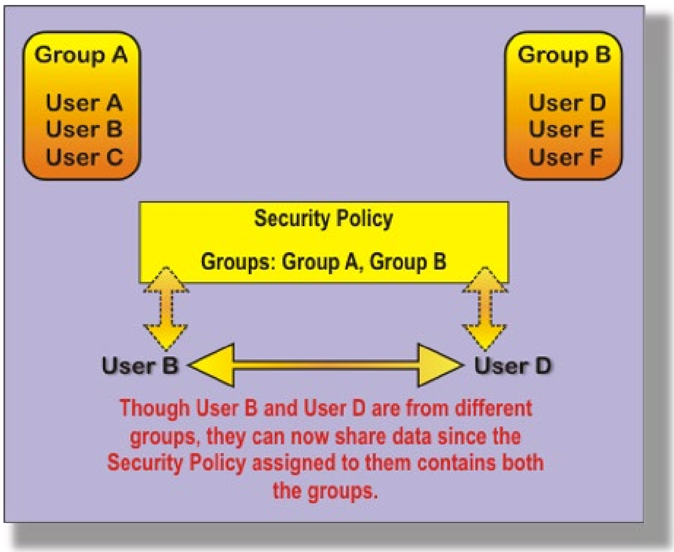
Do this...	To...
Click the **Save & New** button	Save this Security Policy and start creating a new Security Policy.
Click the **Save & Close** button	Save this Security Policy and return to the **Security Policies** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the Security Policy dialog box	Return to the **Security Policies** 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.

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…	To…
Click the **Save & New** 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 **Security Policies** Screen.
Click the **Cancel** button or the **Close** button on the top right corner of the User Account dialog box	Return to the **Security Policies** screen without saving the changes that you have made to the Security Policy.

Deleting a Security Policy

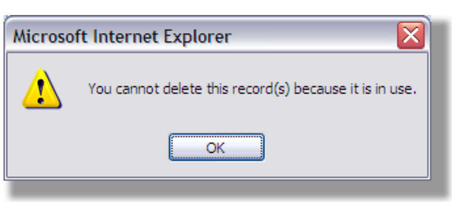
To Delete a Security Policy:

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

The Security Policies screen will appear.

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:



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, **Office Timesheets** 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 **Clear** button to delete all the values from the fields on the page.	
The Reset button	Click the **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	

Item	How to use the Item	Default Value (if any)
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

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.

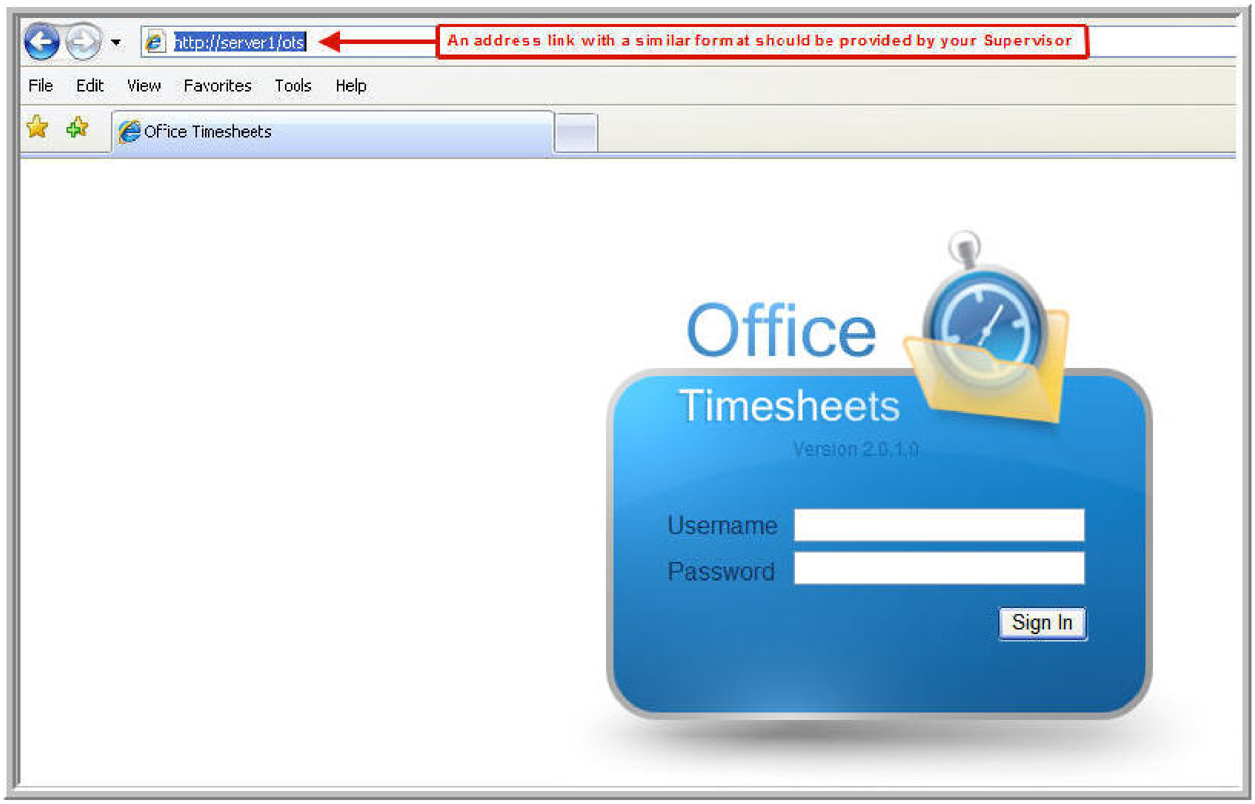
To Configure the Password Options:

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.

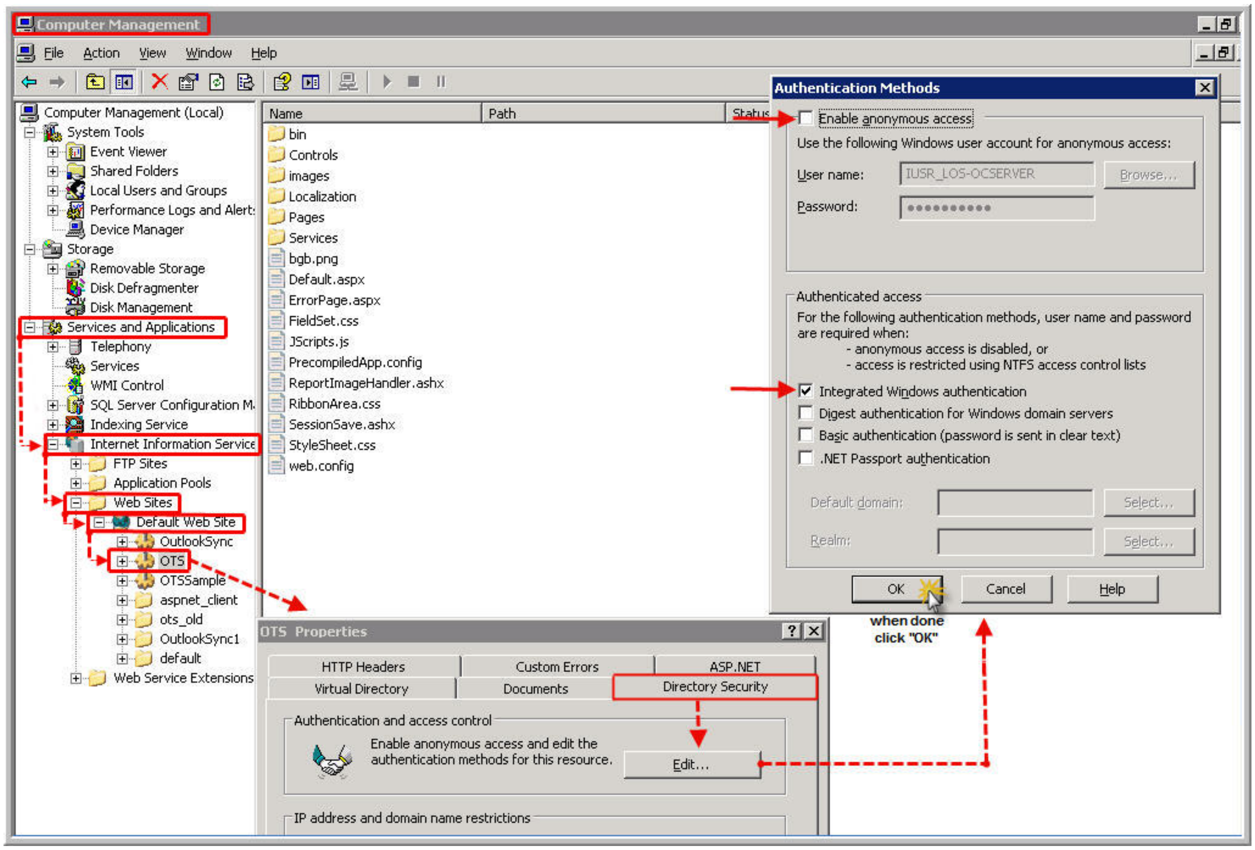


2. Next, go to the "System Configuration" tab and choose the "Password Options" button.
3. Select "Windows Authentication" from the drop down menu and then enter your network's domain name in the "Windows domain name" field. Then select "Save" and log out of Office Timesheets.

*****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).

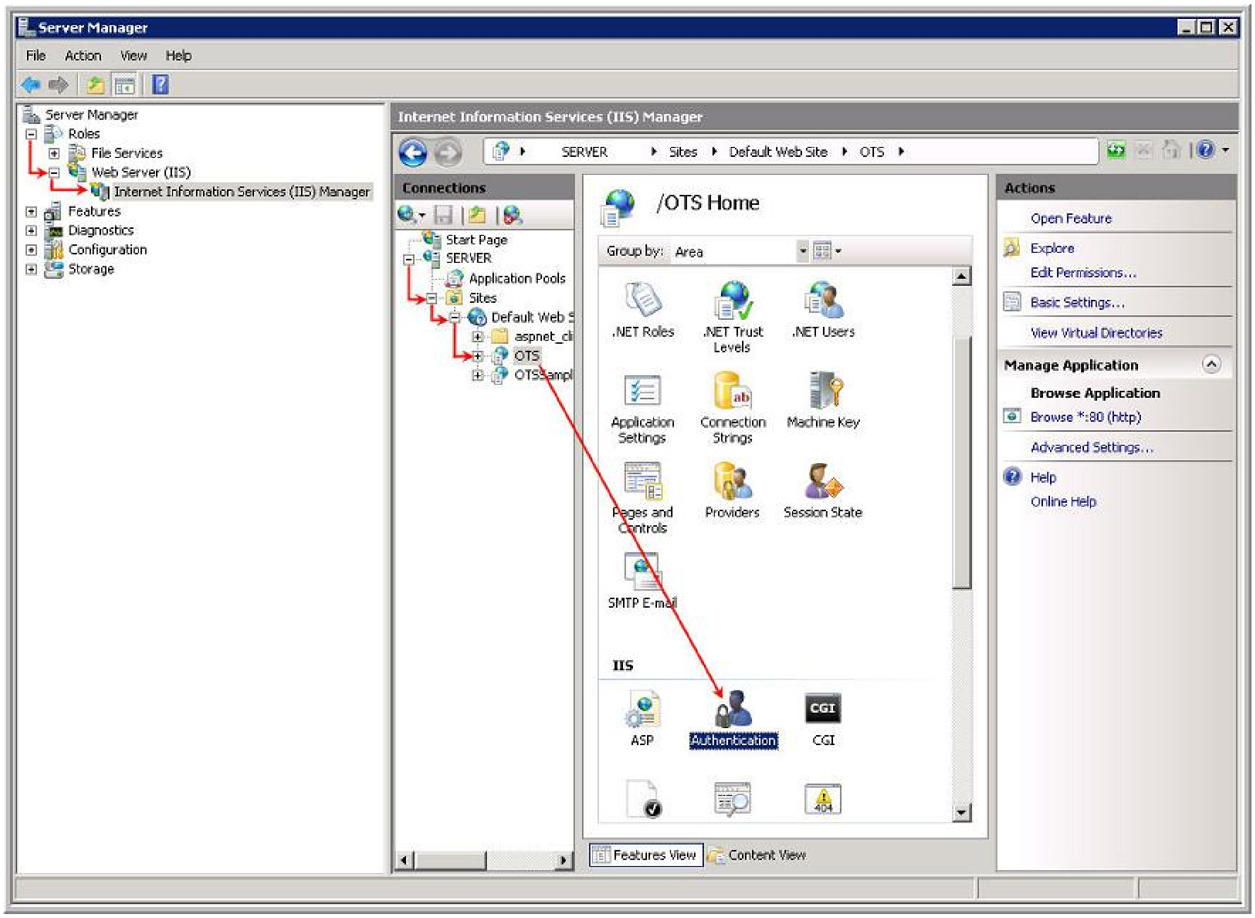


***** Server 2008****

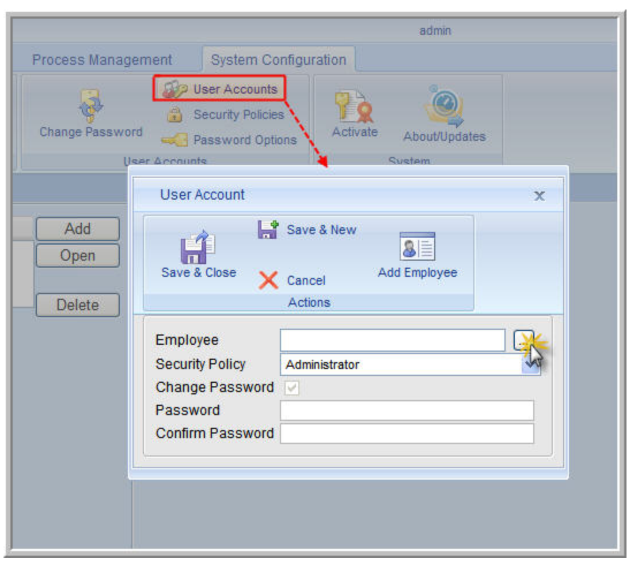
Right click on the "Computer" icon and select "Manage", which will bring up the "Server Manager" console.

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

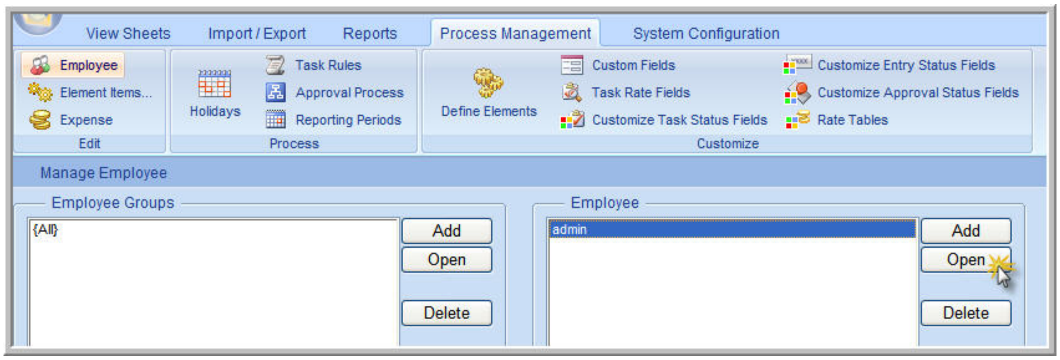
Highlight "OTS"(default) or the Virtual name that was created during Office Timesheets installation. While in "Features View", double-click "Authentication".



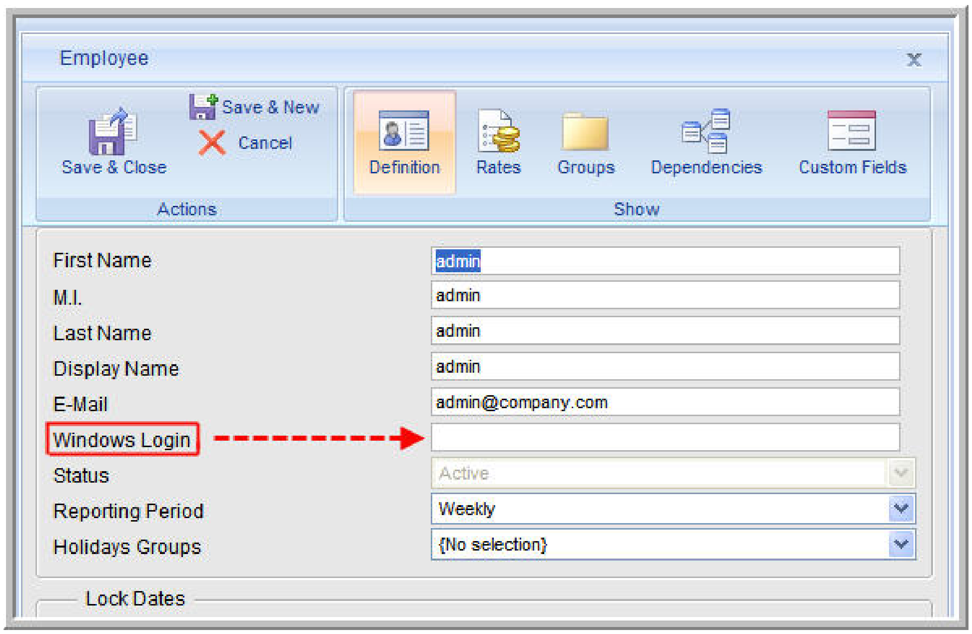
1. Log back into Office Timesheets with the Administrator login.
2. Next click on the "System Configuration" tab and choose the "User Accounts" button. Select the "Add" button and choose your Employee by clicking on the [...] button next to the "Employee" field. Enter in the Employee's Windows Profile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



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



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



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.

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...	To...
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 **Status Fields** panel of the **Task** dialog box.
Customize Entry Status Fields	Set up entry status values to be displayed in the **Status Fields** panel of the **Time Entry** dialog box.
Customize Approval Status Fields	Set up approval status values to be displayed in the **Approval Status** drop-down list of the **Time Entry** 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 **Timesheet View**.
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 **Define Elements** 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.

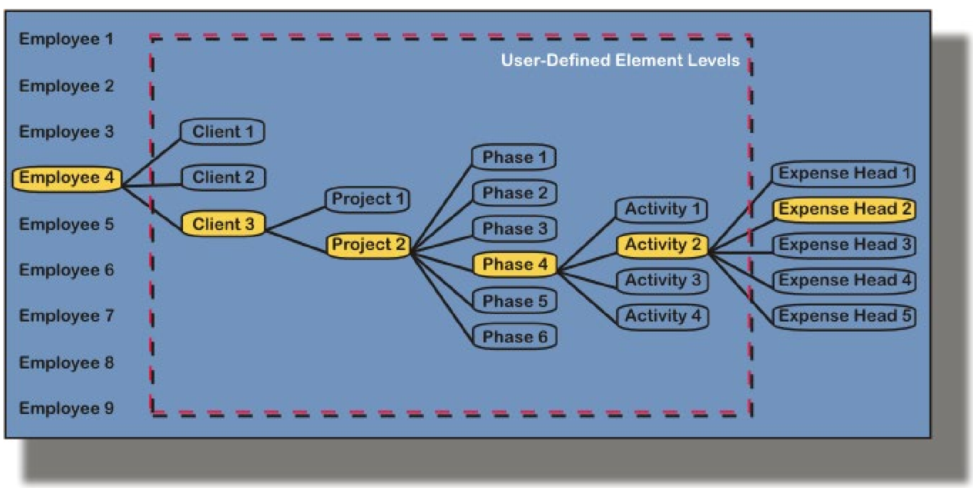
By default, Office Timesheets is setup with four Element Levels:

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.

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 re-activate 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 **Task** dialog box. They also appear in the drop-down menus that are displayed when you click on the **Element Items…** and **Custom Fields** buttons. **NOTE:** The **Name** field can also be used to rename the pre-defined **Employee** and **Expense** 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 **Reset** button to undo your changes and restore	

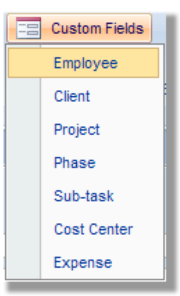
Item	How to use the Item	Default Value (if any)
	the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **NOTE:** If you move to some other page before clicking the **Save** button, the 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.	

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:

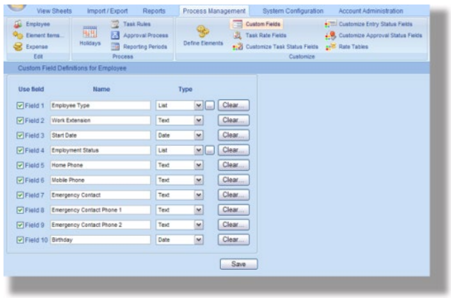
1. Click on Custom Fields in the Process Management tab.

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



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.



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

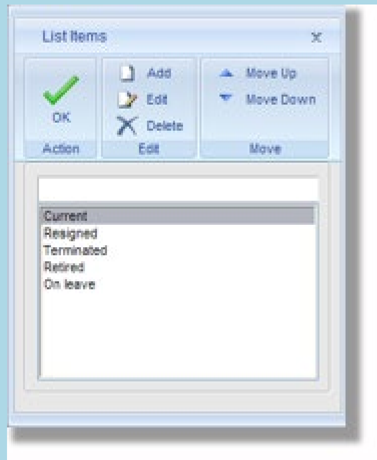
Item	How to use the Item	Default Value (if any)
Use field	Check this check box in front of a custom field to use that field. Uncheck the check box to stop using the custom field. **TIP:** If you deactivate a field (by unchecking it) the details or entries of that field still remain within Office Timesheets 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 **Custom Fields** panel of the related element entry dialog box. For example, if you are defining the custom fields for **Employees**, the field names you specify will be displayed in the **Custom Fields** panel of the **Employee** dialog box.	
Type	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— ○ Text ○ Date ○ Integer ○ Number ○ Currency ○ List ○ E-mail Address For more information about field types, see *Custom Field Types*.	Text

Item	How to use the Item	Default Value (if any)
The Clear... button	Click the **Clear...** button to delete the details that have been entered in that custom field, from all the entries that have been made by the users. For example, in the **Custom Field Definitions for Employee** screen, if you click the **Clear...** button in the same row as the **Birthdate** field, Office Timesheets will delete the birthdate details from all the Employee entries. In other words, the **Clear...** button will reset the contents of the field in all entries to its default value.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

Custom Field Types

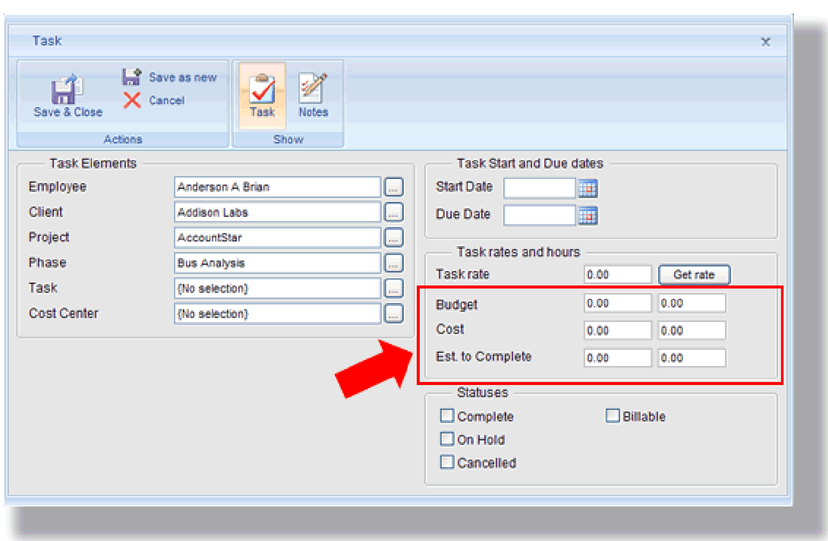
While defining custom fields for the various elements, you have to select the type of the field from the Type drop-down list. The type of the field determines the type of data that can be stored in the field. The Type drop-down list contains the following values:

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 **Date**.
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

Value…	What happens if you select this value…
	a value from the drop-down list. When 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 values to the drop-down list.
E-mail address	The user will only be allowed to enter a properly formatted e-mail address in the field.

Defining Task Rate Field Labels

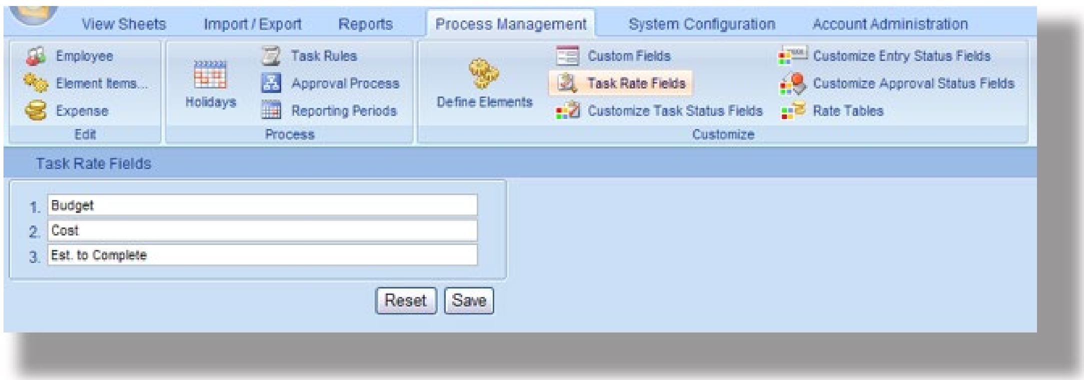
While entering Task details in the Task dialog box, Office Timesheets provides you with an area to enter the Task Rates and Hours. With the exception of the Task Rate field, you can give your own user defined labels to the other task rate fields.



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.



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

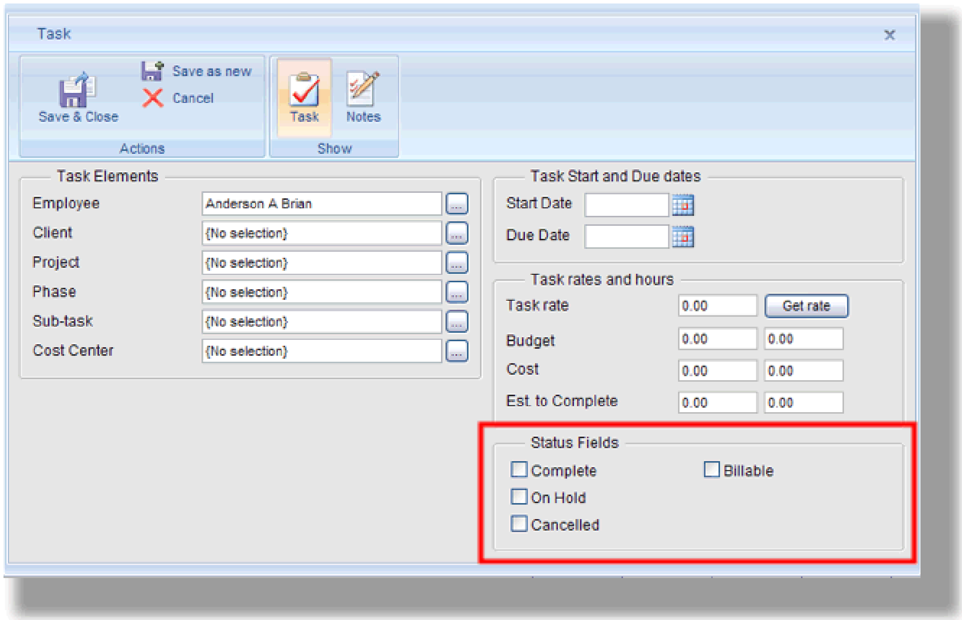
2. Type the names for these fields in the text boxes provided and click the Save button.

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 **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

Customizing Task Status Values

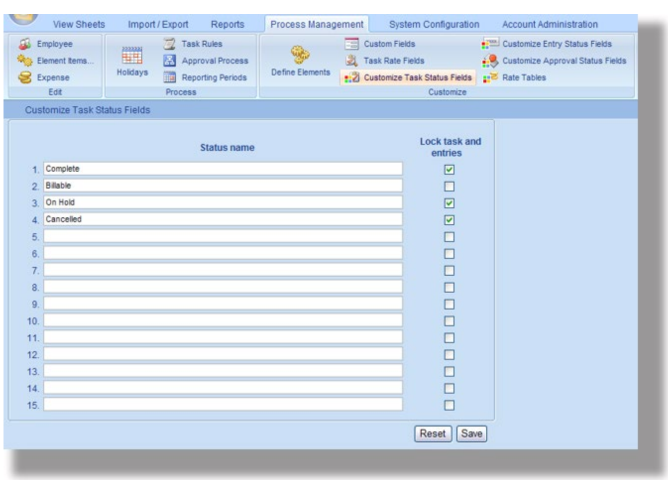
When making a task entry, you can indicate the status of the task, by checking one or more values in the Status Fields panel of the Task dialog box. (You can also update the Task Status by using the Task Status Fields in the Mass Update screen.)



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.



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 **Status name** text box. You can specify upto 15 Task Status values. The values that you specify here will appear in the **Status Fields** panel of the **Task** dialog box and the **Task Status Fields** panel of the **Mass Update** 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 **Status Fields** panel in the **Task** 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 **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

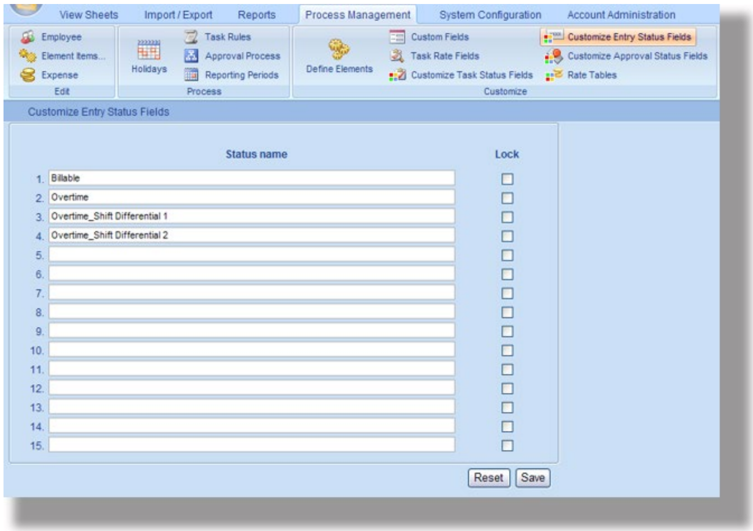
Customizing Entry Status Values

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.



2. Add upto 15 status values in the text boxes.
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 **Status Fields** panel of the **Time Entry** dialog box and the **Entry Status Fields** panel in the **Mass Update** 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 **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **Note:** If you move to some other page before clicking the **Save** 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 **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.	

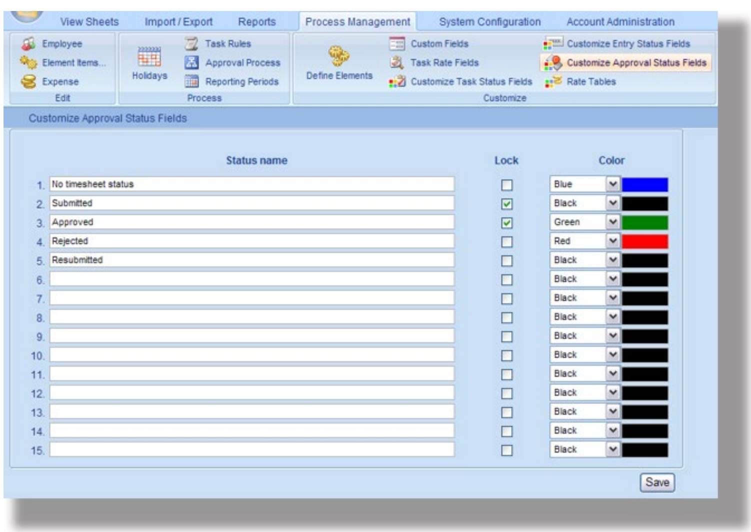
Customizing Approval Status Values

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.



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 **Approval Status** drop-down list of the **Time Entry** and **Mass Update** dialog boxes.	
Lock	Check this check box if you want to lock the time entry when this status is selected from the **Approval Status** 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 **Color** 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 **Approval Status** drop-down list.	Black
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

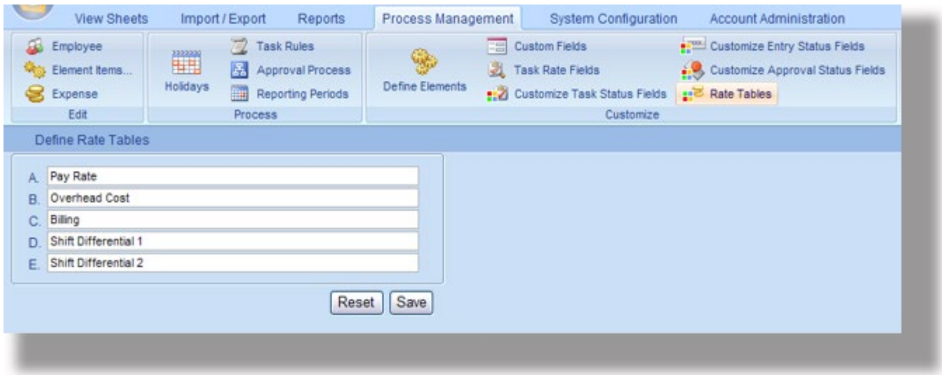
Defining Rate Table Labels

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.



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)
A.	Type the name for the first rate table	A
B.	Type the name for the second rate table	B
C.	Type the name for the third rate table	C
D.	Type the name for the fourth rate table	D
E.	Type the name for the fifth rate table	E
The Reset button	Click the **Reset** button to undo your changes and restore the values entered in the fields back to what they were when you *last* saved the page.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

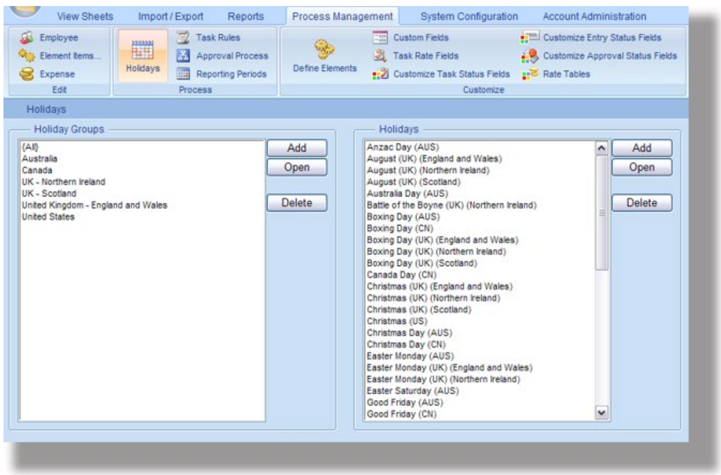
Holidays and Holiday Groups

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:



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 **Holidays** panel will change to show only those holidays which belong to the selected group.	
The Add Button	Click the **Add** button to create a new Holiday Group.	
The Open Button	Select a Holiday Group from the list and click the **Open** button to view or change the details of the Holiday Group.	
The Delete Button	Select a Holiday Group from the list and click the **Delete** 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 **Add** button to create a new Holiday entry.	
The Open Button	Select a Holiday from the list and click the **Open** button to	

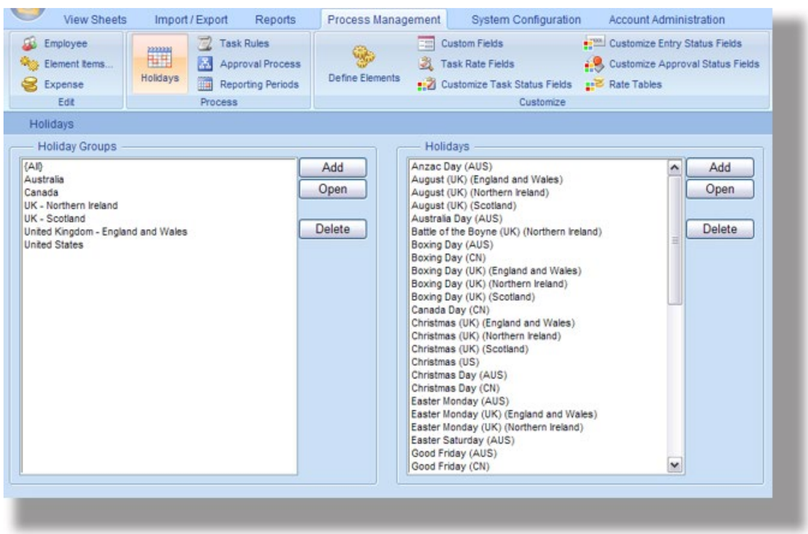
Item	How to use the Item	Default Value (if any)
	view or change the details of the Holiday.	
The Delete Button	Select a Holiday from the list and click the **Delete** button to delete the selected Holiday.	

Creating a Holiday Entry

To create a Holiday entry:

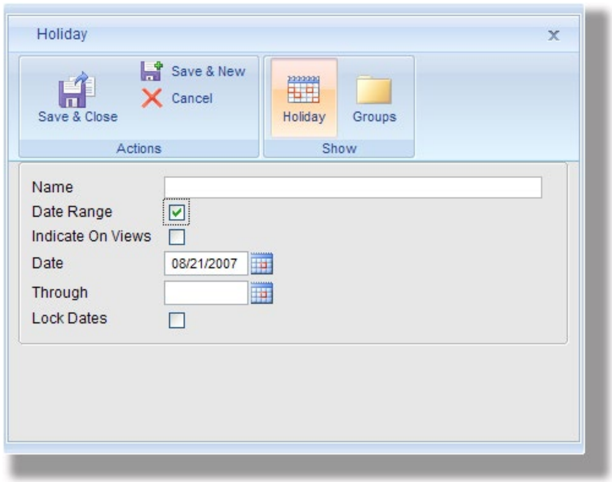
1. Click on Holidays in the Process Management tab.

The Holidays screen will appear.



2. Click the Add button in the Holidays panel.

The Holiday dialog box will appear.



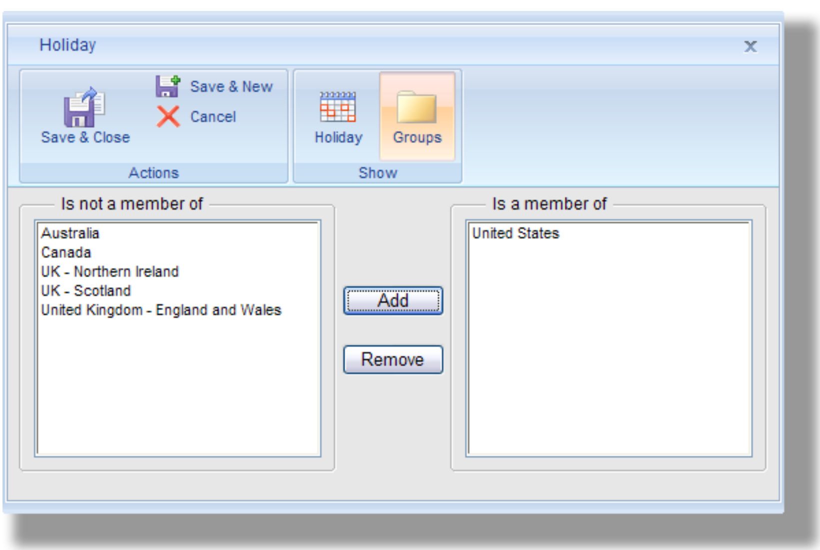
3. In the Name box, type a unique name for the Holiday entry.
4. Check the Date Range check box if the holiday extends to two or more days. If the Holiday only lasts for one day then leave this box unchecked.
5. Check the Indicate on Views check box if you want the holiday to be displayed on the Timesheet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



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…

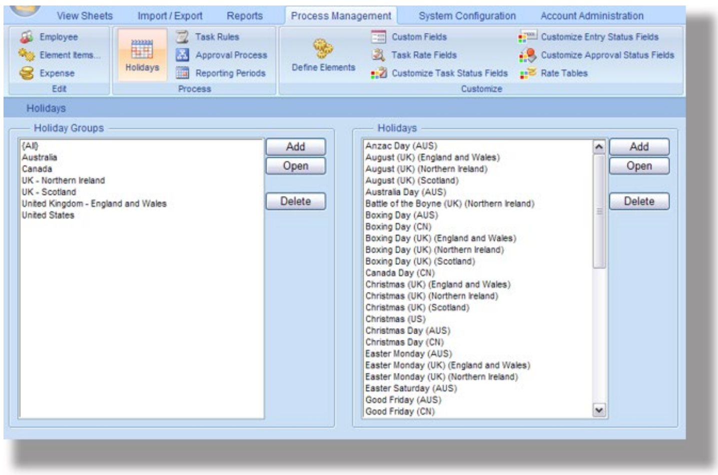
Do this...	To...
Click the **Save & New** button	Save this Holiday entry and start creating a new Holiday entry.
Click the **Save & Close** button	Save this Holiday entry and return to the **Holidays** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Holiday**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

Viewing or Making Changes to a Holiday Entry

To view or make changes to a Holiday entry:

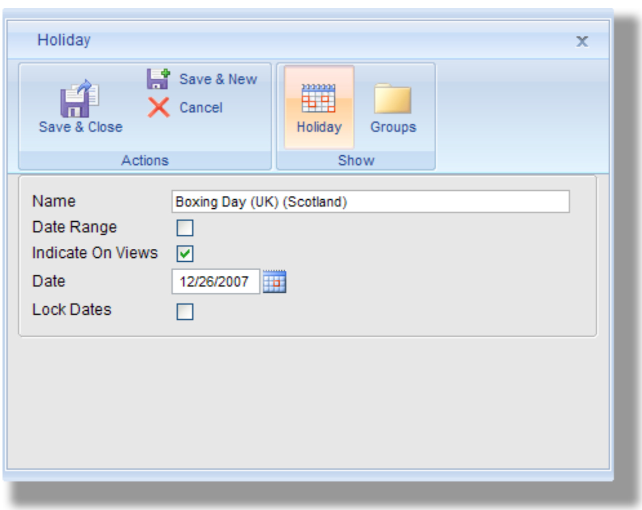
1. Click on the **Holidays** icon in the Process Management tab.

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…

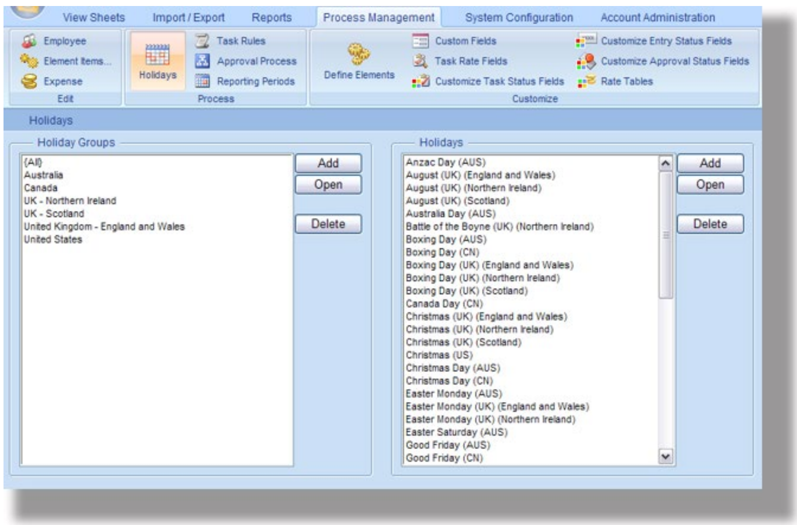
Do this…	To…
Click the **Save & New** button	Save the changes to the Holiday entry and start creating a new Holiday entry.
Click the **Save & Close** button	Save the changes to the Holiday entry and return to the **Holidays** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Holiday** dialog box	Return to the **Holidays** 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…



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

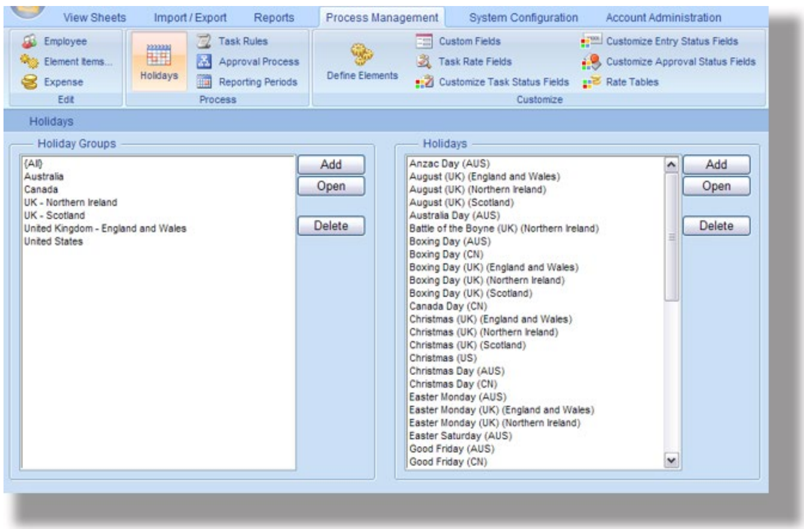
Once you have created the Holiday entries, you need to allot them to one or more Holiday Groups. You can then assign these Holiday Groups to employees, so that the holidays appear on their Timesheets and Expense sheets.

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:

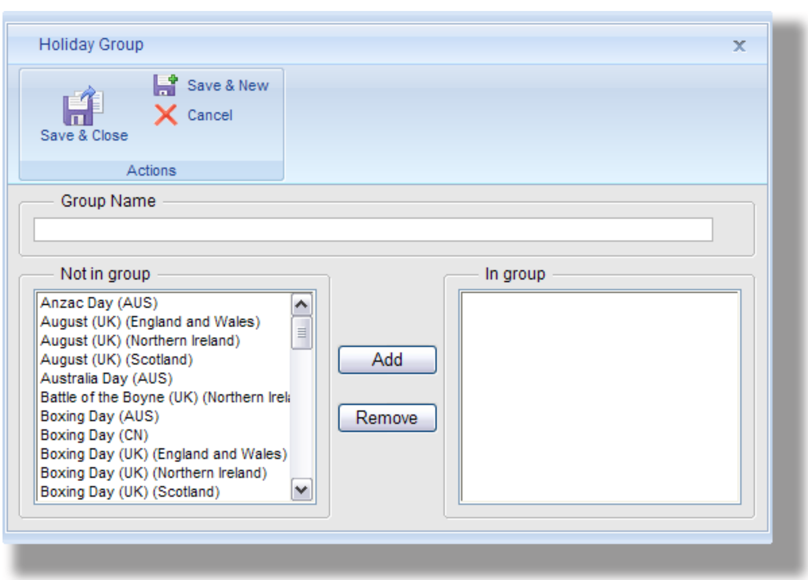
1. Click on the Holidays icon in the Process Management tab.

The Holidays screen will appear…



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

The Holiday Group dialog box will appear…



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...

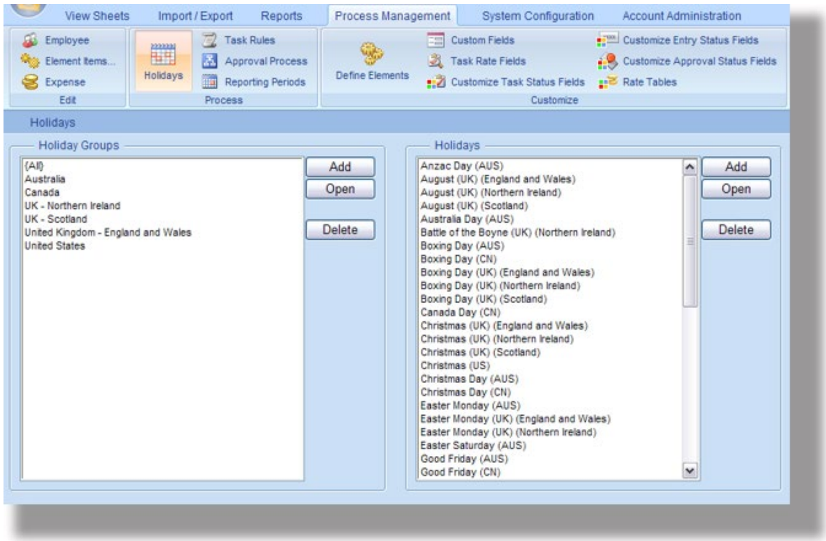
Do this...	To...
Click the **Save & New** button	Save this Holiday Group entry and start creating a new Holiday Group entry.
Click the **Save & Close** button	Save this Holiday Group entry and return to the **Holidays** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Holiday** dialog box	Return to the **Holidays** 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:

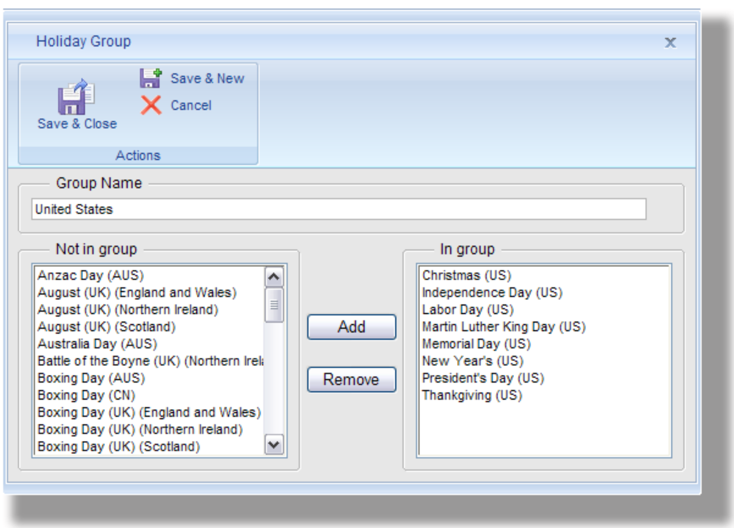
1. Click on the **Holidays** icon in the Process Management tab.

The Holidays screen will appear…



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

The Holiday Group dialog box will appear...



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...	To...
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 **Holidays** screen.
Click the **Cancel** button or the	Return to the **Holidays** screen without saving your changes.

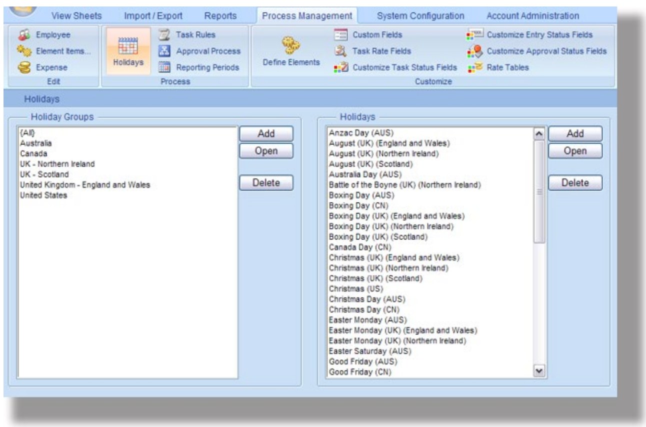
Do this...	To...
Close button on the top right corner of the **Holiday Group** dialog box	

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…



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.

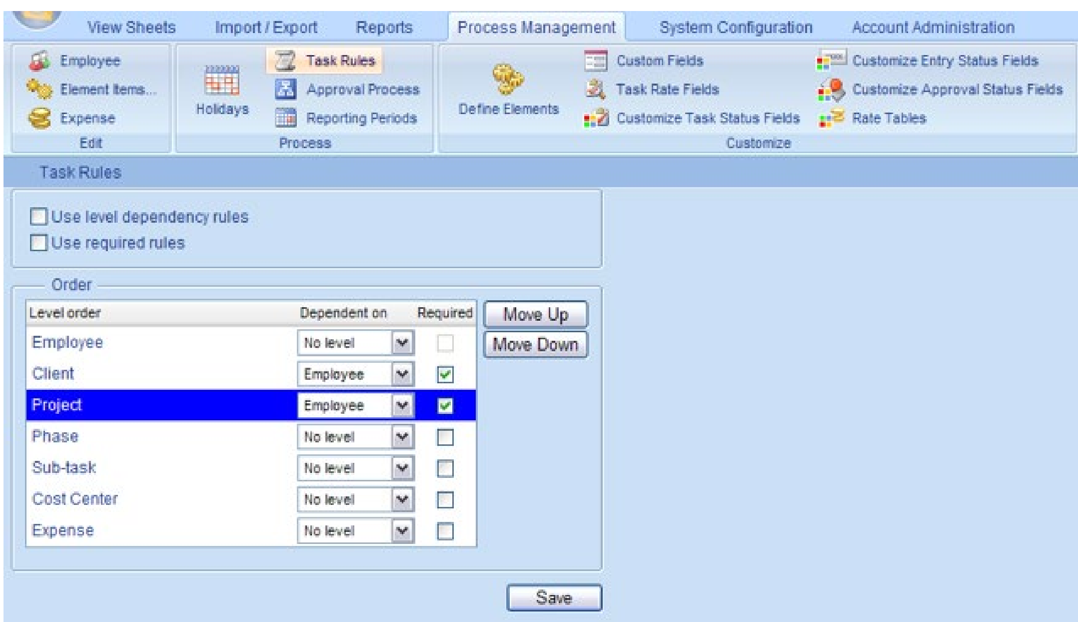
Using element level dependencies, you can specify the order of the elements available for task creation where each element depends upon a previously entered element level. Essentially, dependencies allow you to define what elements can and cannot be used for creating tasks based on previous element level 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.



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:

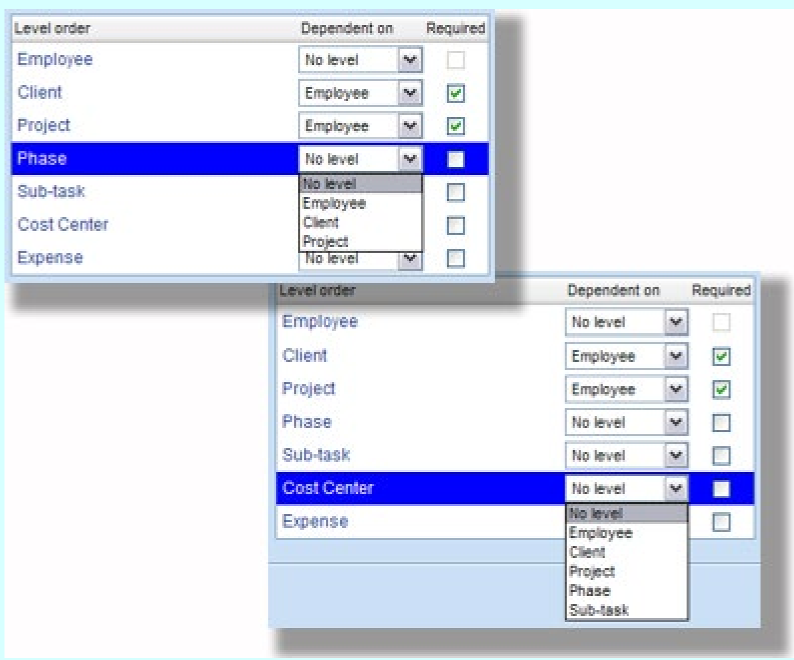
Item	How to use the Item	Default Value (if any)
Use level dependency rules	Check the **Use level dependency rules** check box if you want Office Timesheets to enforce the level dependency rules that you have defined. If level dependency rules are enforced, then while making a Task entry, Office Timesheets 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. **NOTE:** If you uncheck the **Use level dependency rules** check box, Office Timesheets will not enforce the level dependency rules even though you may have defined them.	
Use required rules	Check the **Use required rules** 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. **NOTE:** If you uncheck the **Use required rules** check box, Office Timesheets will not enforce the required rules even though you may have defined them.	
The Order panel	The **Order** panel displays all the elements that you have defined in the **Define Elements** screen. Using the buttons in the **Order** 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 **Define Elements** screen appear in this column. You can specify the order in	

<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td></td><td>which the elements should appear in the Task 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.</td><td></td></tr>
<tr><td>Dependent on</td><td>

If an element depends on some other element, from the **Dependent on** drop-down list for that element, select the name of the other element. For example, if Project depends on Client, select Client from the **Dependent on** drop-down list of Project.

Note: An element can be dependent upon any element that appears before (i.e. above) it in the **Order** 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 **Dependent on** drop-down list contains the names of the elements that appear before (above) it in the **Order** panel.



TIP: Select 'No level' from the **Dependent on** 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 **Dependent on** drop-down list of the Project row.

</td><td></td></tr>
</table>

Item	How to use the Item	Default Value (if any)
Required	Check the **Required** 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. **NOTE:** The **Required** check box is grayed out for **Employee**. 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 **Move Up** 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 **Move Down** button to move the element one position lower in the level order.	
The Save button	Click the **Save** button to save any changes you make to the page. **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.	

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.

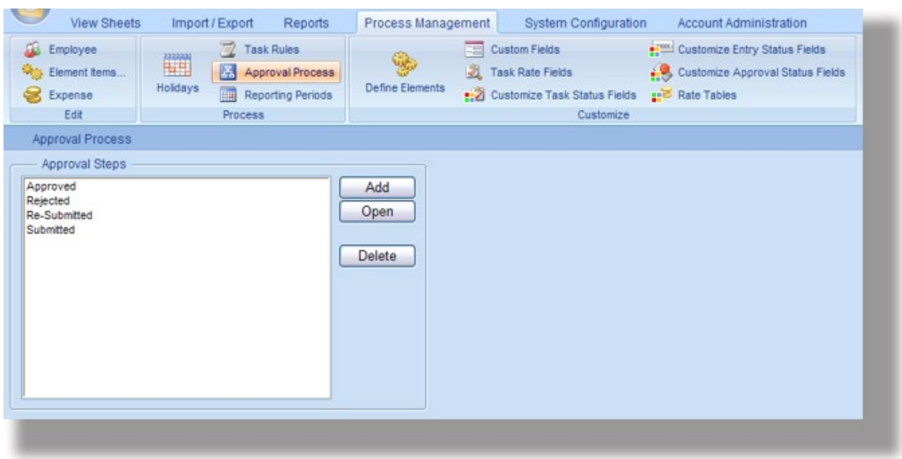
Office Timesheets allows you to:

- 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 **Add** button to add a new approval step to the workflow.	
The Open button	Select an approval step in the list box and click the **Open** button to view or make changes to the approval step.	
The Delete button	Select an approval step in the list box and click the **Delete** button to delete the approval step.	

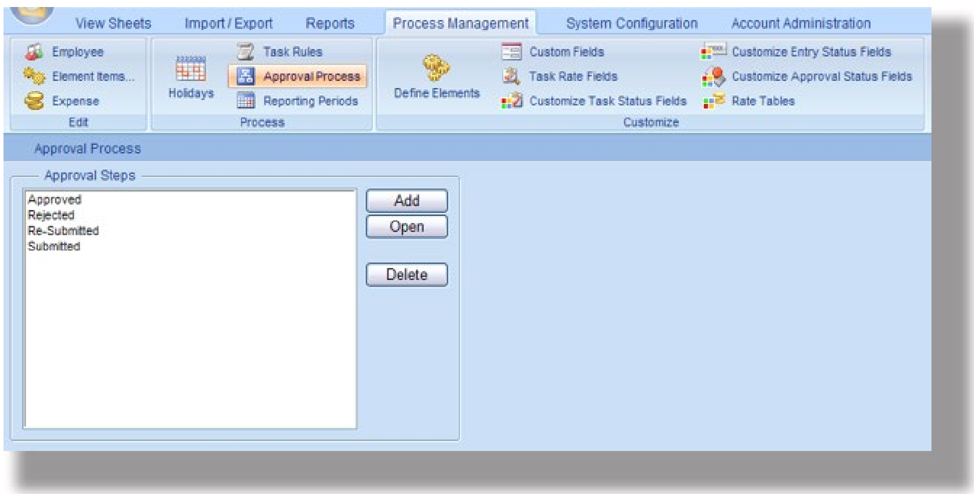
Adding an Approval Step Entry

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:

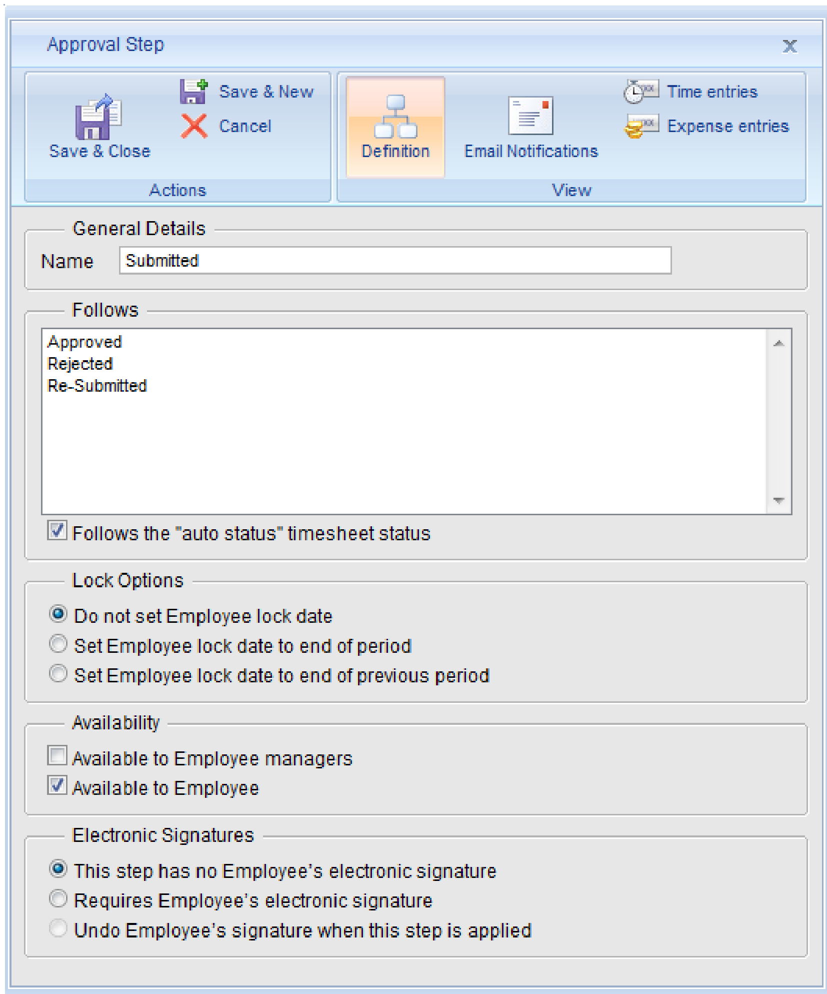
1. Click on **Approval Process** in the Process Management tab.

The Approval Process screen appears…



2. Click the **Add** button.

The Approval Step dialog box appears…



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...	To...
Do not set Employee lock date	Leave the Employee lock date as it is. Do not change the Employee lock date. **NOTE:** 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 **Employees and Employee Groups** 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:

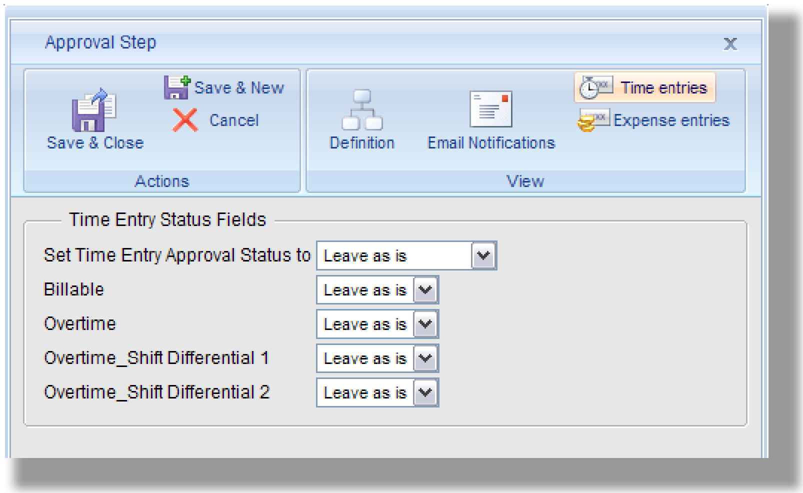
<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td>Employee Notifications panel</td><td>Use the contents of this panel to specify whether a notification has to be sent to the employee and to type the contents of the notification.</td><td></td></tr>
<tr><td>Notify Employee when step is applied</td><td>Check the Notify Employee when step is applied 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.</td><td></td></tr>
<tr><td>Token</td><td>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—
<table>
<tr><th>Token...</th><th>Appears on the screen as...</th><th>What happens to it when the message is sent...</th></tr>
<tr><td>Employee Name</td><td>[Employee Name]</td><td>Will get replaced with the employee’s name.</td></tr>
<tr><td>Manager Name</td><td>[Manager Name]</td><td>Will get replaced with the manager’s name.</td></tr>
<tr><td>Start Date</td><td>[Start Date]</td><td>Will get replaced with the starting date of the Reporting Period.</td></tr>
<tr><td>End Date</td><td>[End Date]</td><td>Will get replaced with the ending date of the Reporting Period.</td></tr>
<tr><td>Type</td><td>[Type]</td><td>Will get replaced with the type of sheet (i.e. Time or Expense).</td></tr>
</table>
NOTE: A 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 Timesheets sends the message, it replaces the token with the value of the token. For example, if you type “Dear ” and insert the Employee Name token, you will see “Dear [Employee Name]” on your screen. However, when this message is sent to an employee (say, Chris), in the message it will appear as “Dear Chris”.</td><td></td></tr>
<tr><td>Email Subject</td><td>Type the subject of the notification message.</td><td></td></tr>
</table>

<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td>The Add Subject Token button</td><td>Select a token from the Token drop-down list and click the Add Subject Token button, to add the selected token to the Email Subject at the current cursor location.</td><td></td></tr>
<tr><td>The Email body text box</td><td>Type the text of the notification message.</td><td></td></tr>
<tr><td>The Add Message Token button</td><td>While typing the body matter of the notification message, select a token from the Token drop-down list and click the Add Message Token button, to add the selected token to the body of the message at the current cursor location.</td><td></td></tr>
<tr><td>Group Manager Notifications panel</td><td>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.</td><td></td></tr>
<tr><td>Notify group manager(s) when step is applied</td><td>Check the Notify group manager(s) when step is applied 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.</td><td></td></tr>
<tr><td>Token</td><td>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—
<table>
<tr><th>Token…</th><th>Appears on the screen as…</th><th>What happens to it when the message is sent…</th></tr>
<tr><td>Employee Name</td><td>[Employee Name]</td><td>Will get replaced with the employee’s name.</td></tr>
<tr><td>Manager Name</td><td>[Manager Name]</td><td>Will get replaced with the manager’s name.</td></tr>
<tr><td>Start Date</td><td>[Start Date]</td><td>Will get replaced with the starting date of the Reporting Period.</td></tr>
<tr><td>End Date</td><td>[End Date]</td><td>Will get replaced with the ending date of the Reporting Period.</td></tr>
<tr><td>Type</td><td>[Type]</td><td>Will get replaced with the type of sheet (i.e. Time or Expense).</td></tr>
</table></td><td></td></tr>
</table>

Item	How to use the Item	Default Value (if any)
	NOTE: A **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 Timesheets** 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 **Token** drop-down list and click the **Add Subject Token** button, to add the selected token to the **Email Subject** 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 **Token** drop-down list and click the **Add Message Token** 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.



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

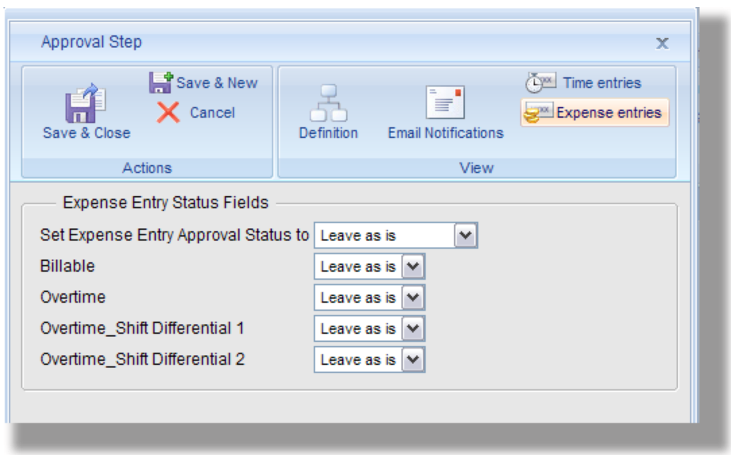
The following table describes the various items in the Time entries panel:

Item	How to use the Item	Default Value (if any)
Set Time Entry Approval Status to	Specify whether the **Time Entry Approval Status** field should be changed, or left as is, when this approval step is applied. The **Set Time Entry Approval Status to** drop-down list contains the approval statuses that have been defined in the **Customize Approval Status Fields** screen. **NOTE:** If you don't want the **Time Entry Approval Status** field to be changed, select "Leave as is" from the drop-down list. The rest of the items in the **Time entries** panel are the names of the user defined **Entry Status Fields** that you defined in the **Customize Entry Status Fields** screen. For each of these items, you can specify whether the status field in the **Time Entry** 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— **Value...** — **Select this value to...** Leave as is — Leave 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 — Uncheck the value of the entry status field. **NOTE:** If you don't want the **Time Entry Status** field to be changed, select "Leave as is" from the drop-down list.	

Setting Expense Entry Status Fields

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 **Expense Entry Approval Status** field should be changed, or left as is, when this approval step is applied. The **Set Expense Entry Approval Status to** drop-down list contains the approval statuses that have been defined in the **Customize Approval Status Fields** screen. **NOTE:** If you don't want the **Expense Entry**	

Item	How to use the Item	Default Value (if any)
	Approval Status field to be changed, select "Leave as is" from the drop-down list. The rest of the items in the **Expense entries** panel are the names of the user defined **Entry Status Fields** that you defined in the **Customize Entry Status Fields** screen. For each of these items, you can specify whether the status field in the **Expense Entry** 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— **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:** If you don't want the **Expense Entry Status** field to be changed, select "Leave as is" from the 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:

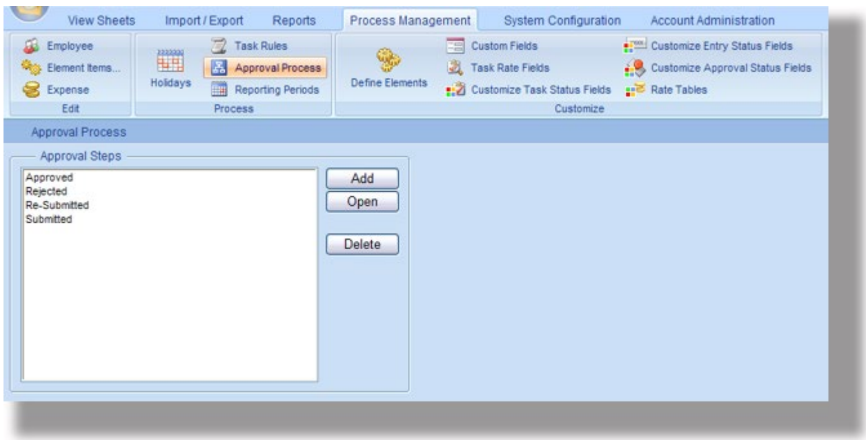
Do this...	To...
Click the **Save & New** button	Save this Approval Step entry and start creating a new Approval Step entry.
Click the **Save & Close** button	Save this Approval Step entry and return to the **Approval Process** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Approval Step** dialog box	Return to the **Approval Process** 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…



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:

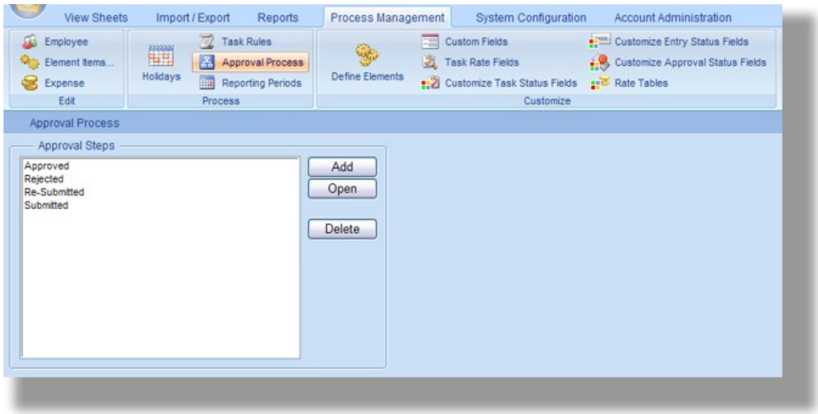
Do this...	To...
Click the **Save & New** button	Save the changes you have made to the Approval Step entry and start creating a new Approval Step entry.
Click the **Save & Close** button	Save the changes you have made to the Approval Step entry and return to the **Approval Process** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Approval Step** dialog box	Return to the **Approval Process** 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…

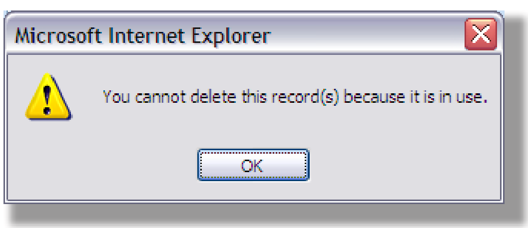


2. Select an Approval Step from the list box and click the **Delete** button.

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

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:

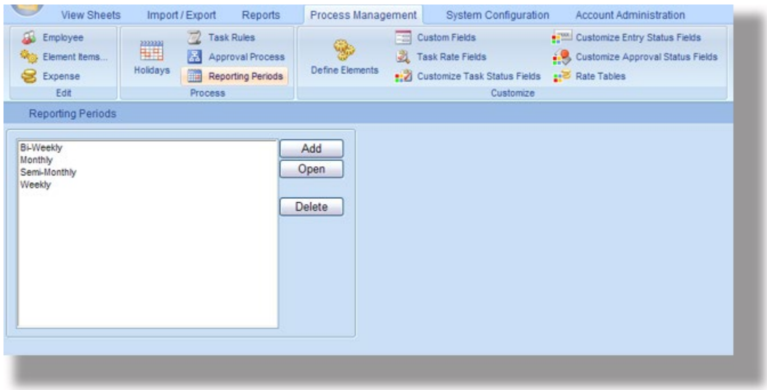


To delete such an entry, you will first have to stop using the Approval Step. (See Viewing or Making Changes to an Approval Step entry for more details.)

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.



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

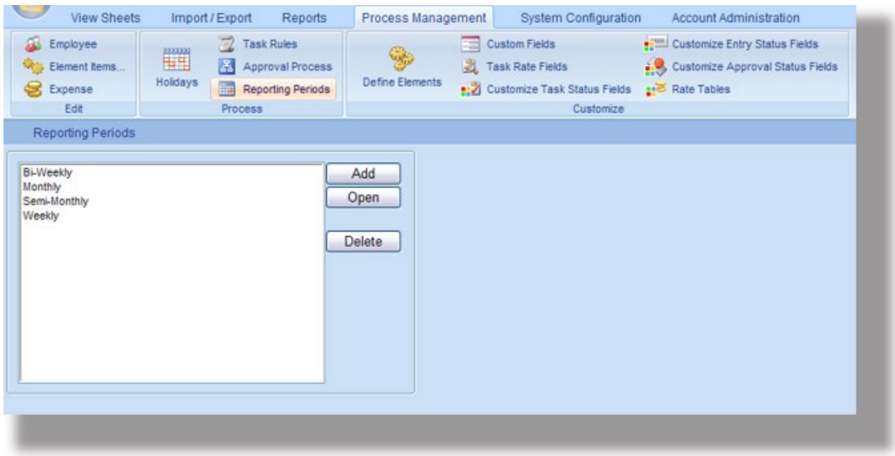
Item	How to use the Item	Default Value (if any)
The Reporting Periods panel	The list box in this panel contains a list of all the reporting periods defined so far (in alphabetical order).	
The Add button	Click the **Add** button to define a new reporting period.	
The Open button	Select a reporting period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

Adding a Reporting Period

To add a Reporting Period:

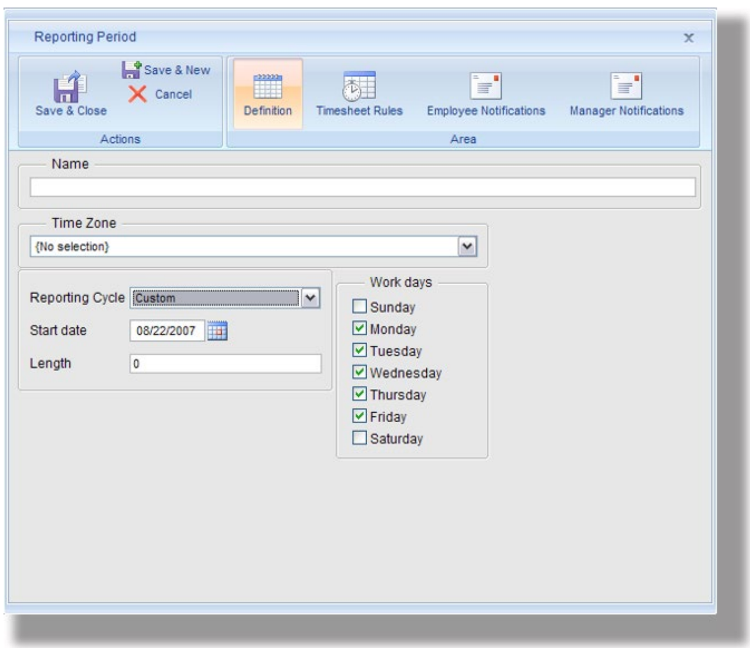
1. Click on the **Reporting Periods** icon in the Process Management tab.

The Reporting Period screen appears...



2. Click the **Add** button.

The Reporting Period dialog box appears...



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:

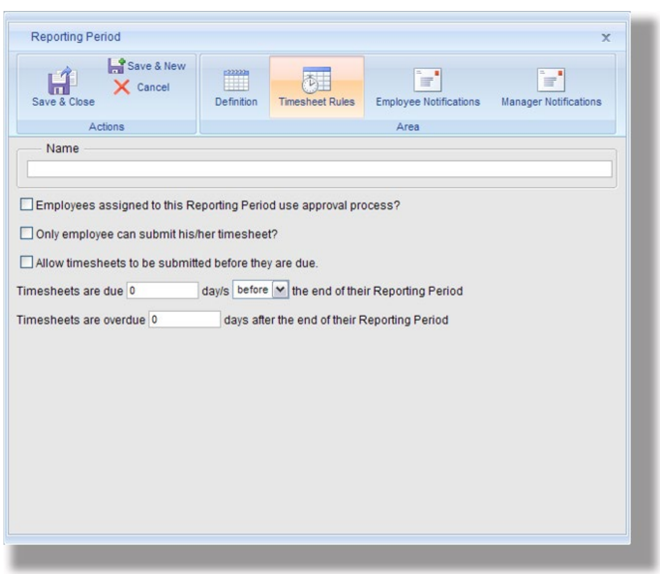
If you select...	You will have to also...
Weekly	Select the starting day of the week from the **Start day** drop-down list.
User-defined Semi-Monthly	Specify the **Split Day**. The Split Day is typically for Semi_Monthly reporting periods where there are two (2) reporting periods in a month. The Split 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 **Start date** using the Date Picker.
Custom	Select the **Start date** using the Date Picker and also specify the **Length** (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

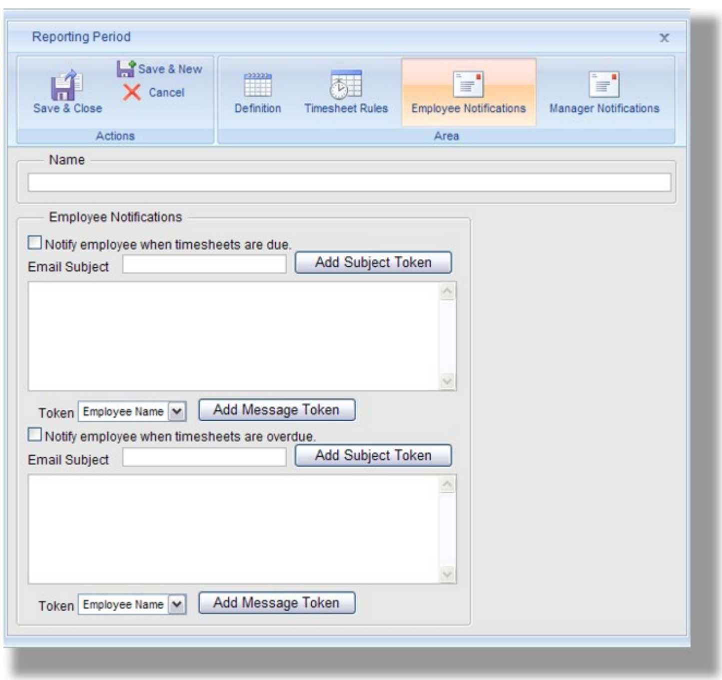
Uncheck the *Allow timesheets to be submitted before they are due?* check box if you do not want employees to submit their timesheets before they are due.

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…



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:

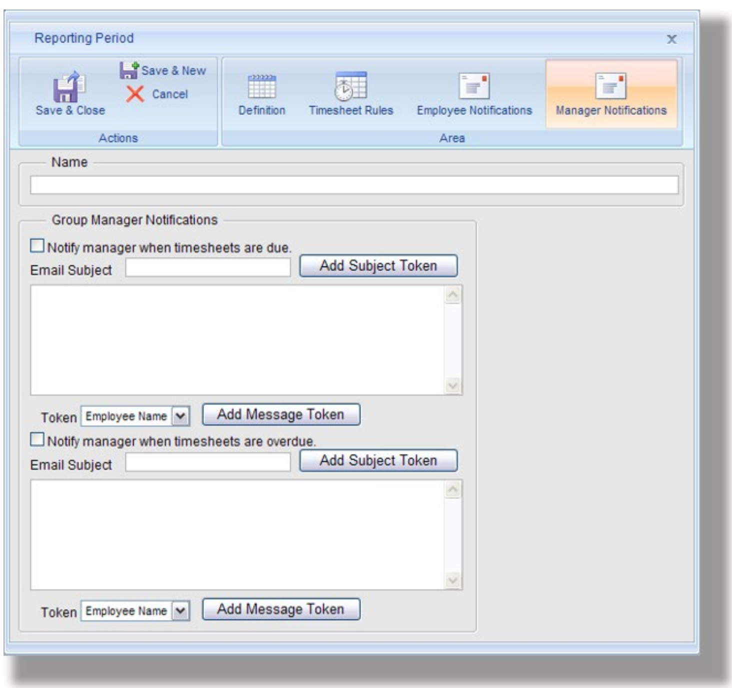
<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td>Notify Employee when timesheets are due</td><td>Check the Notify Employee when timesheets are due check box if you want a notification to be sent to the employee when timesheets are due from the employee.</td><td></td></tr>
<tr><td>Token</td><td>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:
<table>
<tr><th>Token...</th><th>Appears on the screen as...</th><th>What happens to it when the message is sent...</th></tr>
<tr><td>Employee Name</td><td>[Employee Name]</td><td>Will get replaced with the employee’s name.</td></tr>
<tr><td>Manager Name</td><td>[Manager Name]</td><td>Will get replaced with the manager’s name.</td></tr>
<tr><td>Start Date</td><td>[Start Date]</td><td>Will get replaced with the starting date of the Reporting Period.</td></tr>
<tr><td>End Date</td><td>[End Date]</td><td>Will get replaced with the ending date of the Reporting Period.</td></tr>
</table>
NOTE: A 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 Timesheets sends the message, it replaces the token with the value of the token. For example, if you type “Dear ” and insert the Employee Name token, you will see “Dear [Employee Name]” on your screen. However, when this message is sent to an employee (say, Chris), in the message it will appear as “Dear Chris”.</td><td></td></tr>
<tr><td>Email Subject</td><td>Type the subject of the notification message.</td><td></td></tr>
<tr><td>The Add Subject Token button</td><td>Select a token from the Token drop-down list and click the Add Subject Token button, to add the selected token to the Email Subject at the current cursor location.</td><td></td></tr>
<tr><td>The Email body text box</td><td>Type the text of the notification message.</td><td></td></tr>
</table>

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 **Token** drop-down list and click the **Add Message Token** 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 **Notify Employee when timesheets are overdue** 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…



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 **Notify manager when timesheets are due** 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— **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. End Date / [End Date] / Will get replaced with the ending date of the Reporting Period. **NOTE:** A **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 Timesheets** sends the message, it replaces the token with the value of the token. For example, if you type "Dear " and insert the Employee Name token, you will see "Dear [Employee Name]" on your screen. However, when this message is sent to an employee (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 **Token** drop-down list and click the **Add Subject Token** button, to add the selected token to the **Email Subject** 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 **Token** drop-down list and click the **Add Message Token** 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 **Notify manager when timesheets are overdue** 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:

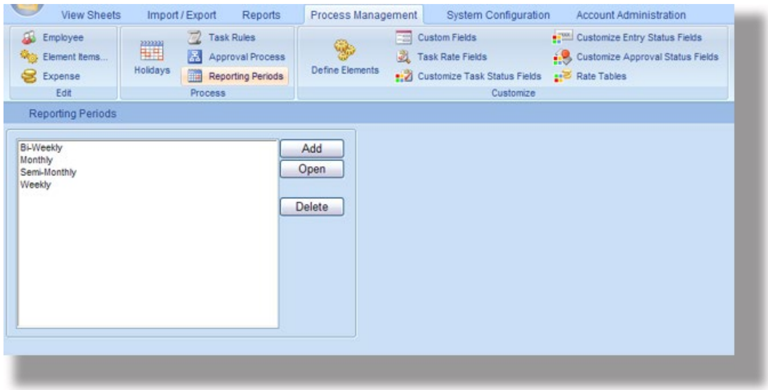
Do this...	To...
Click the **Save & New** button	Save this Reporting Period entry and start creating a new Reporting Period entry.
Click the **Save & Close** button	Save this Reporting Period entry and return to the **Reporting Periods** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Reporting Period** dialog box	Return to the **Reporting Periods** 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…



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…

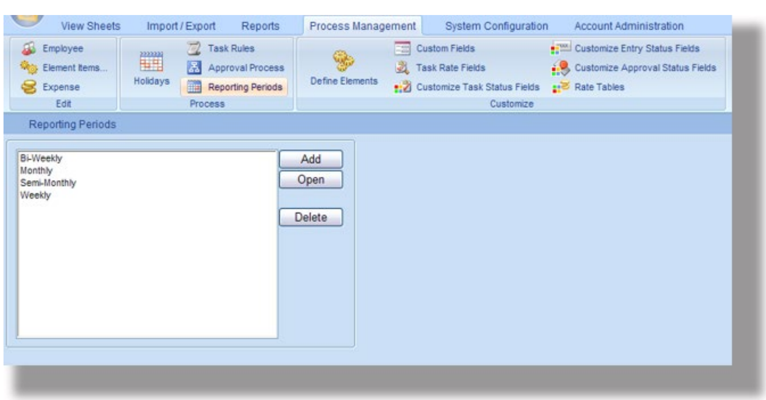
Do this…	To…
Click the **Save & New** button	Save the changes you have made to the Reporting Period entry and start creating a new Reporting Periods entry.
Click the **Save & Close** button	Save the changes you have made to the Reporting Period entry and return to the **Reporting Periods** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Reporting Period** dialog box	Return to the **Reporting Periods** 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…

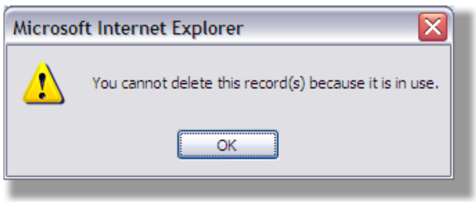


2. Select a Reporting Period from the list box and click the **Delete** button.

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:



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.

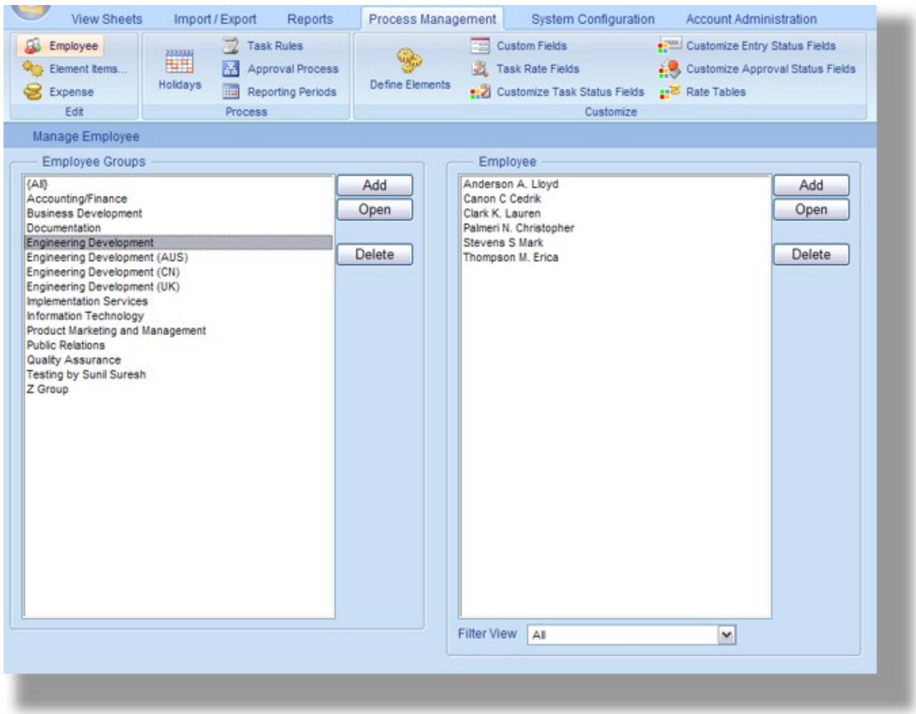
A user is an employee who has been assigned a User Account. You must assign a User Account to each employee that will access the Office Timesheets application. The total number of user accounts allowed by Office Timesheets License Activation Manager will depend on how many User Account licenses have 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.



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 **Add** button to add a new Employee entry.	
The Open button	Select an Employee entry in the list box and click the **Open** button to view or make changes to the Employee entry.	
The Delete button	Select an Employee entry in the list box and click the **Delete** button to delete the Employee entry.	
Filter View	Select whether to view only active entries, inactive entries or all entries. **TIP:** 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 **Filter View** drop-	All

Item	How to use the Item	Default Value (if any)
	down list. When you do this, **Office Timesheets** 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 **Add** button to add a new Employee Group.	
The Open button	Select an Employee Group entry in the list box and click the **Open** 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 **Delete** button to delete the Employee Group entry.	

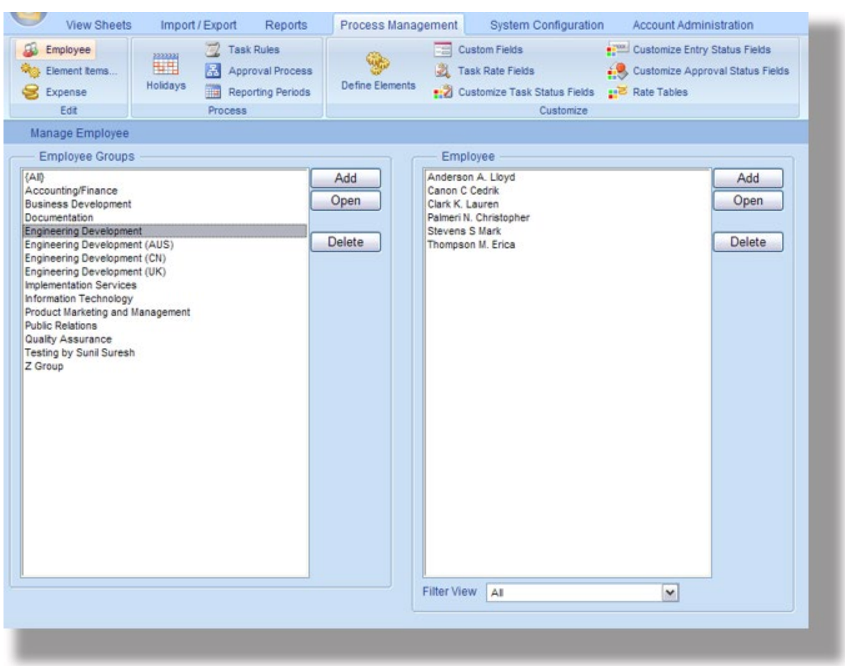
Adding an Employee Entry

Note: Only systems administrators can add Employee entries.

To add an Employee entry:

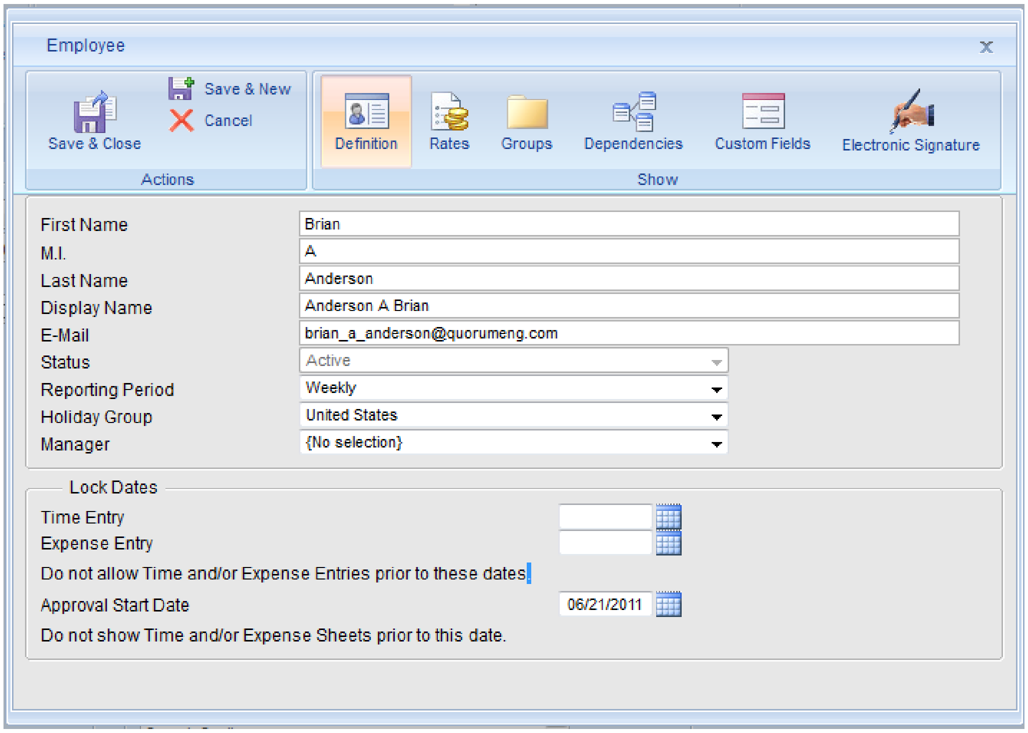
1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen will appear…



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

The Employee dialog box will appear…



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:

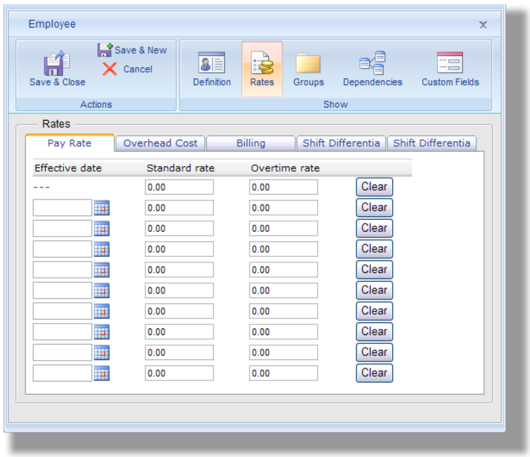
Item	How to use the Item	Default Value (if any)
First Name	In the **First Name** field, type the first name of the employee. Eg: Paul	
M.I.	In the **M.I.** field, type the middle initials of the employee. Eg: J. **Note:** You can enter a maximum of five (5) characters in the **M.I.** field.	
Last Name	In the **Last Name** field, type the last name of the employee. Eg: Ford	
Display Name	The **Display Name** 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)
	Note: By default, the **Display Name** field will automatically display the last name, middle initial and first name that you have typed in the **Last Name**, **M.I.** and **First Name** 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 **Display Name** of the second entry to "Ford Johnson Paul".)	**Last Name**, **M.I.** and **First Name** fields, respectively.
E-Mail	In the **E-Mail** field, type the e-mail address of the employee.	
Status	From the **Status** drop-down list, select whether the employee entry is "active" or "inactive". **TIP:** 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 **Reporting Period** drop-down list, select the Reporting Period for the employee. Employees have to submit their Timesheets at the end of each Reporting Period. **NOTE:** The **Reporting Period** drop-down list contains the Reporting Periods that you have defined in the Reporting Periods screen. **TIP:** Select "{No selection}" if you do not want to assign any Reporting Period for the employee.	{No selection}
Holiday Group	From the **Holiday Group** 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 **Holidays and Holiday Groups** for	{No selection}

Item	How to use the Item	Default Value (if any)
	more information.) **NOTE:** The **Holiday Group** drop-down list contains the names of the Holiday Groups that you have defined using the **Holiday** screen. **TIP:** Select "{No selection}" if you do not want to assign any Holiday Group to the employee.	
Lock Dates	In the **Lock Dates** 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 **Time Entry** field, using the Date Picker, select the starting date for time entries. **NOTE:** 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 **Expense Entry** field, using the Date Picker, select the starting date for expense entries. **NOTE:** 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.



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:

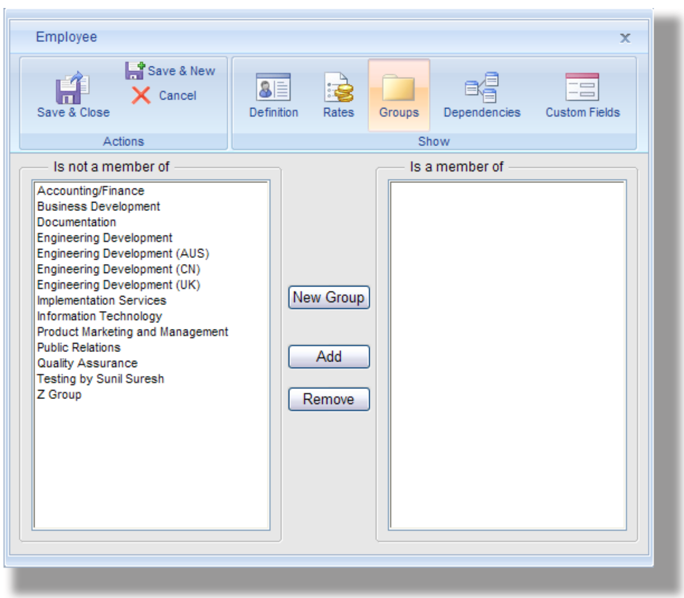
On...	**Make the following entry...**
On 1-Jan-2007, an employee joins is paid at a standard rate of $4.	When you create the Employee entry, you would type 4.00 in the **Standard rate** column of the first row.
On 1-Jul-2007, the employee is given an increment and his pay rate rises to $6.	Edit the Employee's 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.

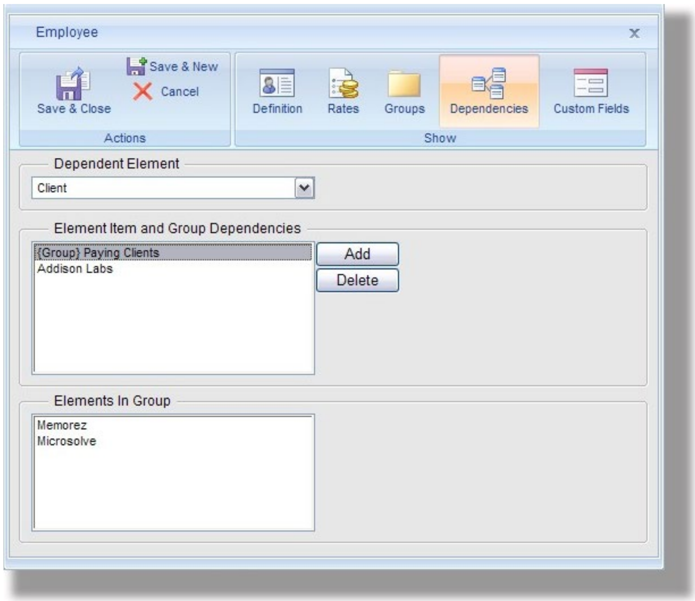
The following table describes the various items in the Groups panel:

Item	How to use the Item	Default Value (if any)
Is not a member of	The **Is not a member of** panel displays the Employee Groups (if any) that have not been assigned to the employee.	
Is a member of	The **Is a member of** 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 **New Group** button to create a new employee group and make the employee a member of that group. (See **Creating Employee Groups** for more details about creating a new Employee Group.)	
The Add button	Select one or more group names from the **Is not a member of** panel and click the **Add** button to add the Employee to those groups. When you click the **Add** button, the group names that you have selected will shift to the **Is a member of** panel, indicating that the employee is now a member of those groups.	
The Remove button	Select one or more group names from the **Is a member of** panel and click the **Remove** button to remove the Employee from those groups. When you click the **Remove** button, the group names that you have selected will shift to the **Is not a member of** 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.



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

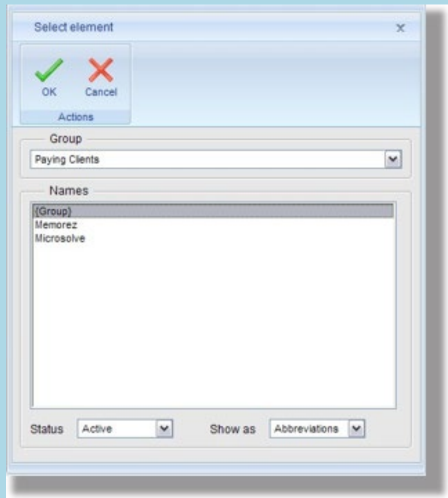
NOTE: You have to specify the dependent element items and groups only if you have previously defined certain elements to be dependent upon the Employee item in the Task Rules screen. (See Defining Task Rules and Dependencies for more information on specifying Task Rules and setting the order of the entries.)

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 **Task Rules** screen will appear in the **Dependent Element** drop-down list. Select each item in turn and use the **Add** 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 **Element Item and Group Dependencies** panel displays all the dependent element items and groups that you have set up for the employee. Use the **Add** and **Delete** buttons to add entries to, or delete entries from, this panel.	

<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td>The Add button</td><td>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.



To add a group to the Element Item and Group Dependencies panel:

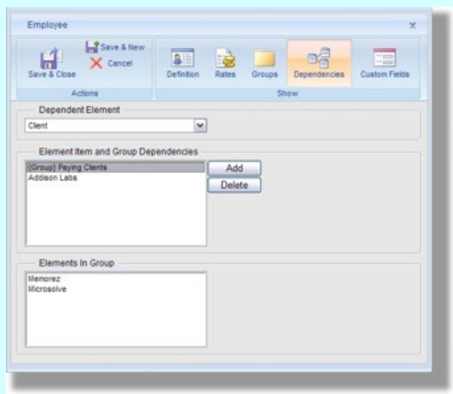
1. Select the group name from the Group drop-down list. The names of the items that belong to the selected group will appear in the Names panel.
2. To select a name, click on the name.

OR

To select the entire group, click on {Group} in the Names panel.

3. Click OK.

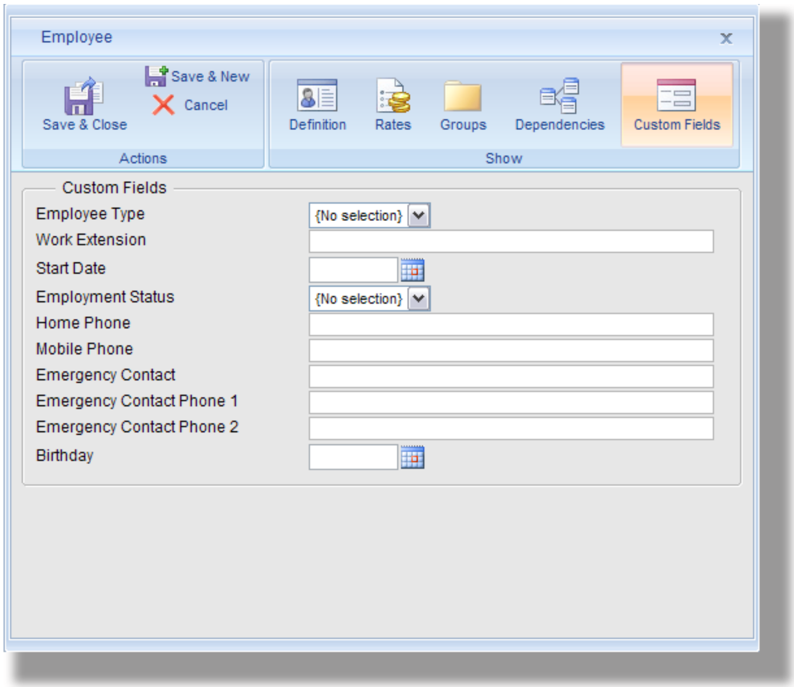
The selected name or group will be added to the Element Item and Group Dependencies panel.</td><td></td></tr>
<tr><td>The Delete button</td><td>To remove an item from the Element Item and Group Dependencies panel, select the item and click the Delete button. Office Timesheets will ask whether you really want to delete the entry.</td><td></td></tr>
</table>

Item	How to use the Item	Default Value (if any)
	 Click **OK** to delete the selected entry.	
Elements in Group	When you click on a Group item in the **Element Item and Group Dependencies** panel, the members of that group will be displayed in the **Elements in Group** panel.  **NOTE:** Though you may define the dependent items & groups here, they will only be enforced if you have checked the **Use level dependency rules** check box in the **Task Rules** screen.	

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.



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...	To...
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 **Manage Employee** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Employee** dialog box	Return to the **Manage Employee** screen without saving the new Employee entry.

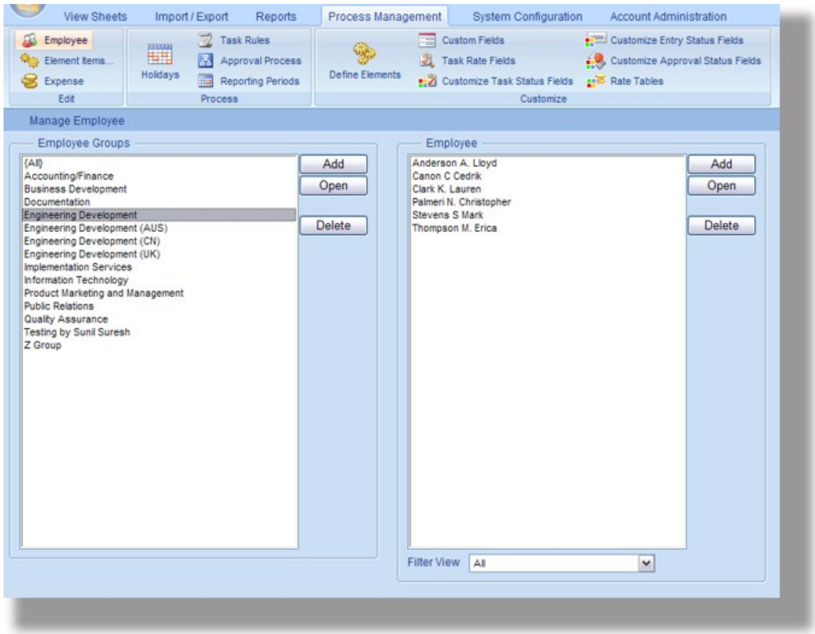
Viewing or Making Changes to an Employee Entry

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…



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…	To…
Click the **Save & New** 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 **Manage Employee** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Employee** dialog box	Return to the **Manage Employee** 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.

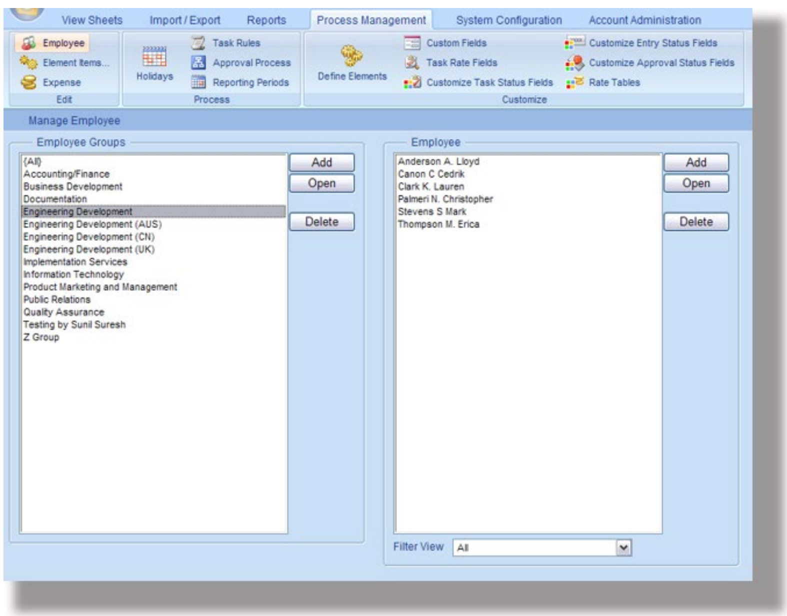
3. Select the specified employee you wish to remove from the User Accounts list and click the **Delete** button. (Note: You are not deleting the employee record here. You are only removing the employee's ability to log into Office Timesheets…a.k.a. their "User Account". This also frees up the license 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…



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.

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

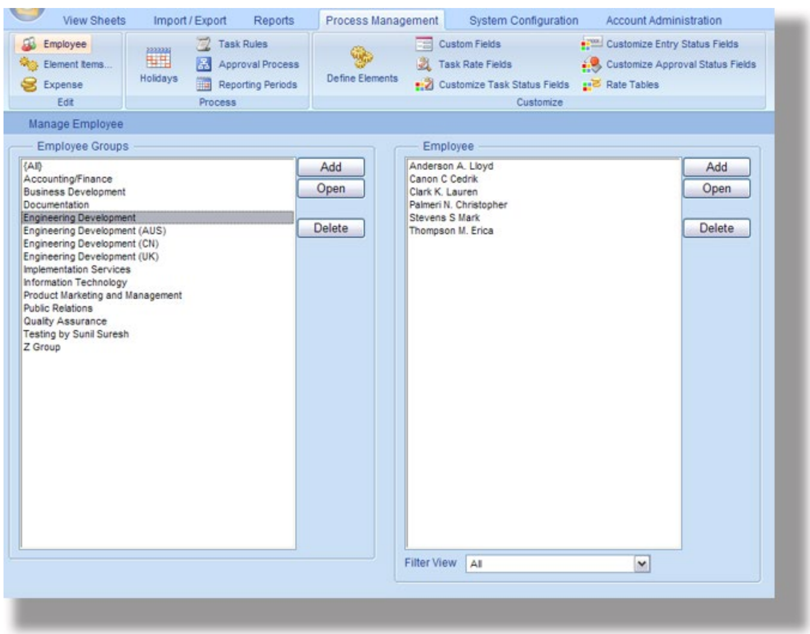
If there are many employees in your organization, you can create groups and assign employees to these groups for easy management of the employees' data and entries. For example, you could create groups for—

- 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:

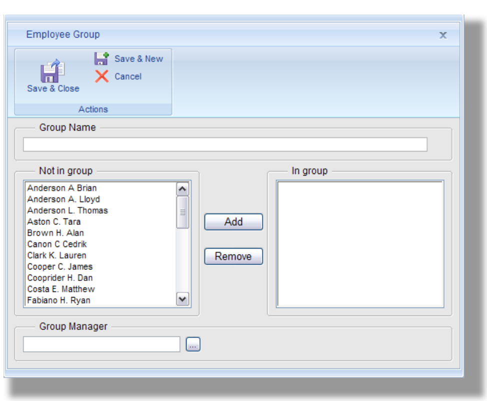
1. Click on the **Employee** icon in the Process Management tab.

The Manage Employee screen will appear…



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

The Employee Group dialog box will appear…



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 **Not in group** panel displays the names of employees who have not been assigned to the group.	
In group	The **In group** panel displays the names of employees who have already been assigned to the group. **NOTE:** If you are creating a new entry, the **In group** panel will be empty until you add members to the group.	
The Add button	Select one or more employee names from the **Not in group** panel and click the **Add** button to add the employees to the group. When you click the **Add** button, the employee names that you have selected will shift to the **In group** panel, indicating that the employees are now members of the group.	
The Remove button	Select one or more employee names from the **In group** panel and click the **Remove** button to remove the employees from the group. When you click the **Remove** button, the employee names that you have selected will shift to the **Not in group** panel, indicating that the employees are no longer members of the group.	
Group Manager	If you want to assign a manager for the group, click the ... button in the **Group Manager** panel and select an employee as a manager. **NOTE:** 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. **TIP:** 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...	To...
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 **Manage Employee** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Employee Group** dialog box	Return to the **Manage Employee** 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.

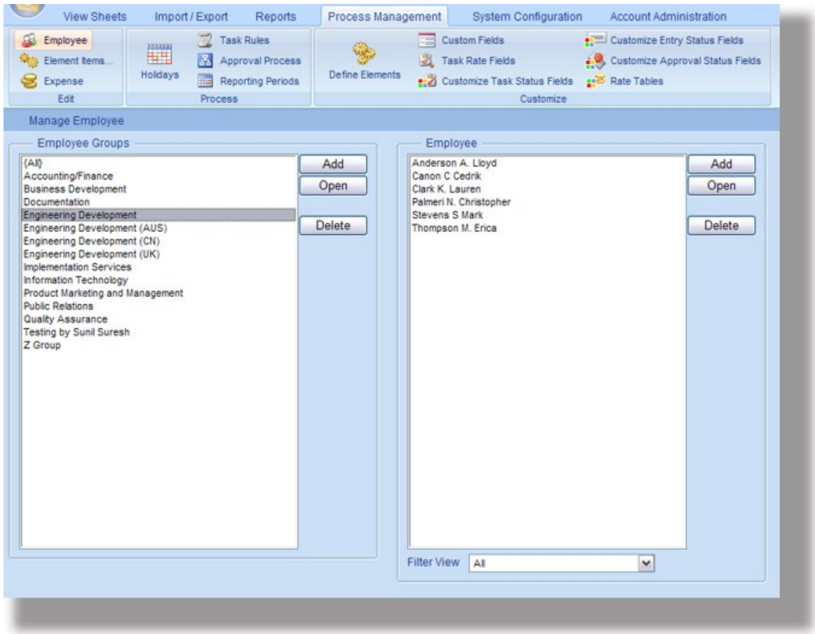
TIP: If you click on {All} in the Employee Groups panel, Office Timesheets will display the names of all the employees.

Viewing or Making Changes to an Employee Group Entry

To view or make changes to an Employee Group entry:

1. Click on the E**mployee** icon in the Process Management tab.

The Manage Employee screen appears…



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...

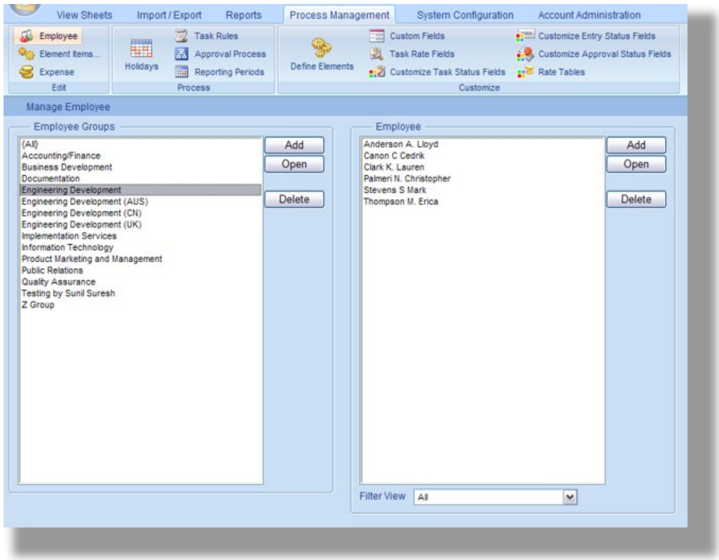
Do this...	To...
Click the **Save & New** button	Save the changes you have made to the Employee Group entry and start creating a new Employee Group entry.
Click the **Save & Close** button	Save the changes you have made to the Employee Group entry and return to the **Manage Employee** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Employee Group** dialog box	Return to the **Manage Employee** 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...



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

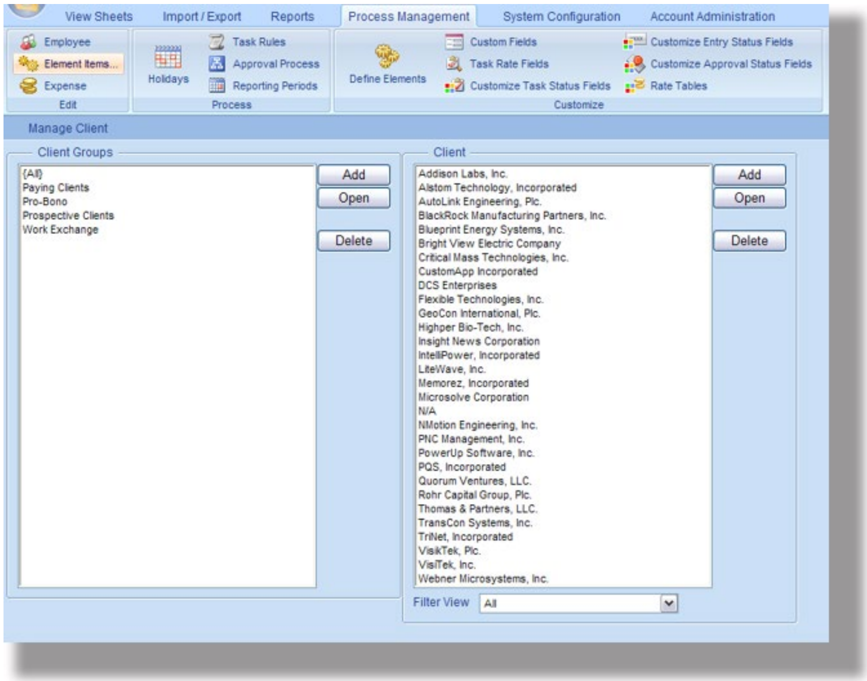
Task elements create the primary structure of tasks within Office Timesheets. Office Timesheets allows you to define up to ten element items.

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}".



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 **{Element}** panel is displayed on the right-half of the **Manage {Element}** 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 **Add** button to add a new {Element} entry.	
The Open button	Select an {Element} entry in the list box and click the **Open** button to view or make changes to the {Element} entry.	
The Delete button	Select an {Element} entry in the list box and click the **Delete** 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 **{Element} Groups** panel is displayed on the left-half of the **Manage {Element}** screen. This panel displays the list of **{Element} Groups** that have been defined till now. It also has buttons to add, view/edit and delete {Element} Groups.	
The Add button	Click the **Add** button to add a new {Element} Group.	
The Open button	Select an {Element} Group entry in the list box and click the **Open** 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 **Delete** button to delete the {Element} Group entry.	

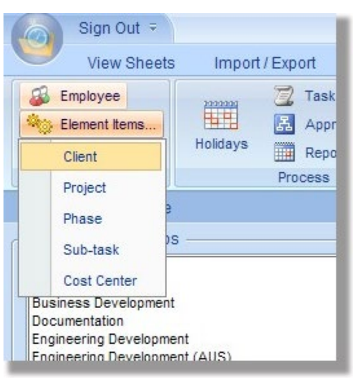
Adding an Element Item Entry

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.

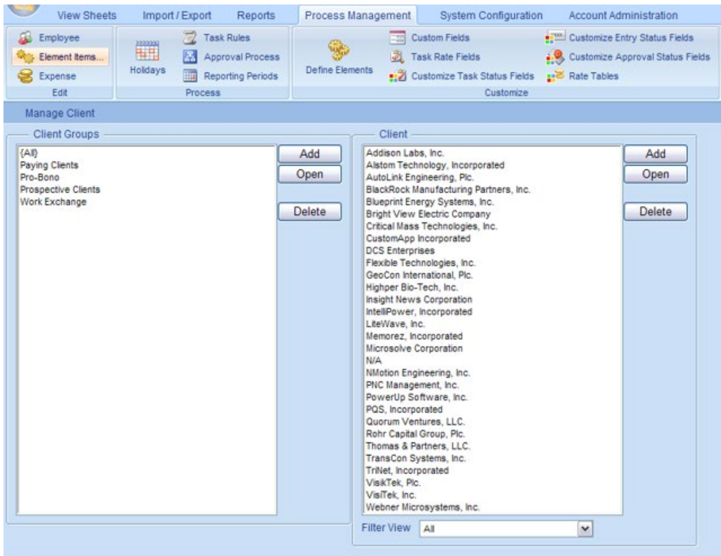
A drop-down menu appears that contains the elements that you have previously defined.



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.

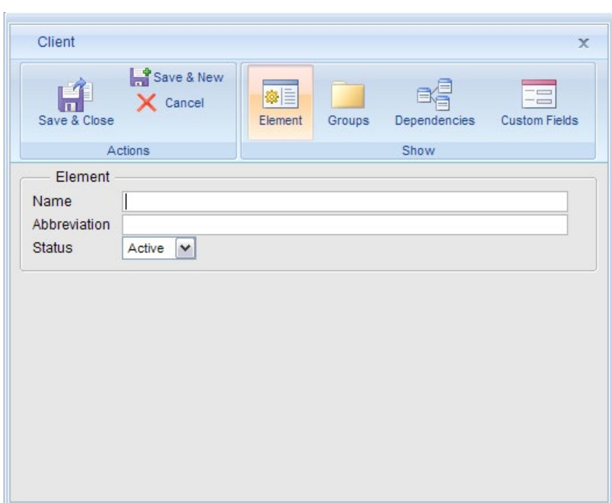
NOTE: Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen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



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…



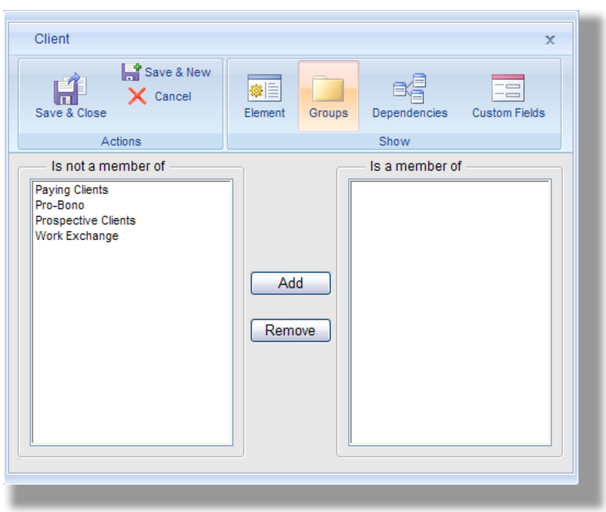
4. In the Element panel, type a name and an abbreviated name for the {Element}. Also, select the status of the item—Active or Inactive.

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

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 **Status** drop-down list, select the status of the entry—whether it is "Active" or "Inactive".	Active

Assigning the Element Item to one or more Groups

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



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

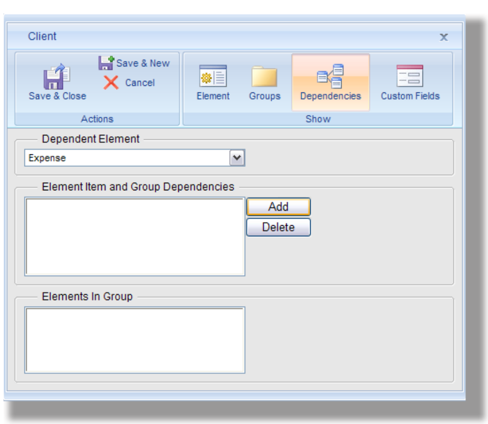
The following table describes the various items in the Groups panel:

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

Item	How to use the Item	Default Value (if any)
Is not a member of	The **Is not a member of** panel displays the {Element} Groups (if any) that have not been assigned to the {Element}.	
Is a member of	The **Is a member of** panel displays the {Element} Groups (if any) that have been assigned to the {Element}. **Note:** If you are creating a new {Element} entry, the **Is a member of** panel will be empty until you assign the {Element} to a group.	
The Add button	Select one or more group names from the **Is not a member of** panel and click the **Add** button to add the {Element} to those groups. When you click the **Add** button, the group names that you have selected will shift to the **Is a member of** panel, indicating that the {Element} is now a member of those groups.	
The Remove button	Select one or more group names from the **Is a member of** panel and click the **Remove** button to remove the {Element} from those groups. When you click the **Remove** button, the group names that you have selected will shift to the **Is not a member of** 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.



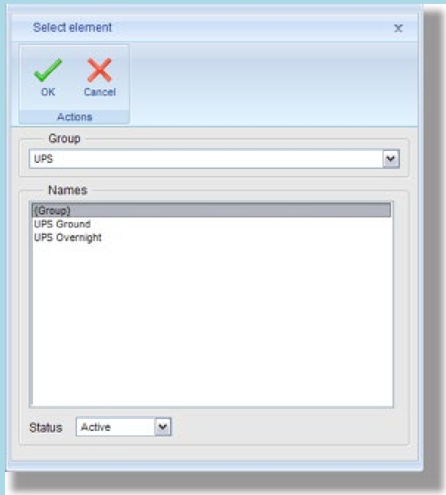
Use the Dependencies panel to define the dependent element items and groups that can be used by an employee while making the task entries.

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:

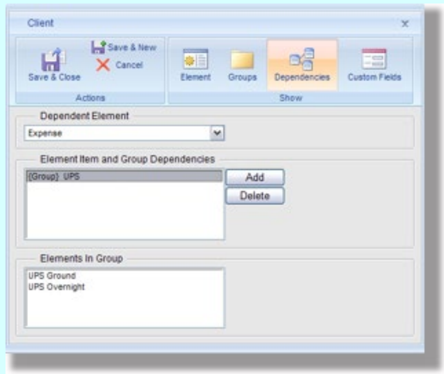
NOTE: These items will appear in the Dependencies panel only if you have previously defined certain elements to be dependent upon the {Element} item in the Task Rules screen.

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

Item	How to use the Item	Default Value (if any)
	 To add a group to the **Element Item and Group Dependencies** panel: 1. Select the group name from the **Group** drop-down list. The names of the items that belong to the selected group will appear in the **Names** panel. 2. To select a name, click on the name. OR To select the entire group, click on **{Group}** in the **Names** panel. 3. Click **OK**. The selected name or group will be added to the **Element Item and Group Dependencies** panel.	
The Delete button	To remove an item from the **Element Item and Group Dependencies** panel, select the item and click the **Delete** button. **Office Timesheets** will ask whether you really want to delete the entry.  Click **OK** to delete the selected entry.	

<table>
<tr><th>Item</th><th>How to use the Item</th><th>Default Value (if any)</th></tr>
<tr><td>Elements in Group</td><td>

When you click on a Group item in the **Element Item and Group Dependencies** panel, the members of that group will be displayed in the **Elements in Group** panel.

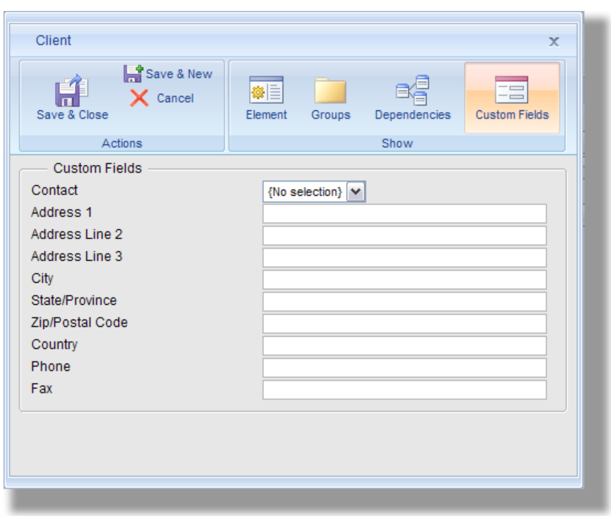


NOTE: Though you may define the dependent items & groups here, they will only be enforced if you have checked the **Use level dependency rules** check box in the **Task Rules** screen.

</td><td></td></tr>
</table>

Entering Other Details About the Element Item

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



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…	To…
Click the **Save & New** 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 **Manage {Element}** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **{Element}** dialog box	Return to the **Manage {Element}** screen without saving the new {Element} entry.

Viewing or Making Changes to an Element Item Entry

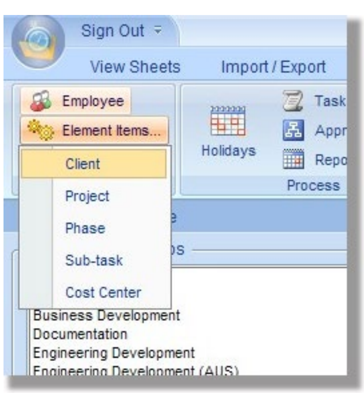
NOTE: Only systems administrators can make changes to Element Item entries.

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.

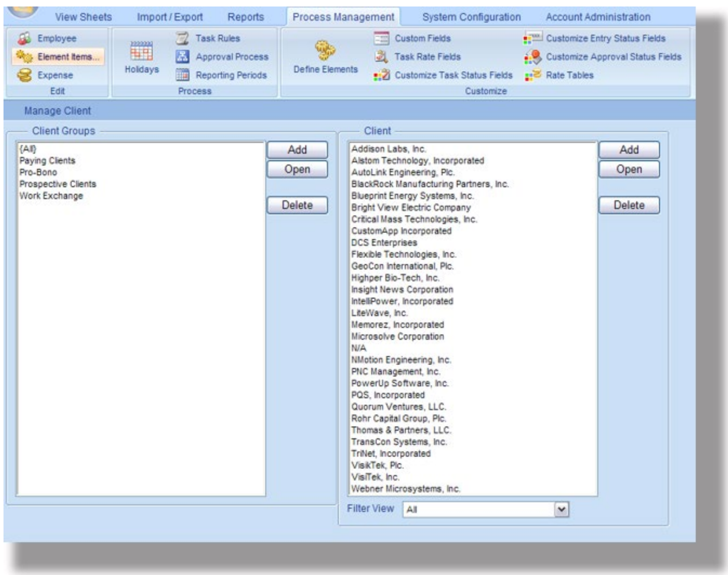
A drop-down menu appears that contains the elements that you have previously defined…



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...	To...
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 **Manage {Element}** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **{Element}** dialog	Return to the **Manage {Element}** screen without saving the changes that you have made to the {Element} entry.

Do this...	To...
box	

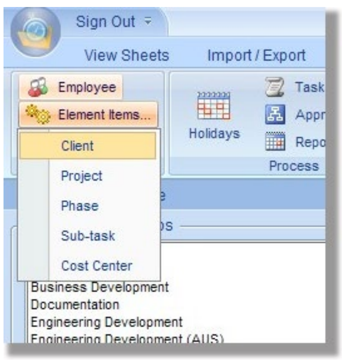
Deleting an Element Item Entry

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.

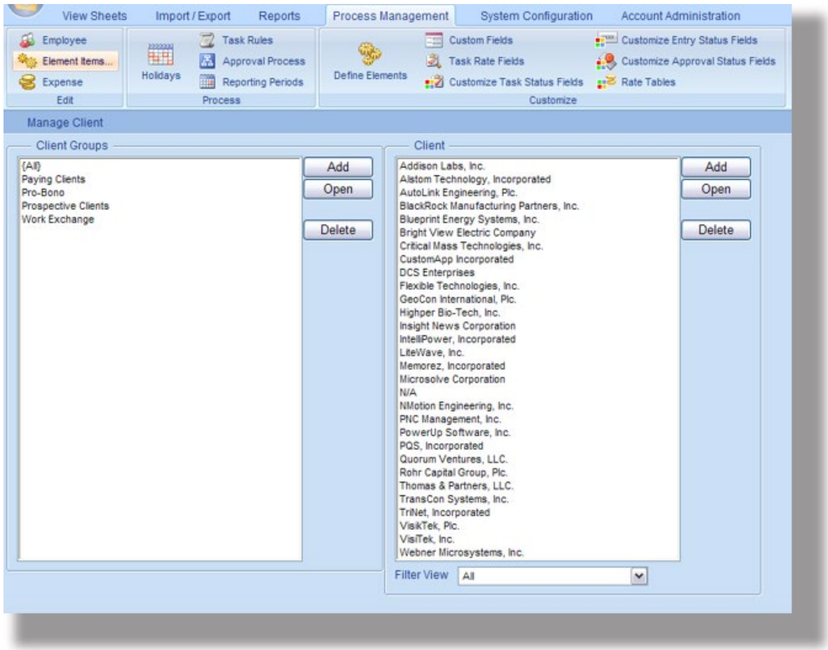
A drop-down menu appears that contains the elements that you have previously defined.



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.

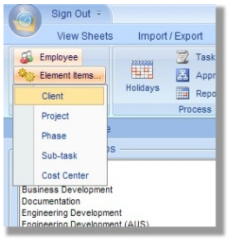
Creating an Element Item Group Entry

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.

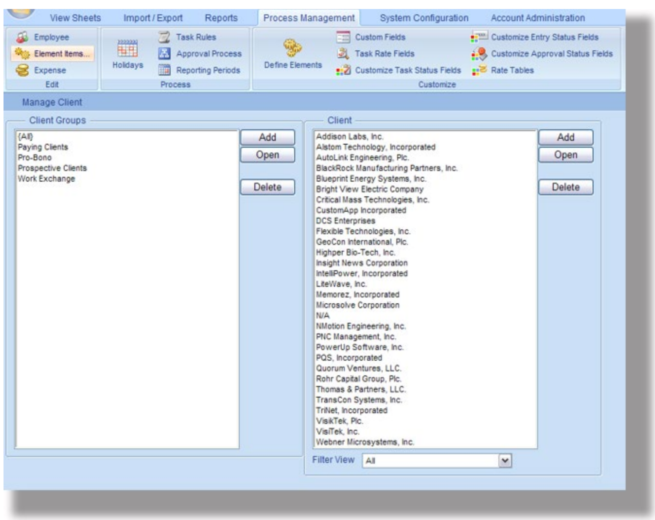
A drop-down menu appears that contains the elements that you have previously defined…



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.

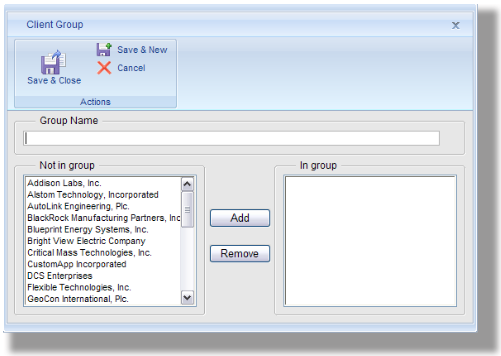
NOTE: Since the element items are user-defined, each organization may have its own element items. Therefore, in these pages, we have referred to the element item as "{Element}". Replace this with the name of the element that you click on. For example, if you click on "Client", the Manage Client screen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



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 **Not in group** panel displays the names of {Elements} which have not been assigned to the group.	
In group	The **In group** panel displays the names of {Elements} which have already been assigned to the group. **NOTE:** If you are creating a new entry, the **In group** 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 **In group** panel and click the **Remove** button to remove the {Elements} from the group. When you click the **Remove** button, the {Element} names that you have selected will shift to the **Not in group** 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...	To...
Click the **Save & New** 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 **Manage {Element}** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **{Element} Group** dialog box	Return to the **Manage {Element}** 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}".

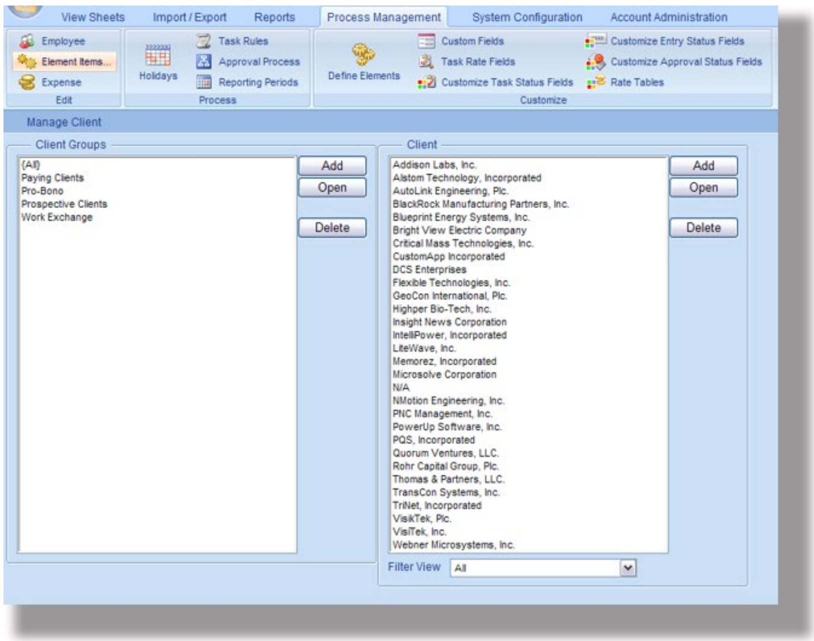
1. Click on **Element Items…** in the Process Management tab.

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.



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...	To...
Click the **Save & New** 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 **Manage {Element}** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **{Element} Group** dialog box	Return to the **Manage {Element}** screen without saving the changes that you have made to the {Element} Group entry.

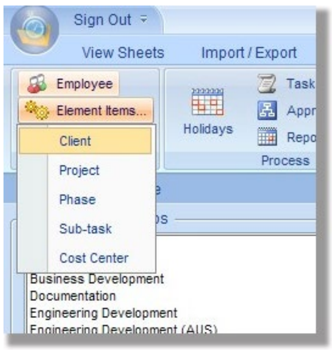
Deleting an Element Item Group Entry

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.

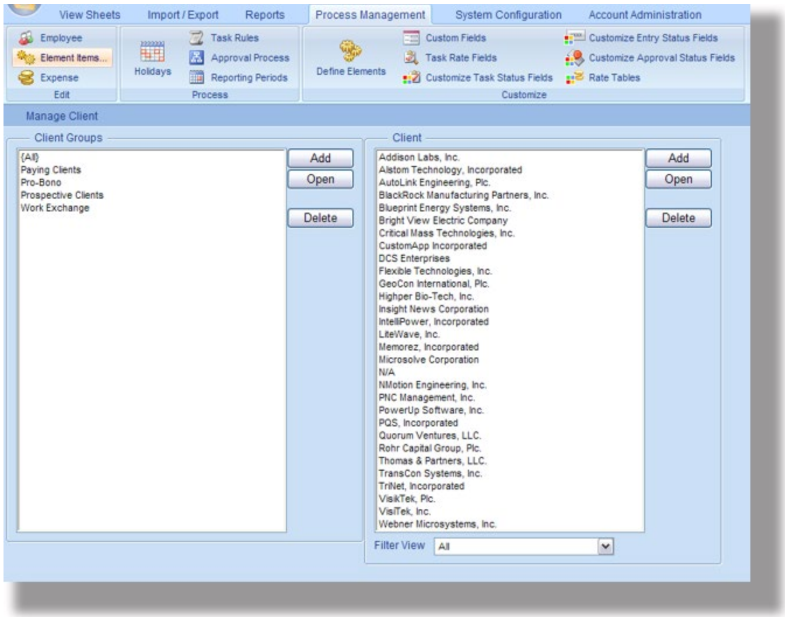
A drop-down menu appears that contains the elements that you have previously defined.



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:

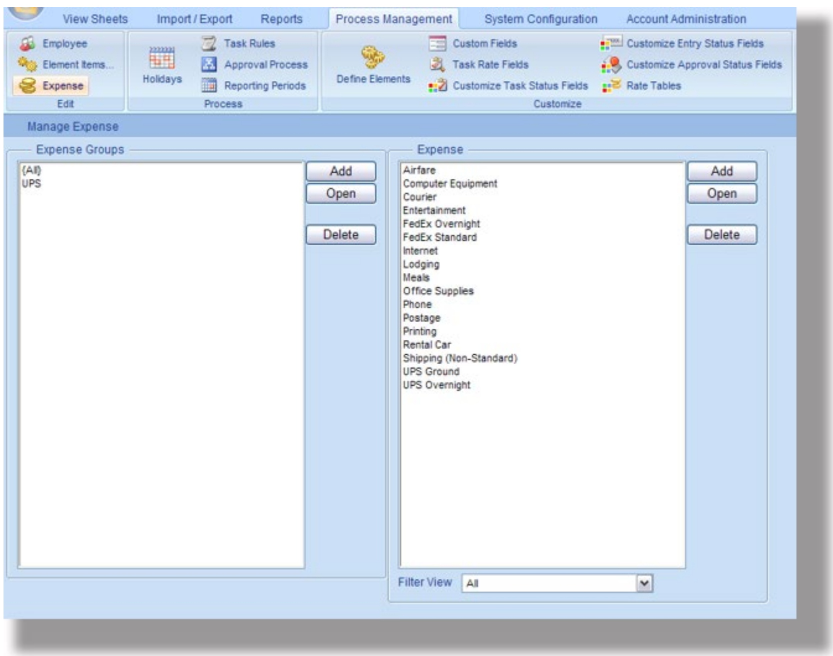
To delete such a group, you will first have to remove the entries from the group.

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 **Add** button to add a new Expense Item.	
The Open button	Select an Expense Item in the list box and click the **Open** button to view or make changes to the Expense Item.	
The Delete button	Select an Expense Item in the list box and click the **Delete** button to delete the Expense Item.	

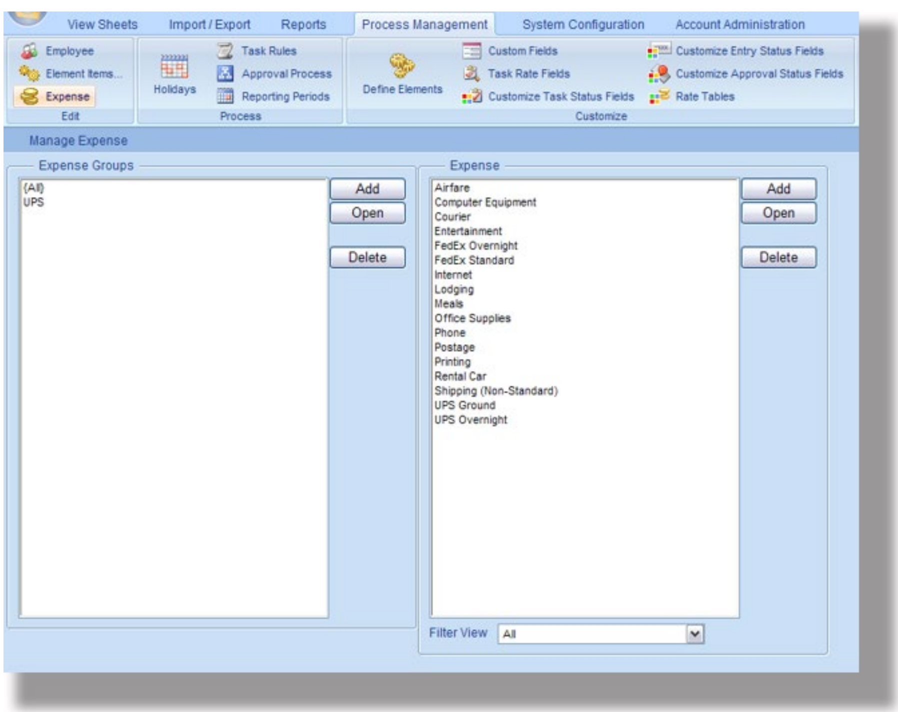
Item	How to use the Item	Default Value (if any)
Filter View	Select whether to view only active entries, inactive entries or all entries.	All
Expense Groups panel	This panel displays the list of Expense Groups that have been defined till now. It also has buttons to add, view/edit and delete Expense Groups.	
The Add button	Click the **Add** button to add a new Expense Group.	
The Open button	Select an Expense Group entry in the list box and click the **Open** 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 **Delete** button to delete the Expense Group entry.	

Adding an Expense Item Entry

To add an Expense Item entry:

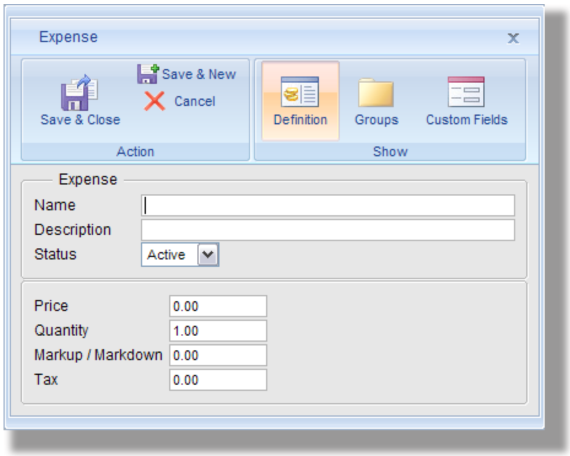
1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen will appear…



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

The Expense dialog box will appear…

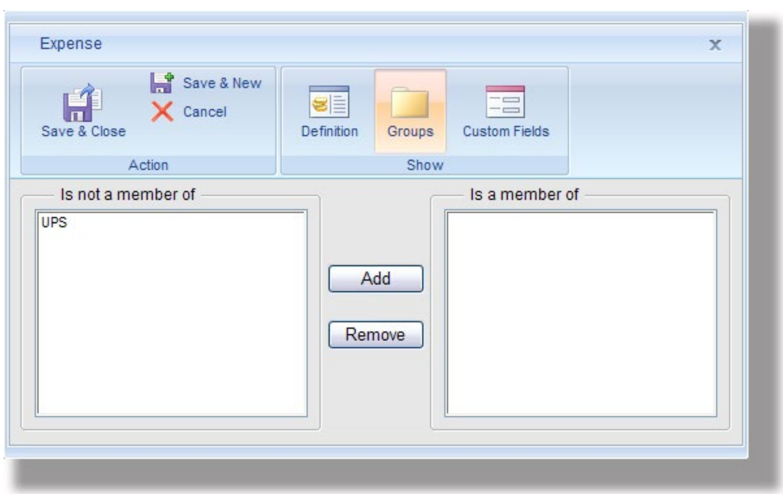


3. In the Expense panel, type a name and a description for the expense item. Also, select the status of the item—Active or Inactive.
4. In the Price text box, enter a default price for the expense item.
5. In the Quantity text box, enter a default quantity for the expense item.
6. In the Markup/Markdown 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

8. Click on the **Groups** button to display the Groups panel.



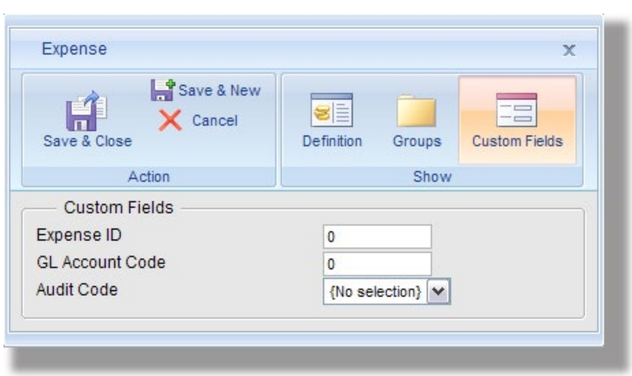
Use the Groups panel to assign the expense to one or more groups.

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 **Is not a member of** panel displays the Expense Groups (if any) that have not been assigned to the expense item.	
Is a member of	The **Is a member of** panel displays the Expense Groups (if any) that have been assigned to the expense item. **NOTE:** If you are creating a new entry, the **Is a member of** panel will be empty until you assign the expense item to a group.	
The Add button	Select one or more group names from the **Is not a member of** panel and click the **Add** button to make the expense item entry a part of those groups. When you click the **Add** button, the group names that you have selected will shift to the **Is a member of** panel, indicating that the expense item is now a member of those groups.	
The Remove button	Select one or more group names from the **Is a member of** panel and click the **Remove** button to remove the expense item entry from those groups. When you click the **Remove** button, the group names that you have selected will shift to the **Is not a member of** 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.



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...

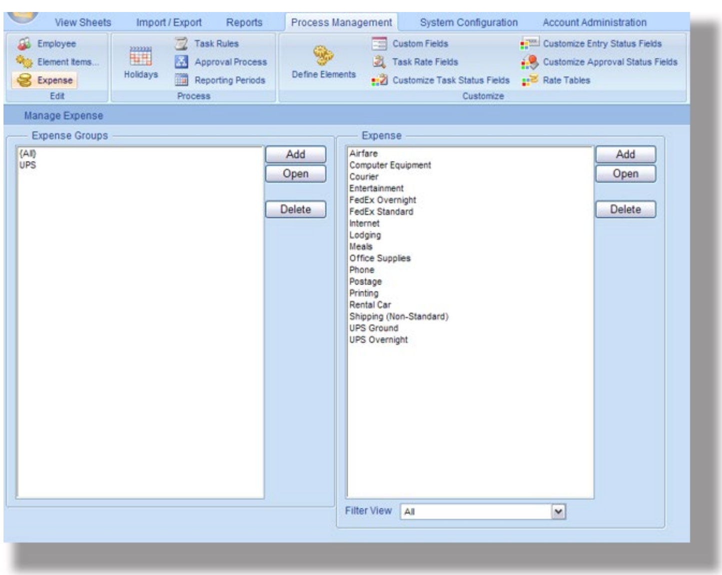
Do this...	To...
Click the **Save & New** button	Save this Expense Item entry and start creating a new Expense Item entry.
Click the **Save & Close** button	Save this Expense Item entry and return to the **Manage Expense** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Expense** dialog box	Return to the **Manage Expense** 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...

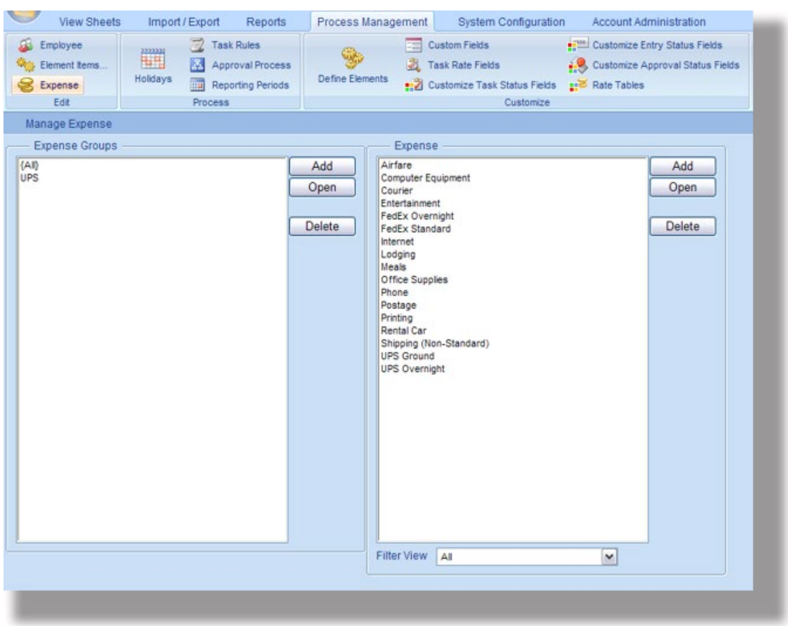
Do this...	To...
Click the **Save & New** button	Save the changes you have made to the Expense Item entry and start creating a new Expense Item entry.
Click the **Save & Close** button	Save the changes you have made to the Expense Item entry and return to the **Manage Expense** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Expense** dialog box	Return to the **Manage Expense** 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…

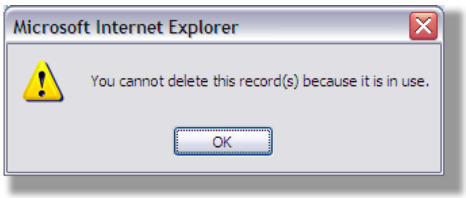


2. Select an Expense Item entry from the Expense panel and click the **Delete** button.

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:



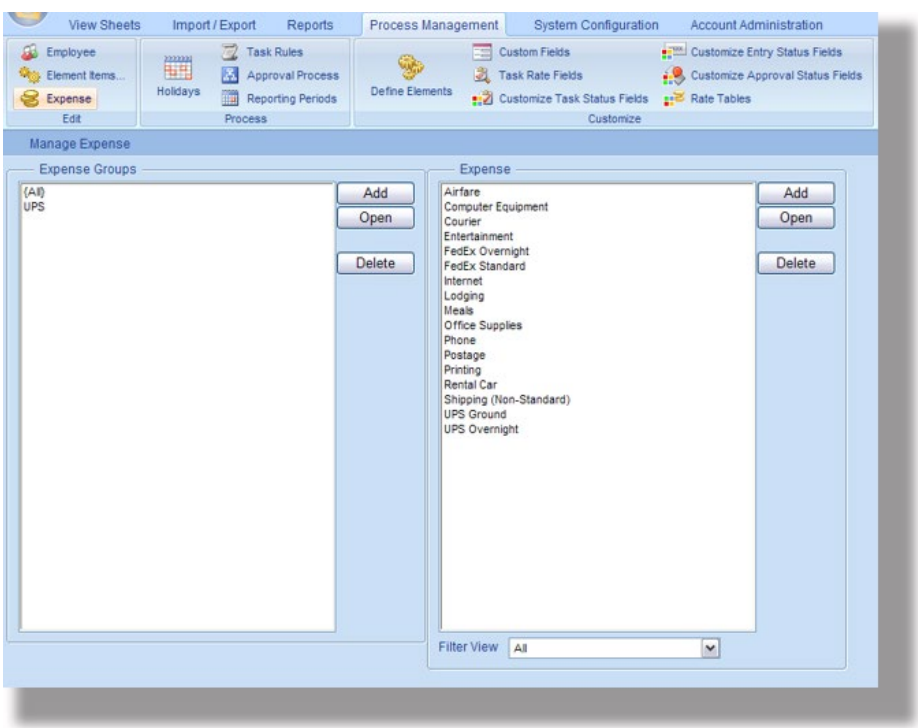
Creating an Expense Group Entry

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:

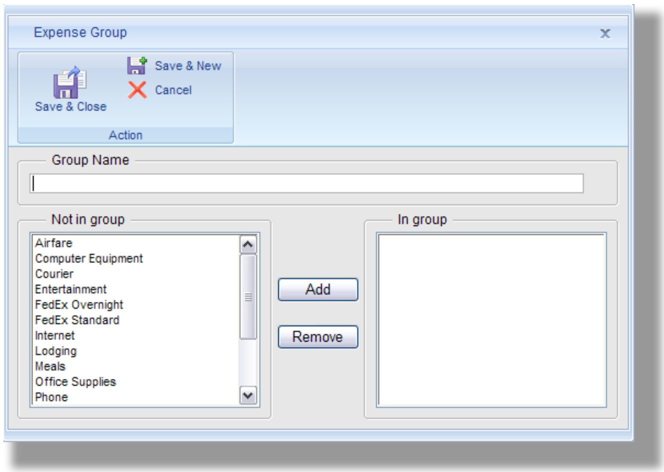
1. Click on the **Expense** icon in the Process Management tab.

The Manage Expense screen will appear…



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

The Expense Group dialog box will appear…



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 **Not in group** panel displays the names of Expense Items that have not been assigned to the group.	
In group	The **In group** panel displays the names of Expense Items that have already been assigned to the group. **Note:** If you are creating a new entry, the **In group** panel will be empty until you add Expense Items to the group.	
The Add button	Select one or more Expense Items from the **Not in group** panel and click the **Add** button to add the Expense Items to the group. When you click the **Add** button, the Expense Items that you have selected will shift to the **In group** panel, indicating that the Expense Items are now members of the group.	
The Remove button	Select one or more Expense Items from the **In group** panel and click the **Remove** button to remove the Expense Items from the group. When you click the **Remove** button, the Expense Items that you have selected will shift to the **Not in**	

Item	How to use the Item	Default Value (if any)
	group 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...	To...
Click the **Save & New** 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 **Manage Expense** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Expense Group** dialog box	Return to the **Manage Expense** 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.

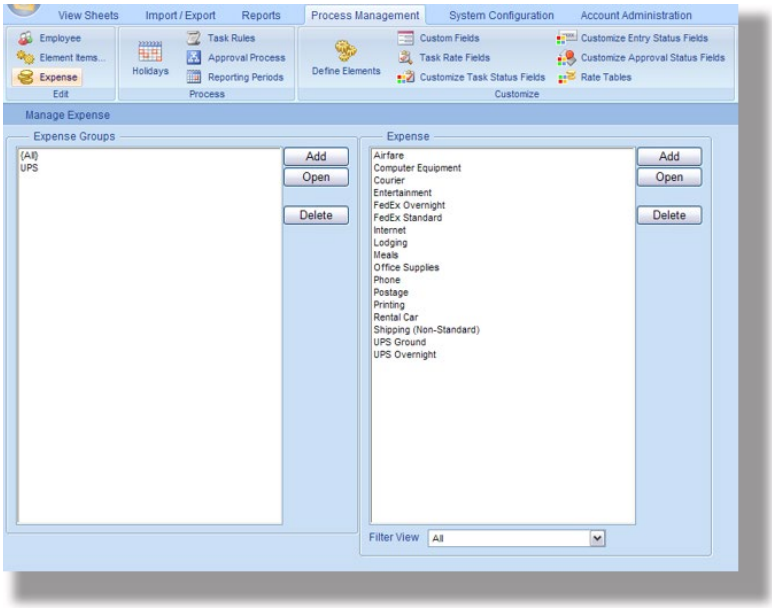
TIP: If you click on {All} in the Expense Groups panel, Office Timesheets will display the names of all the expense items.

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...



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...

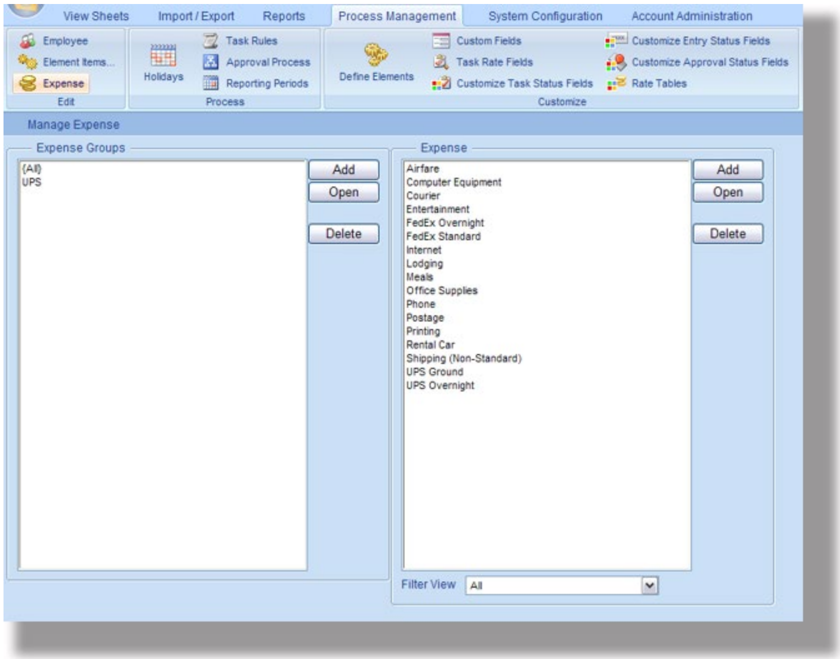
Do this...	To...
Click the **Save & New** button	Save the changes you have made to the Expense Item entry and start creating a new Expense Group entry.
Click the **Save & Close** button	Save the changes you have made to the Expense Group entry and return to the **Manage Expense** screen.
Click the **Cancel** button or the **Close** button on the top right corner of the **Expense Group** dialog box	Return to the **Manage Expense** 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 …

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.

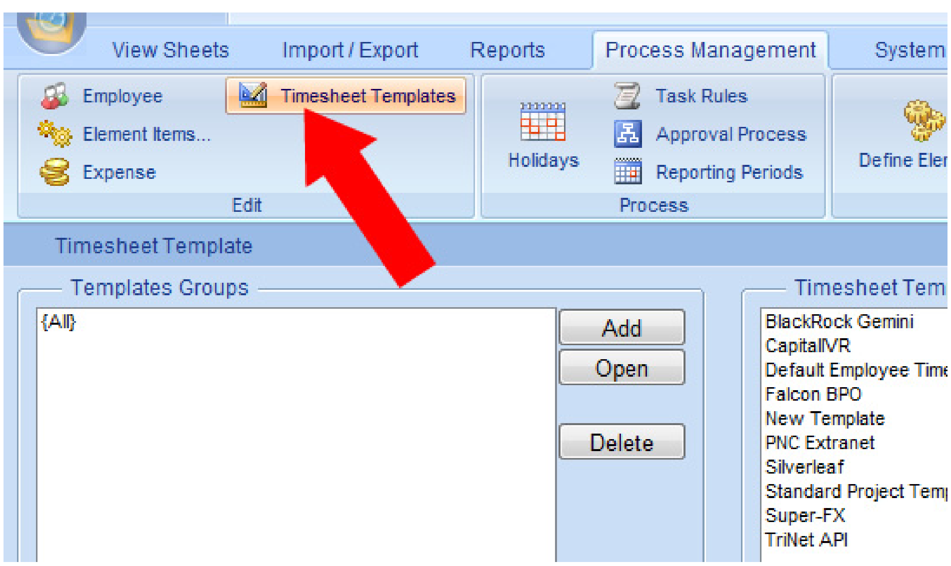
Timesheet Template Administration

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).

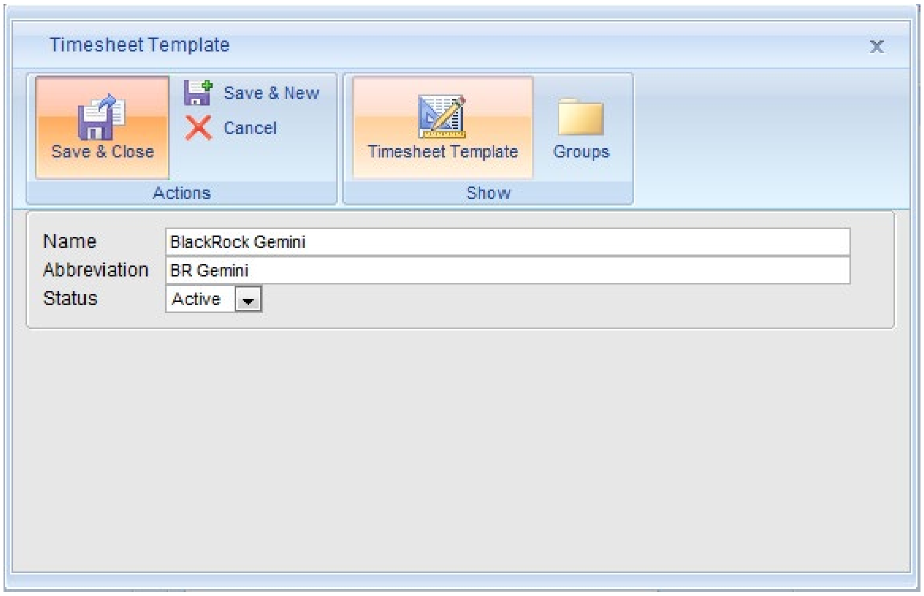


Editing Existing Templates

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).

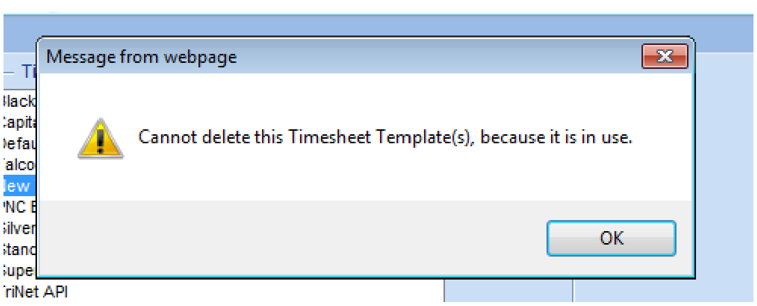


Deleting a Template

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…

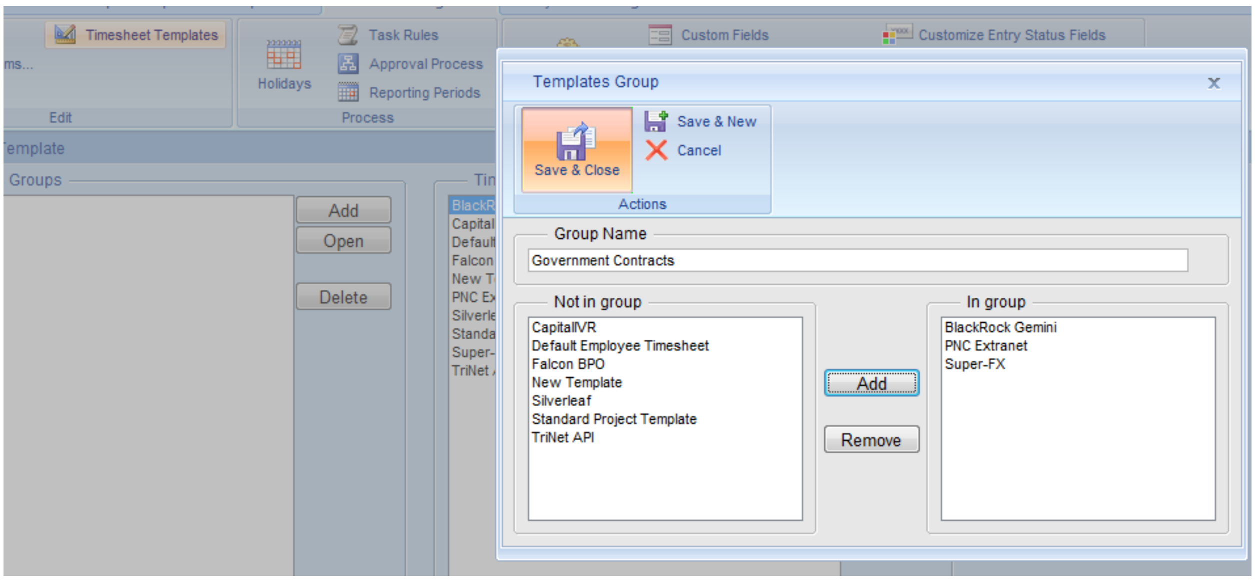


Timesheet Template task can be deleted using the Delete Tasks & Entries function found in View Sheets tab.

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:

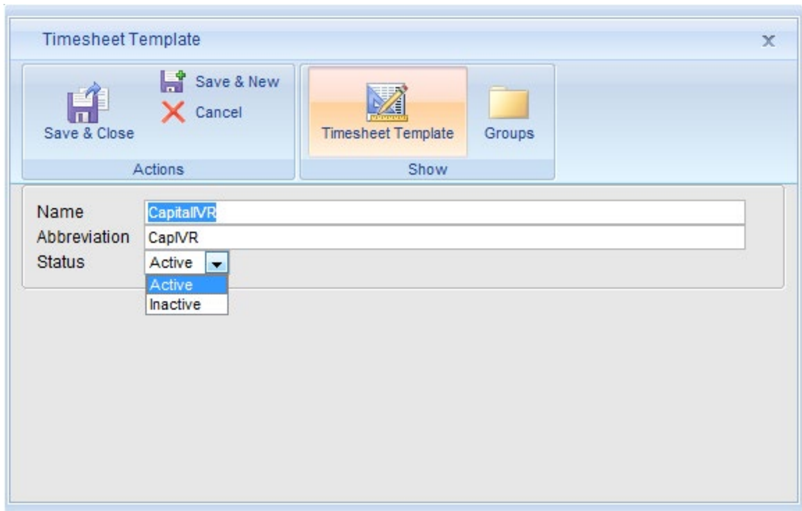
1. Click on the Process Management tab; and then click on the **Timesheet Templates** icon in the Edit ribbon group.
2. Click the **Add** button in the Templates Groups column.
3. Type in a Group Name for the Template Group; select the Timesheet Templates you wish to place in the group from the Not in 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).



Setting a Template's activity status (Active/Inactive)

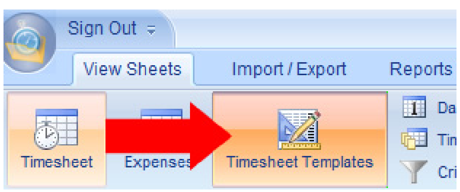
To change a Timesheet Templates activity status:

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**.

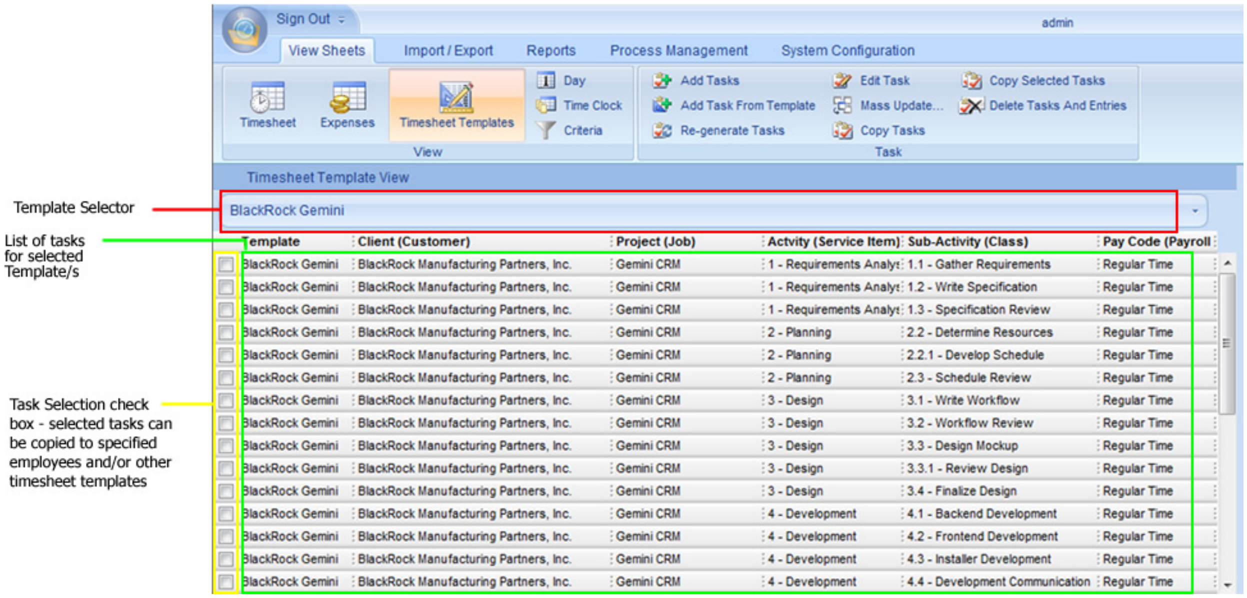


Managing Template Tasks

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.



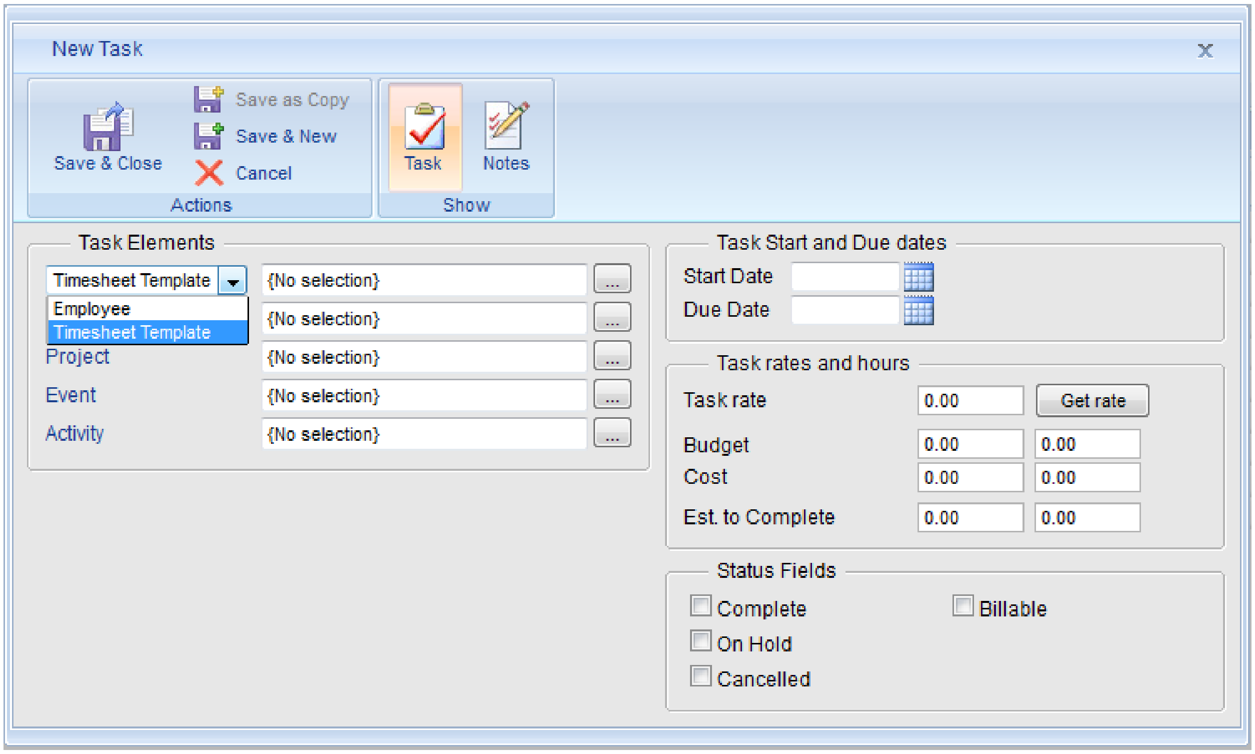
The templates task view is similar to the Timesheet view. However, unlike the Timesheet view, the Timesheet Templates view does not contain the time entry cell grid.



Adding Tasks to a Timesheet Template

To add a task to a timesheet template:

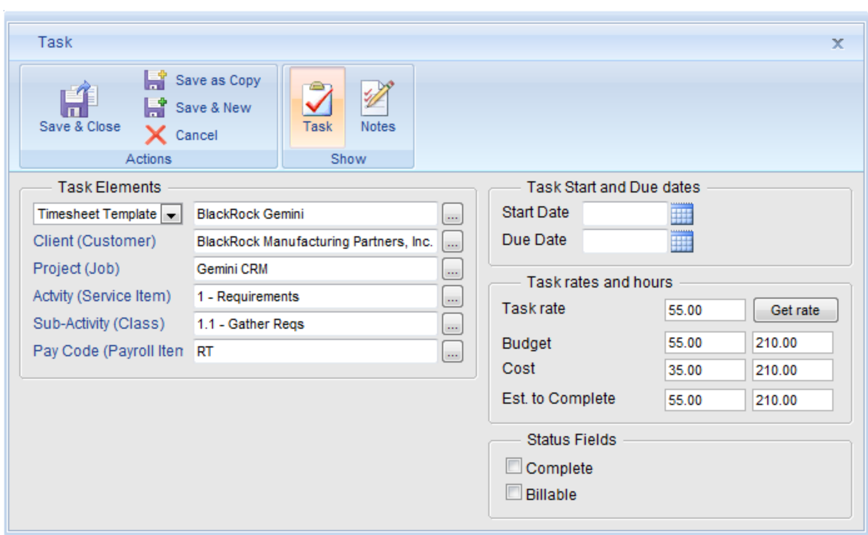
1. Click on the Add Tasks icon in the Task ribbon group in the View Sheets tab…the New Task dialog will appear.
2. Click on the Employee/Timesheet Template drop down and choose Timesheet Template; select the appropriate template name; choose appropriate elements items; enter Task Start and Due dates 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).



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.

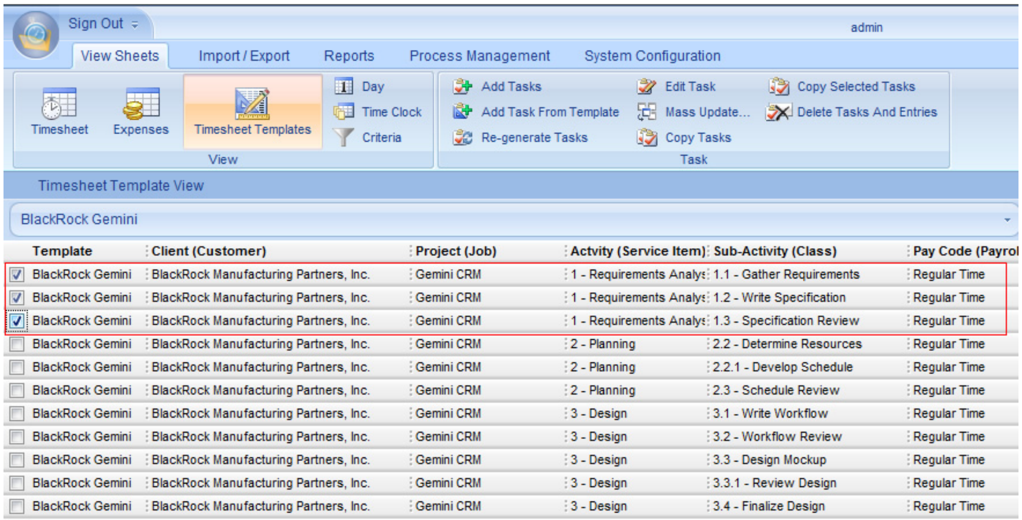


Copying Selected Timesheet Template Tasks

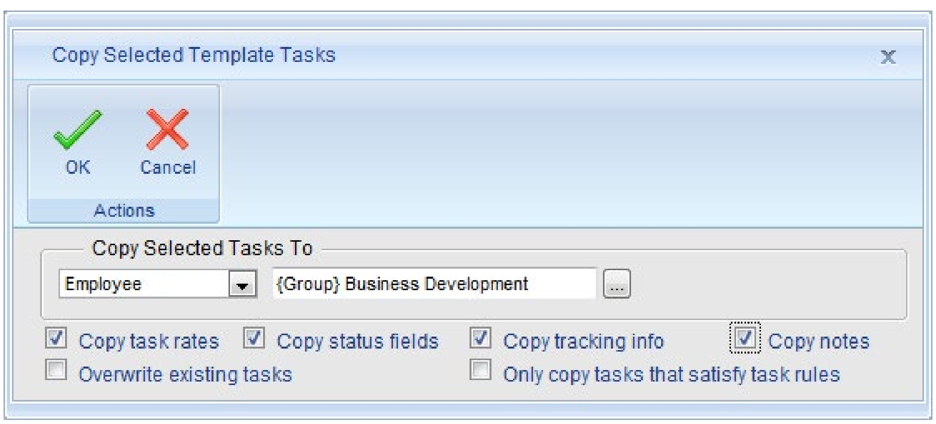
The Timesheet Templates Task view has built functionality to allows you easily select task from the view and quickly copy them to one or more employee timesheets; and/or one or more Timesheet Template Task Lists.

To copy selected timesheet template tasks:

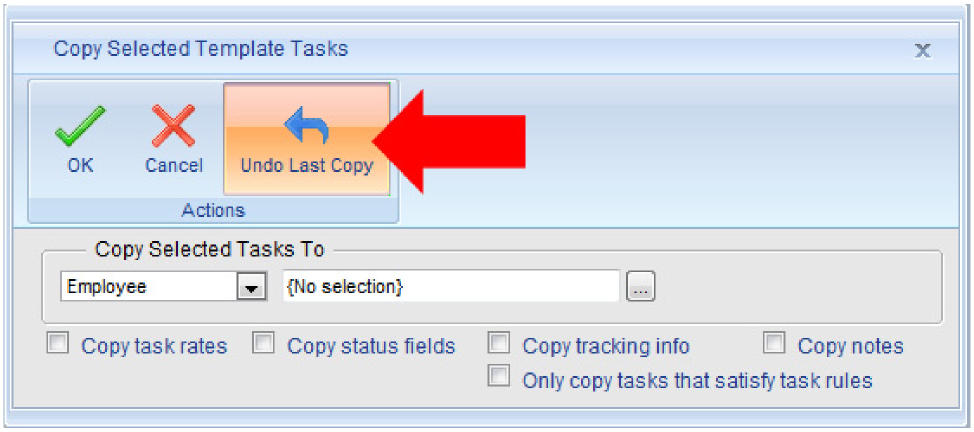
1. Select the tasks you wish to copy in the Timesheet Templates Task view by checking task's checkbox; and click on the Copy Selected Tasks icon in Task ribbon group.



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**.



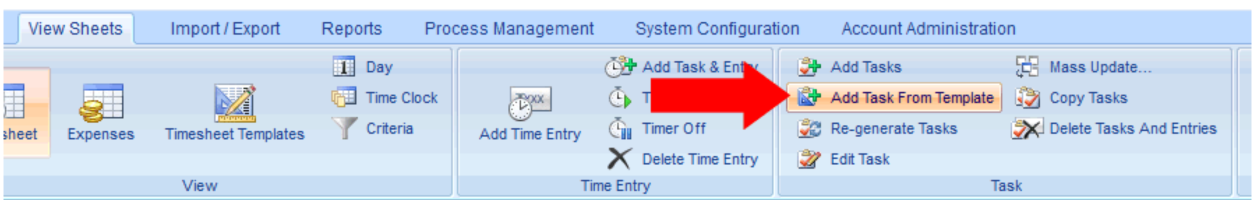
TIP: You can undo the last Copy Selected Task function you performed by clicking on the Copy Selected Task icon in the Tasks ribbon group of the View Sheets tab; and clicking on the Undo Last Copy icon in the Copy Selected Template Tasks dialog box.



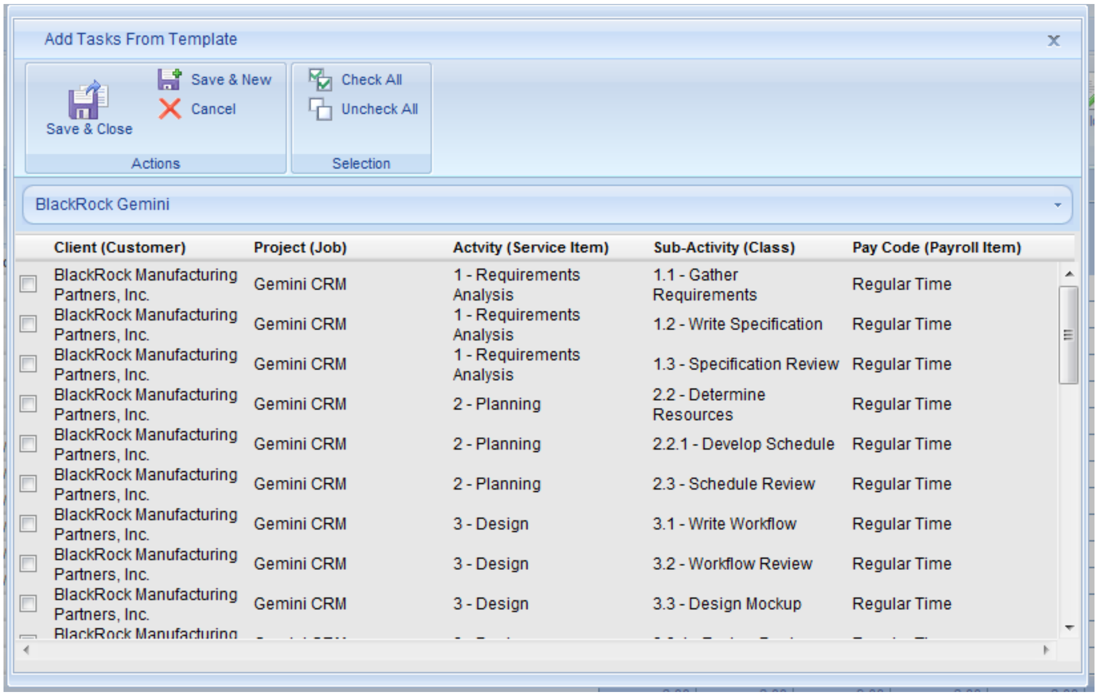
Using the "Add Tasks From Template" function

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.



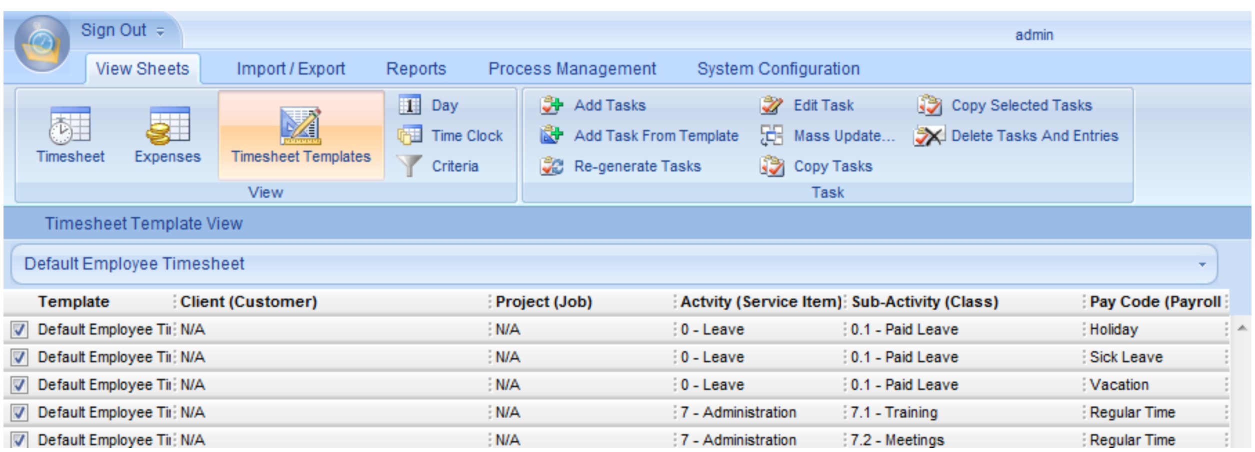
2. From the Add Tasks From Template dialog box select the template you wish to view in using the template selection drop drown; select the task/s you wish to add to your timesheet using the task selection checkbox in the **Add Tasks From Template** dialog box; and click **Save & Close** (or click **Save & New** if you wish to add more tasks immediately after the previous action).



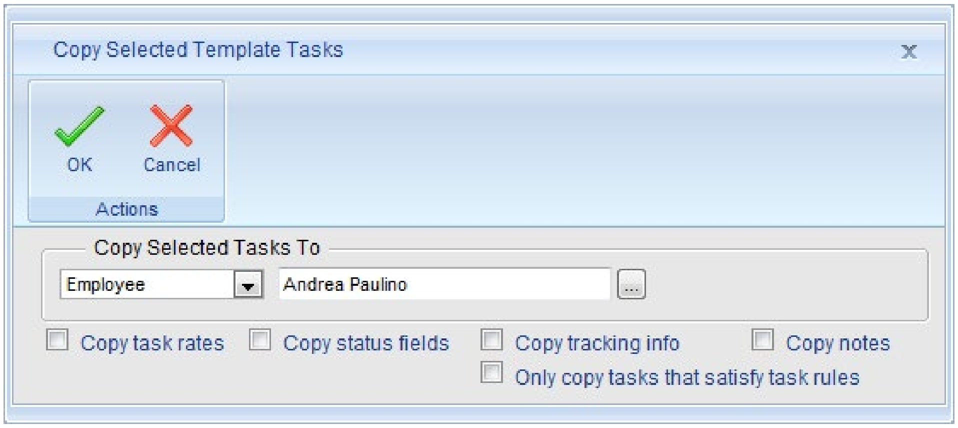
Example: Use Timesheet Templates to Create Default Employee Tasks

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...



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…



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.

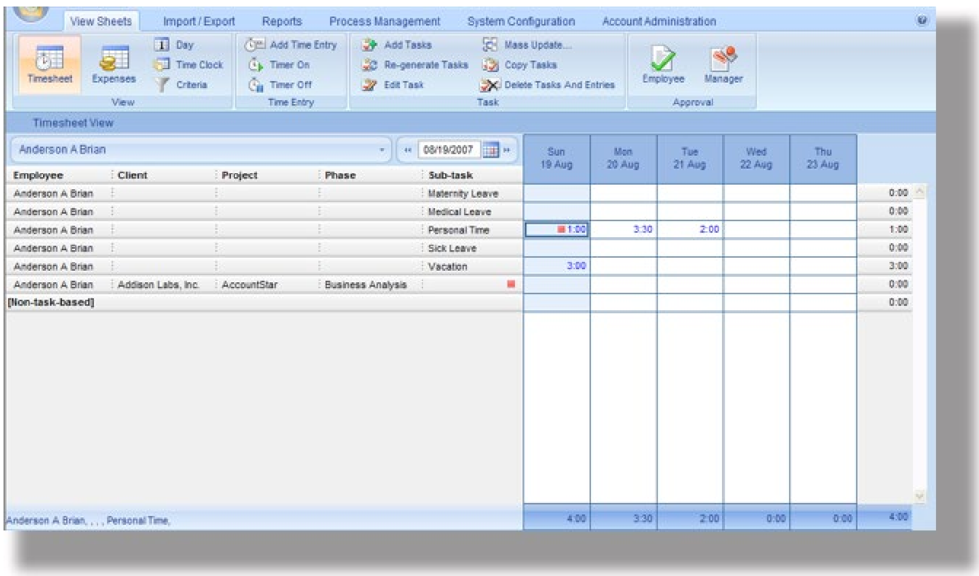
Timesheets and Expense sheets also provide a convenient way for your employees to keep track of the time and money spent on project related tasks. Employees can fill these time and expense sheets and submit them to their managers for approval.

Use the View Sheets tab to record your Time, Expense and Task entries. Using the functions of the View Sheets tab, you can:

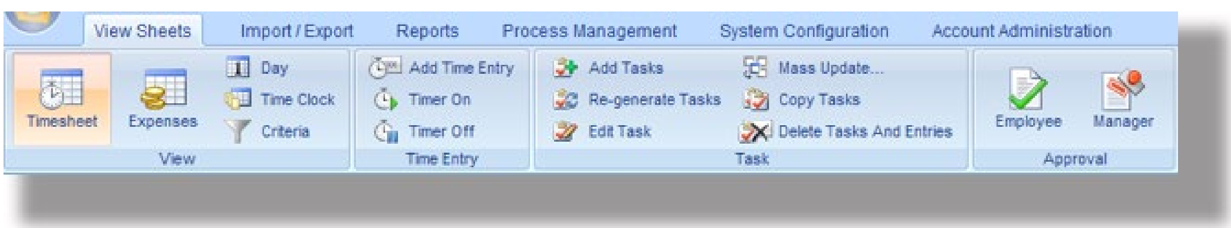
- View/edit your timesheet or the timesheet of any of your employees.
- View your timesheet in different ways—week view, day view, time clock view.
- Specify filter criteria to configure the timesheet view to your liking.
- Add/View/Edit time entries.
- Add/View/Edit expense entries.
- Add/View/Edit 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.



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.



The following table describes what each of the commands in the View Sheets tab does:

Click on...	To...
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...	To...
	Note: 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 Tasks	Add task entries to your timesheet. **Note:** 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:

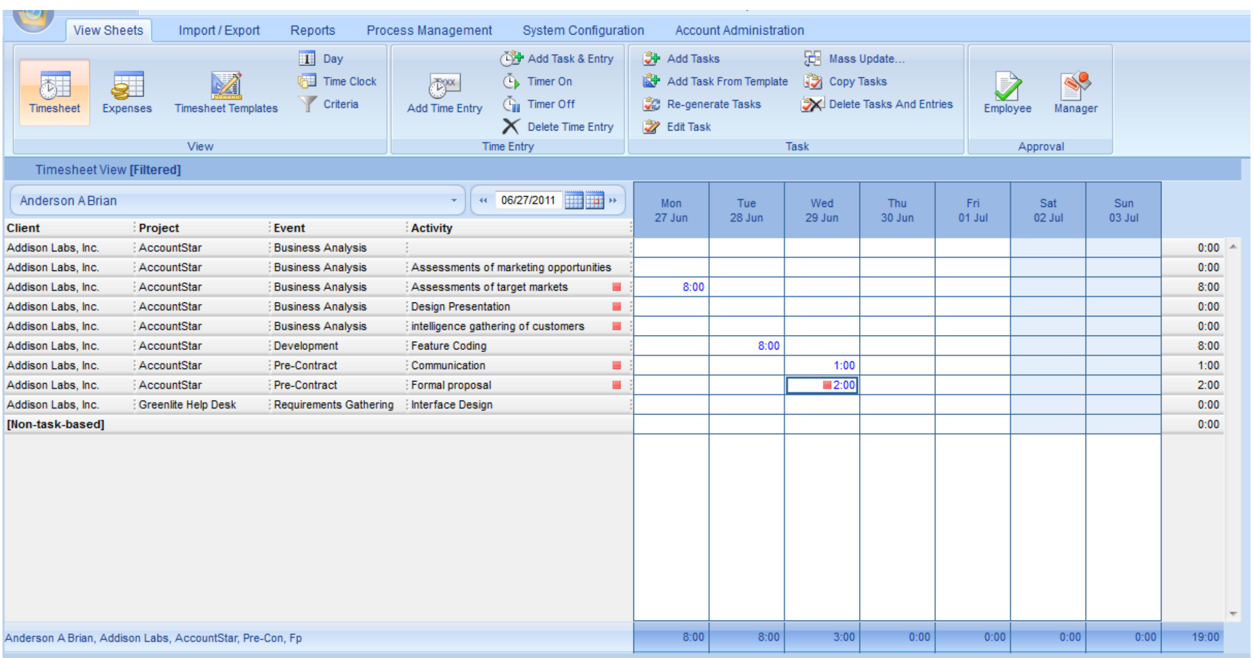
Click on...	To View...

Click on...	To View...
Timesheet	**The Default View** This 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	**The Day View** 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…



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).

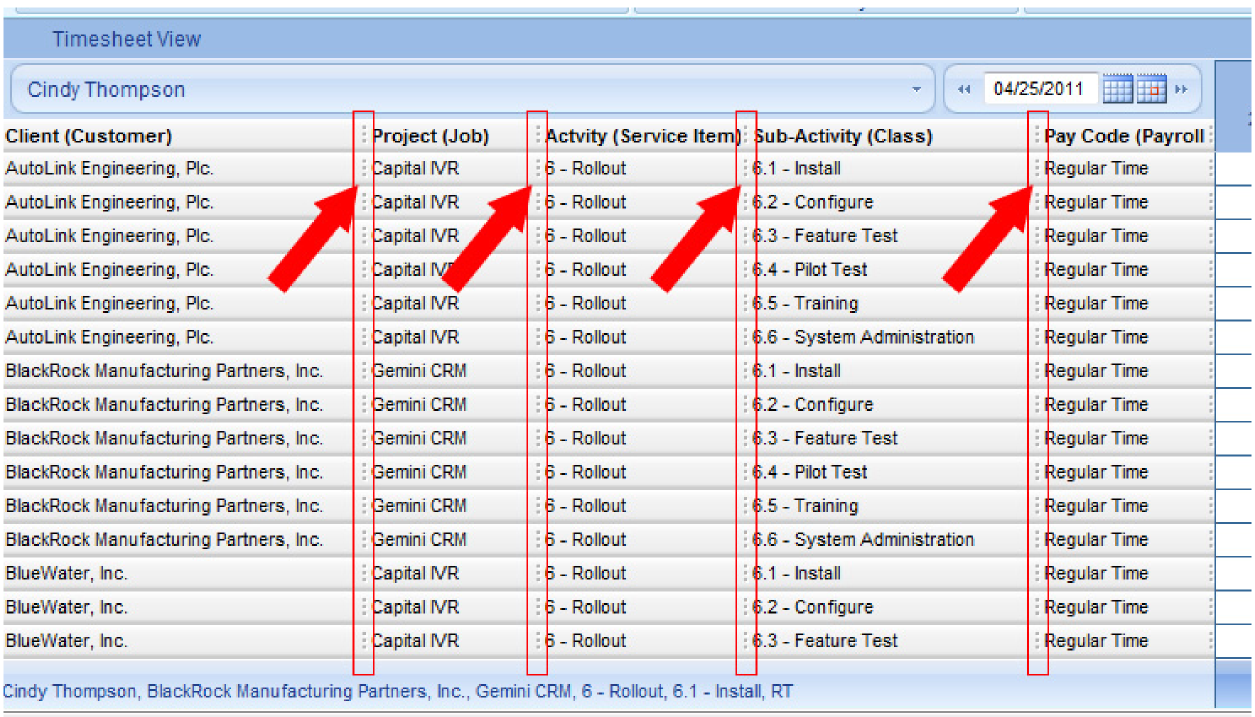
TIP: Use the Sheets View Criteria screen to configure the view of the timesheet.

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

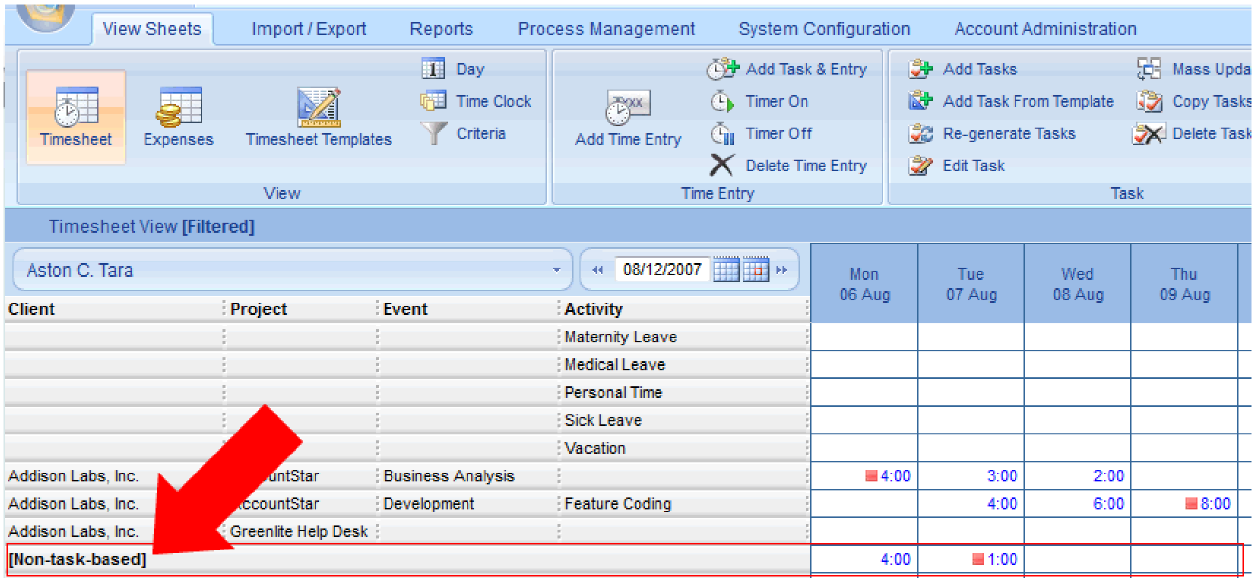
Office Timesheets will allow to adjust each task element column's width to your own personal preference. To adjust a particular column's width simply point your mouse at the task element column's divider in the column header; and while pressing down your mouse button expand the column to its desired width by dragging left or right.



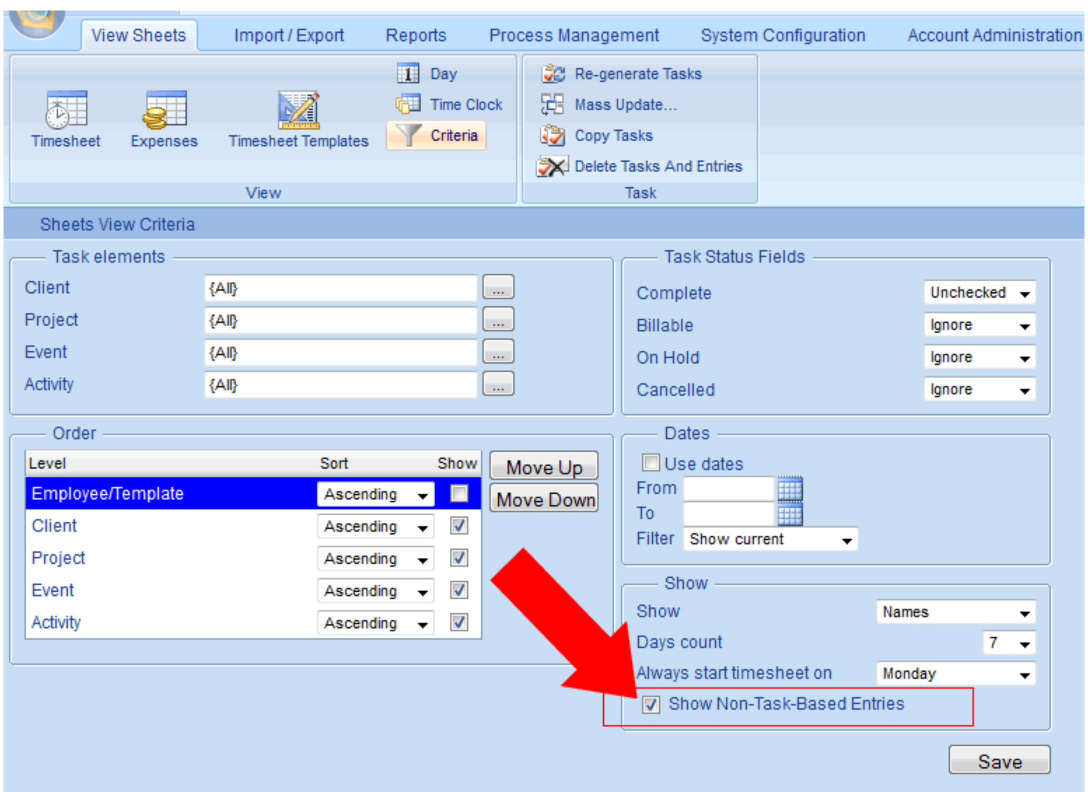
NOTE: Office Timesheets will save your task element column width settings until you change them again.

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-task-based 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.



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)*.



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

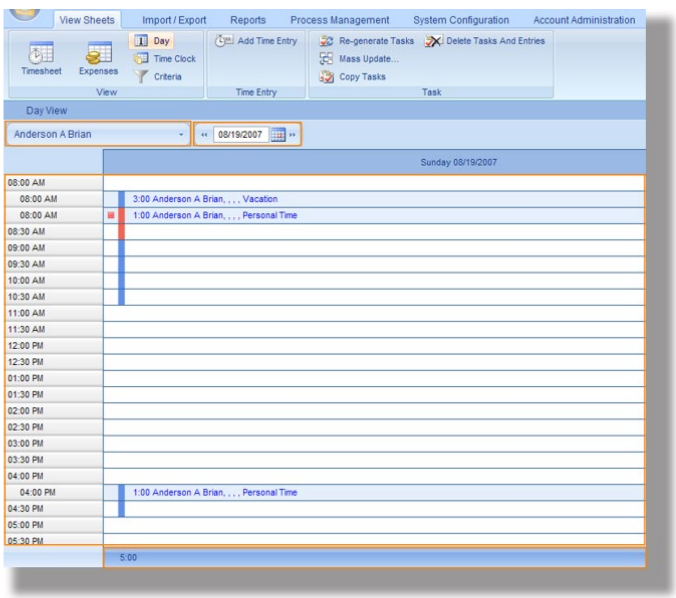
In the Day View, you get to see a day at a time. Using the Day View you can see how your tasks are spread out across the day. Use this view to set up or track tasks during the different time slots of the day.

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.



Time Clock View

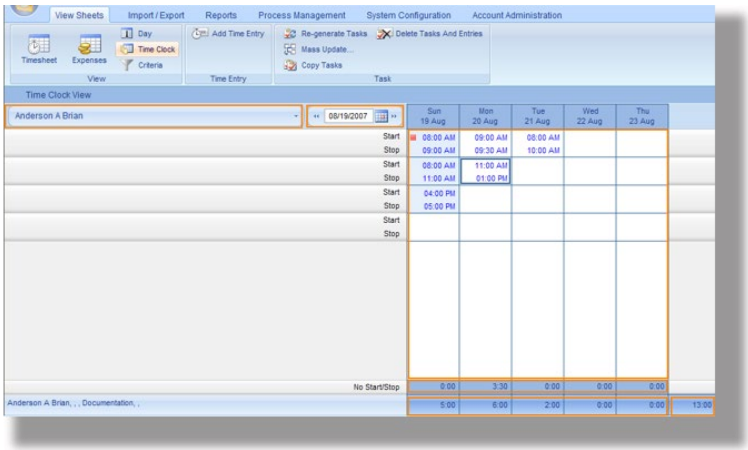
In the Time Clock View, you can see the starting and ending time of each task. In this view you will be able to see 5, 7 or 10 days at a time (depending on how you have set up the timesheet).

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.



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.

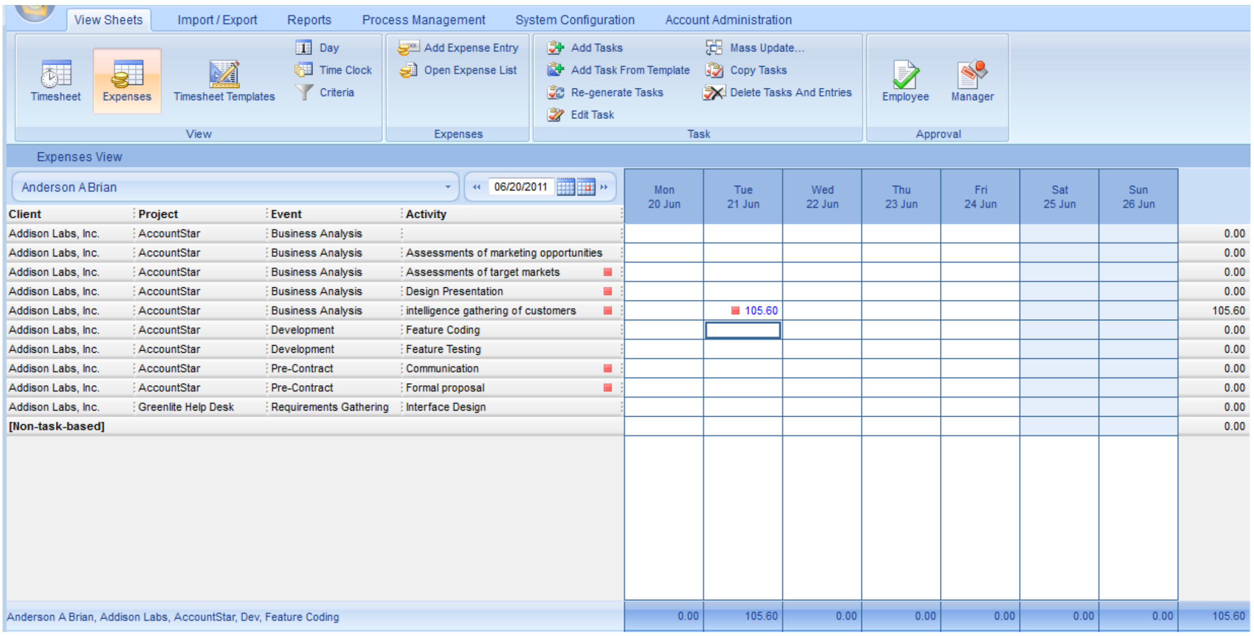
TIP: If a red square is displayed next to a task entry, it indicates that there is a note attached to that entry.

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.



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

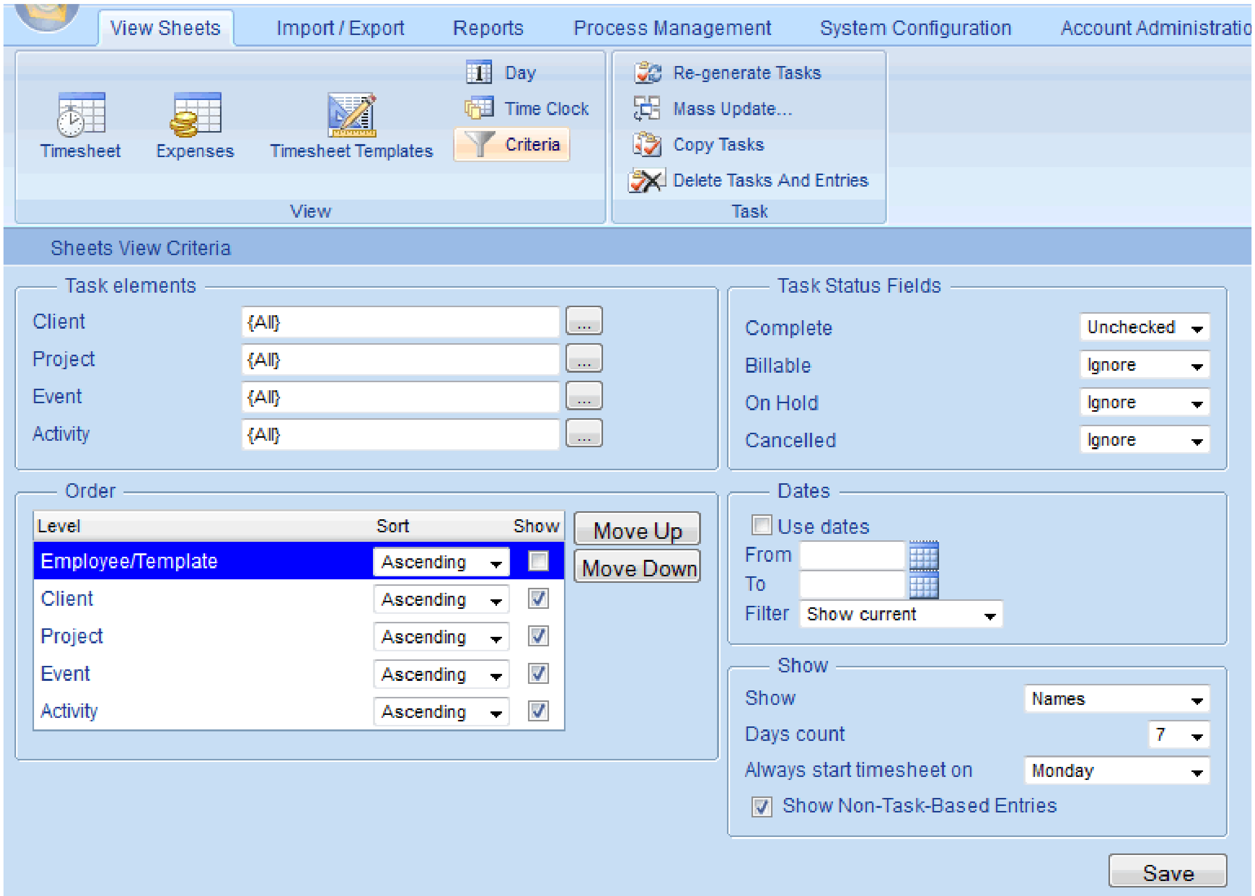
Office Timesheets allows each user to configure the View Criteria of their Timesheet and Expense sheet. The Sheets View Criteria tool allows you to:

- 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…



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:

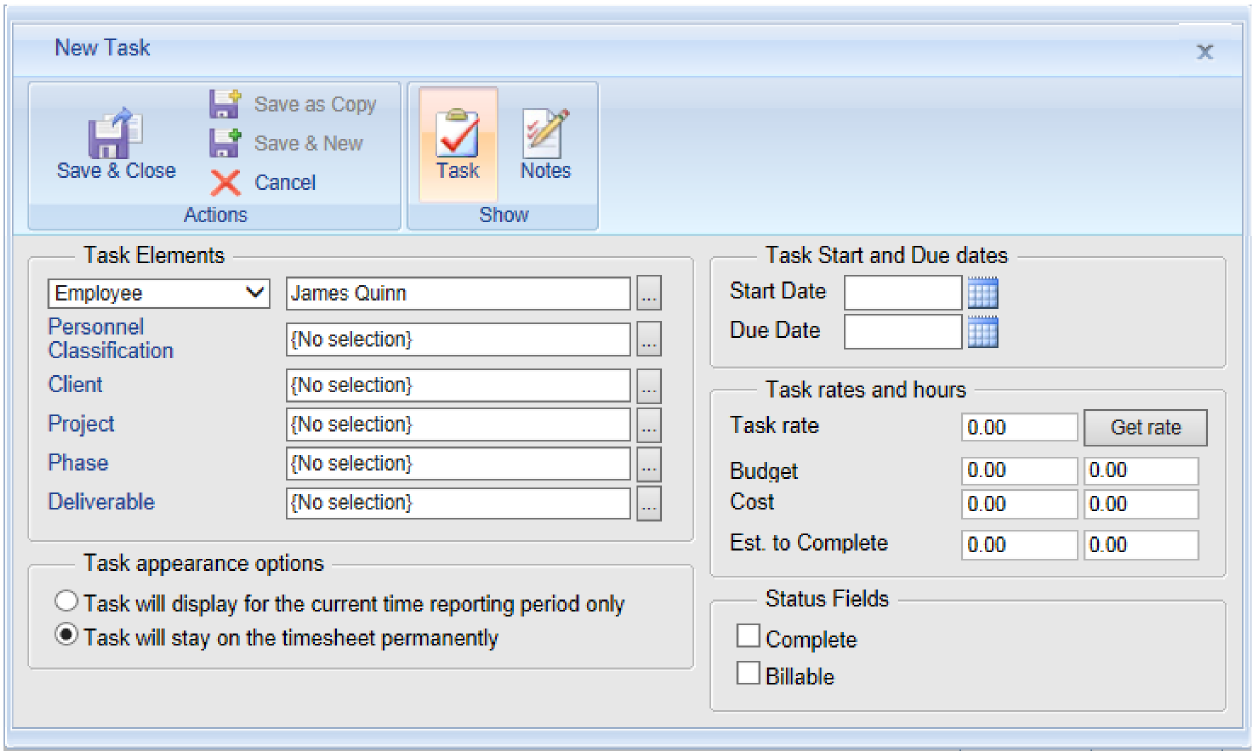
1. Open the specified user's security policy,

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…



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:

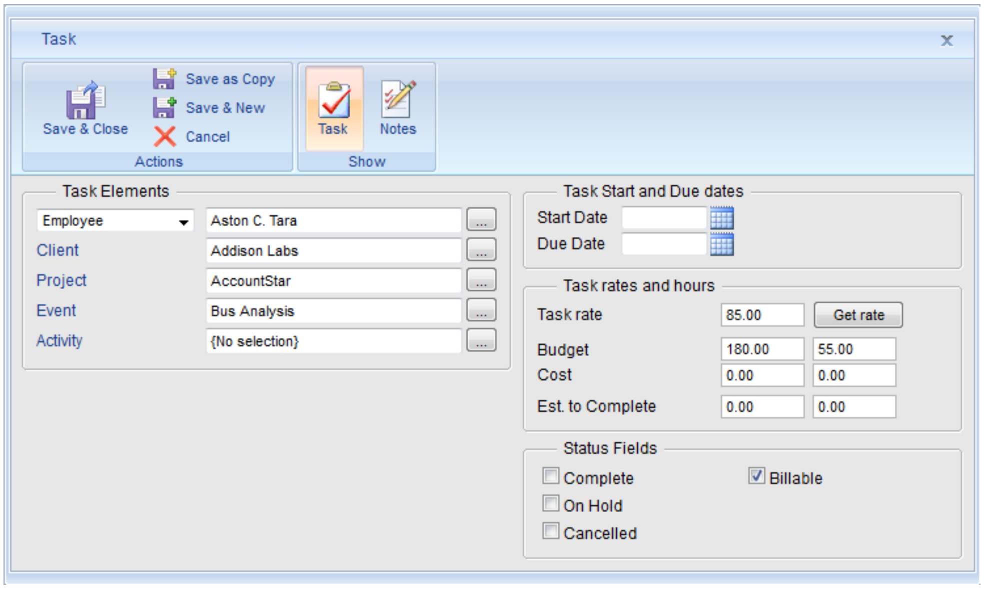
Do this...	To...
Click the **Save & New** button	Save this Task entry and start creating a new Task entry from scratch.
Click the **Save & Close** button	Save this Task entry and return to the timesheet.
Click the **Cancel** button or the **Close** button on the top right corner of the **Task** dialog 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…



3. Make the required changes to the Task.
4. Finally, do one of the following...

Do this...	To...
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 **Save as Copy** 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 **Cancel** button or the **Close** button on the top right corner of the **Task** dialog box	Return to the Timesheet without saving your changes.

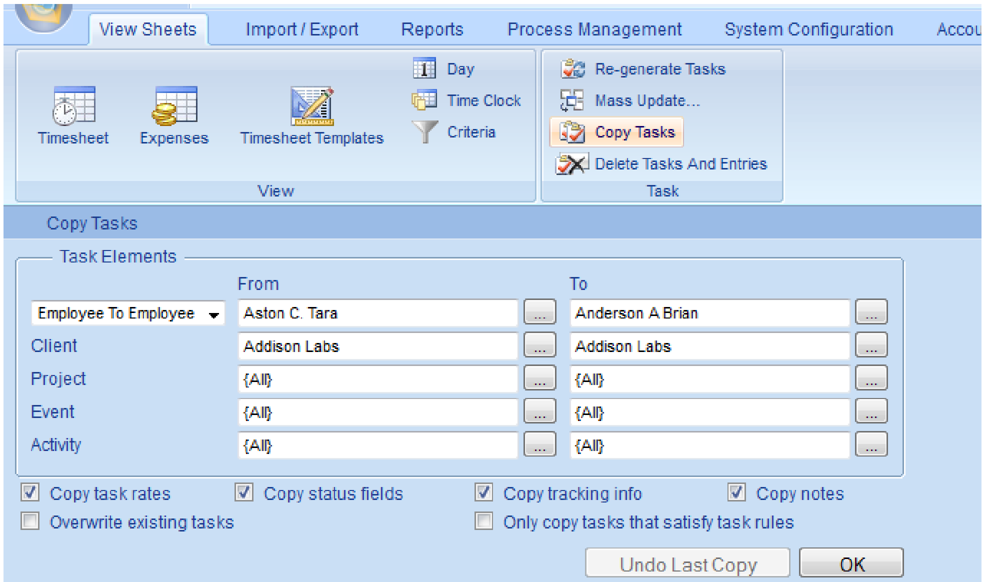
Copying Tasks between Timesheets

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...



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.

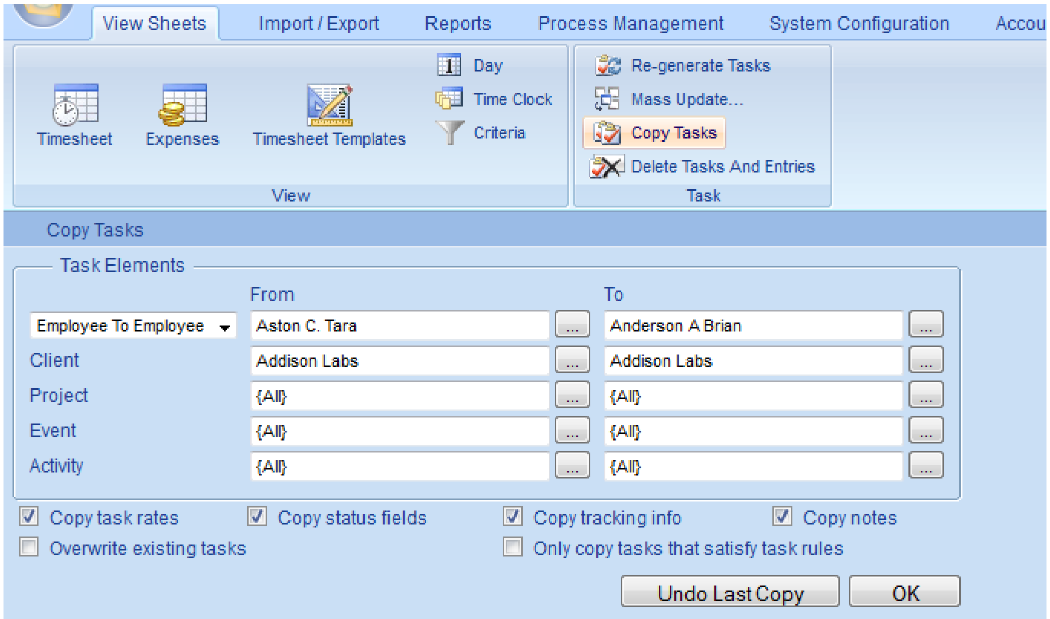
5. Finally, click the **OK** button.

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.



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.

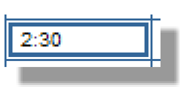
You can also use the Day View or the Time Clock View to make time entries.

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:

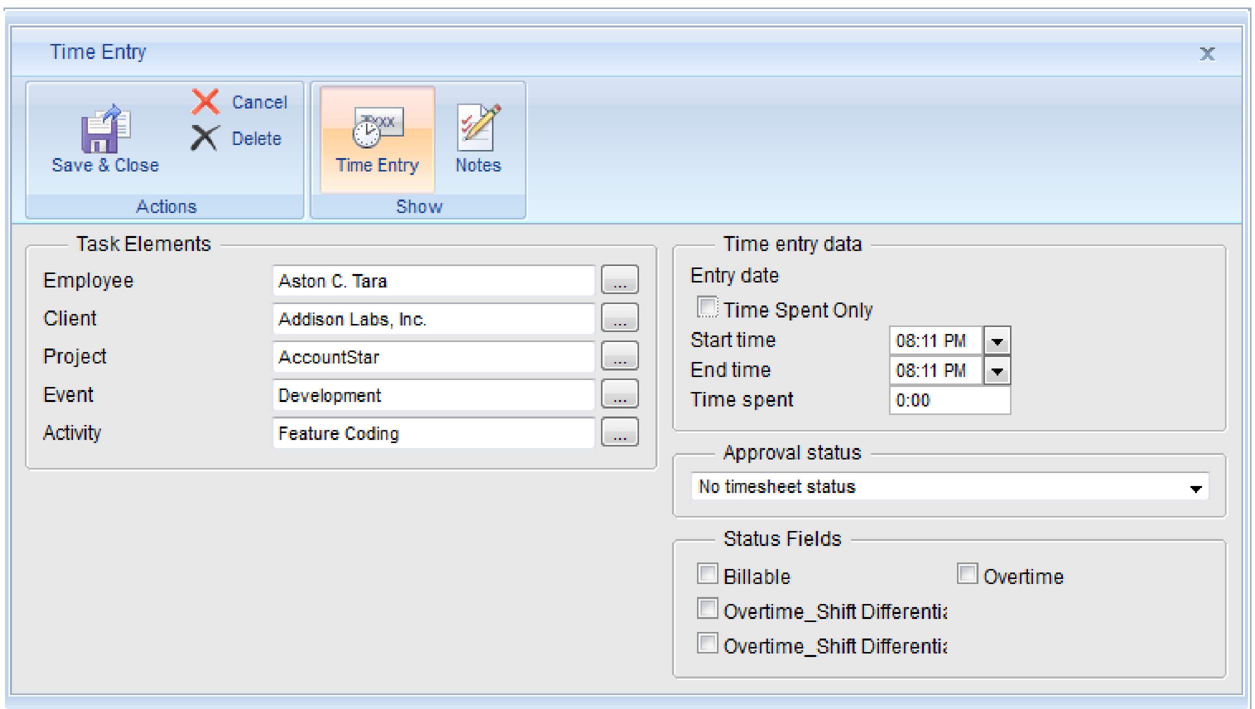
- There is already an entry in the cell; or
- You want to also enter other details for the entry such as the start and end time for the task, the status of the task etc.

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...



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

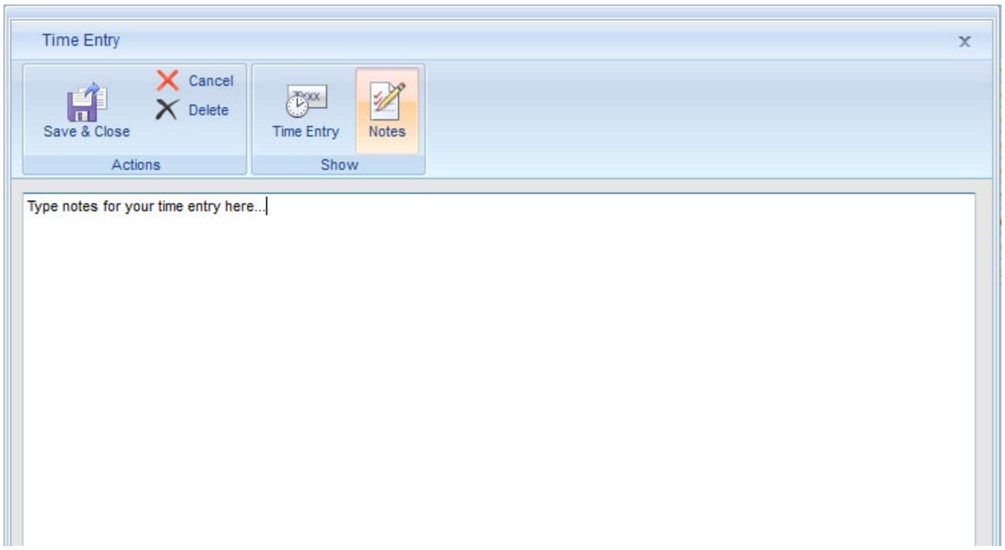
   In the Time entry data panel, specify the start time and time spent on the task. Office Timesheets will automatically fill in the end time for the task.

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.



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.

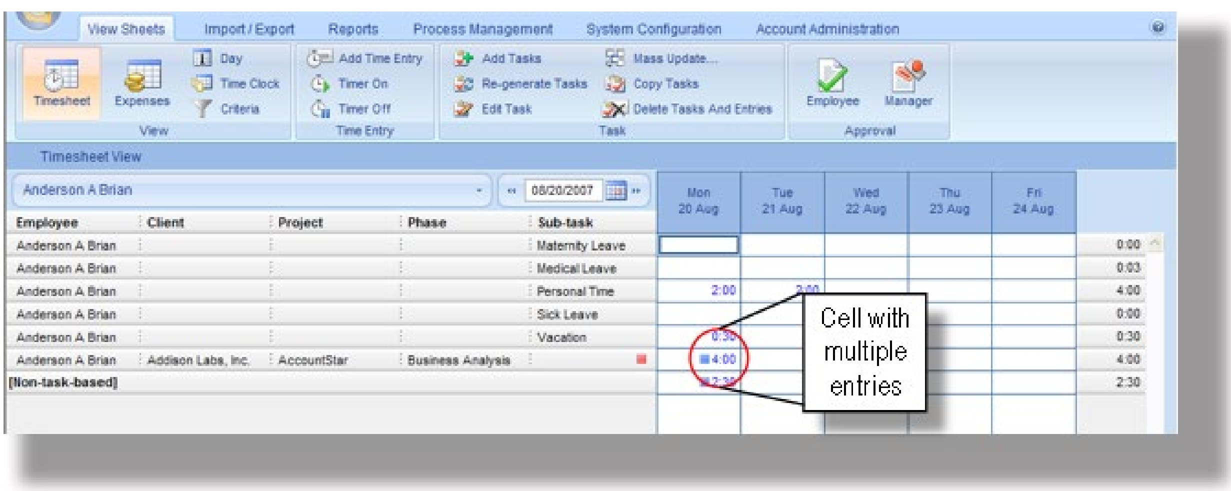
5. When you finish working on the task, return to the timesheet, click on the cell, and click on the Timer Off button.

Office Timesheets will display the time spent on the task in blue.

Using the Day View

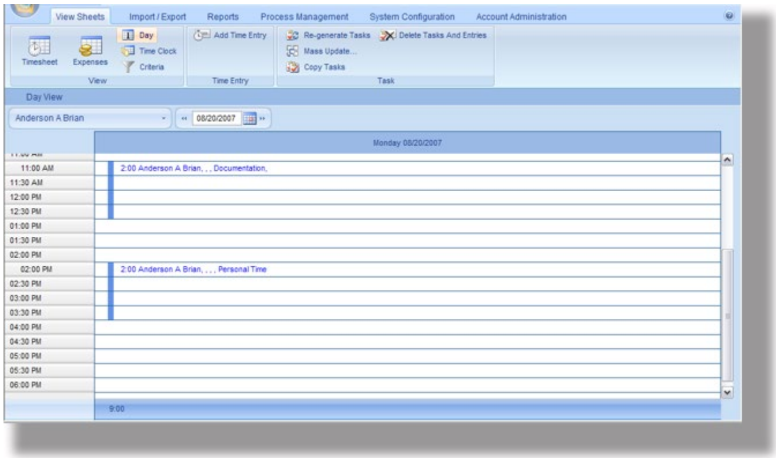
The default view of the timesheet displays a number of days at a time. (Office Timesheets can be set to display either 5, 7, or 10 days in the Timesheet view.

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.



To switch to the Day View:

- Click on Day in the View Sheets tab.



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.

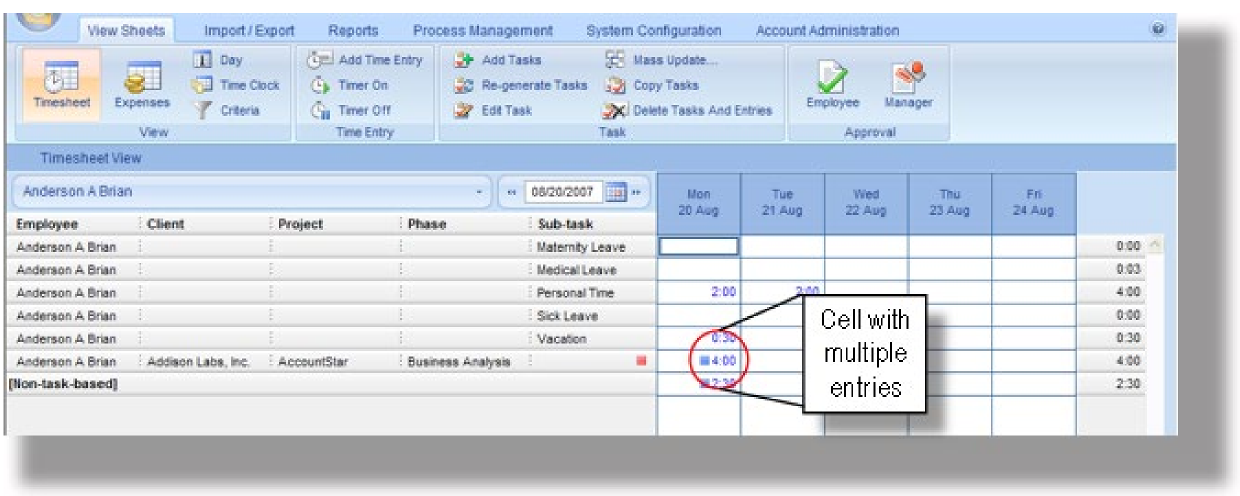
To enter a time entry in the Day View:

- Double-click on a time-slot (cell); or
- Click on a cell and then click on the Add Time Entry button.

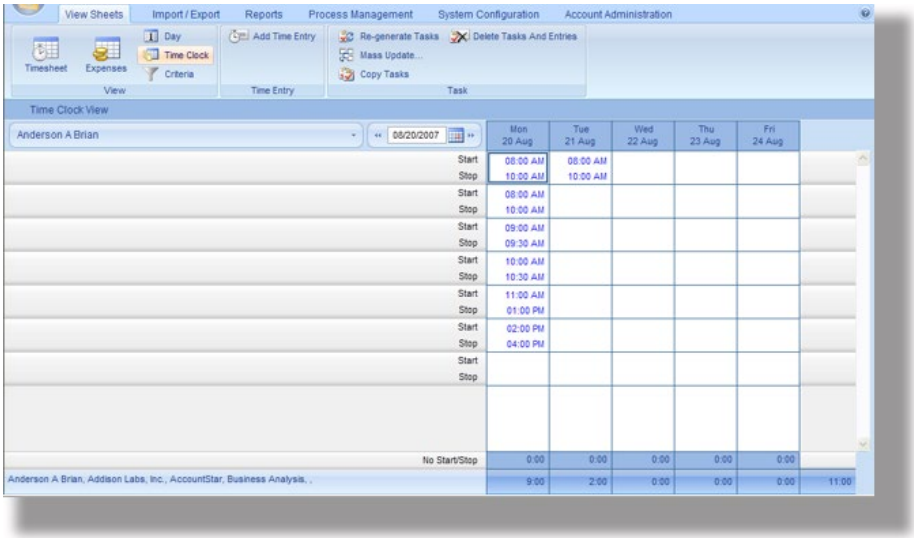
Using the Time Clock View

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.



Click on Time Clock in the View Sheets tab to switch to the Time Clock View:



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.

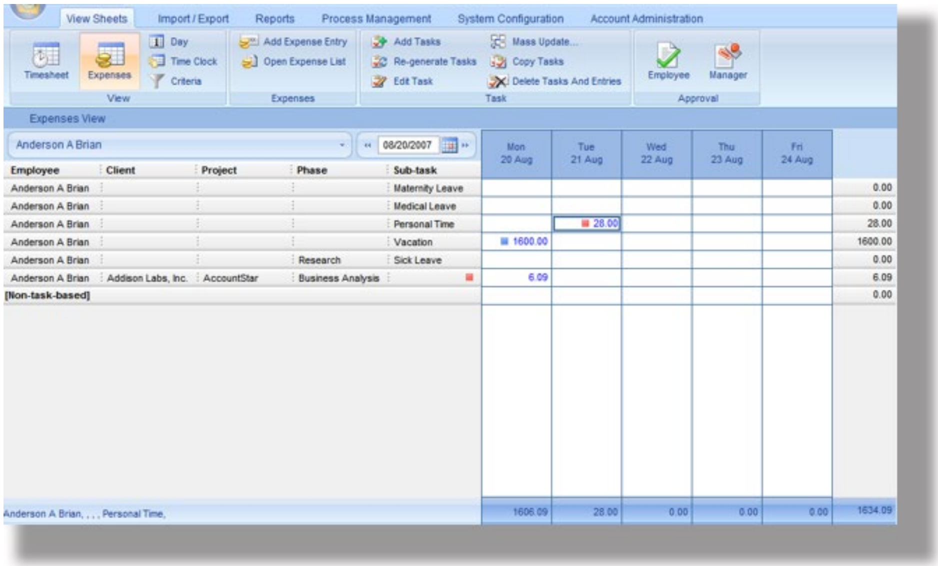
2. Make the required changes to the Time entry.
3. Click on the **Save & Close** button to save the changes and close the Time Entry dialog box; or click on the **Cancel** button to return to the timesheet without saving the changes you have made to the entry.

Adding Expense Entries

Use the Expense sheet to record or keep track of your project related expenses.

To add expenses to the Expense Sheet:

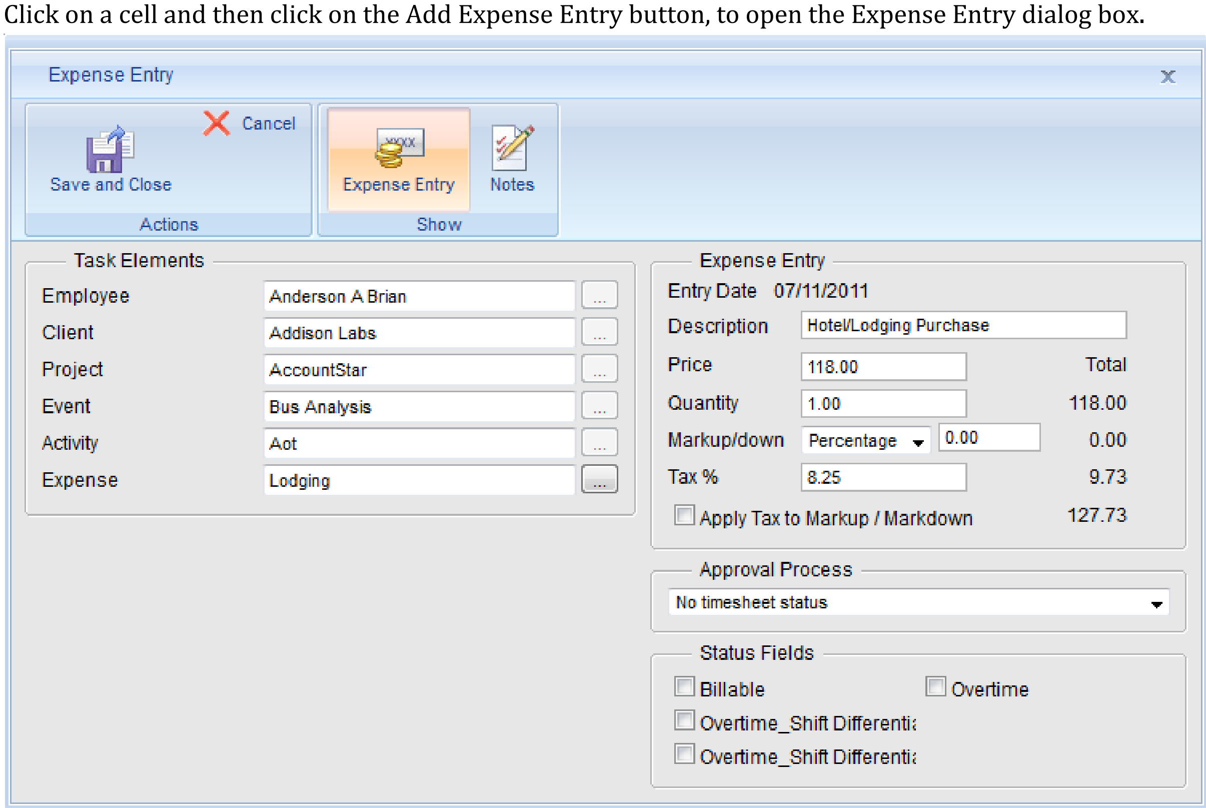
1. Click on Expenses in the View Sheets tab to open your Expense Sheet.



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.



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.

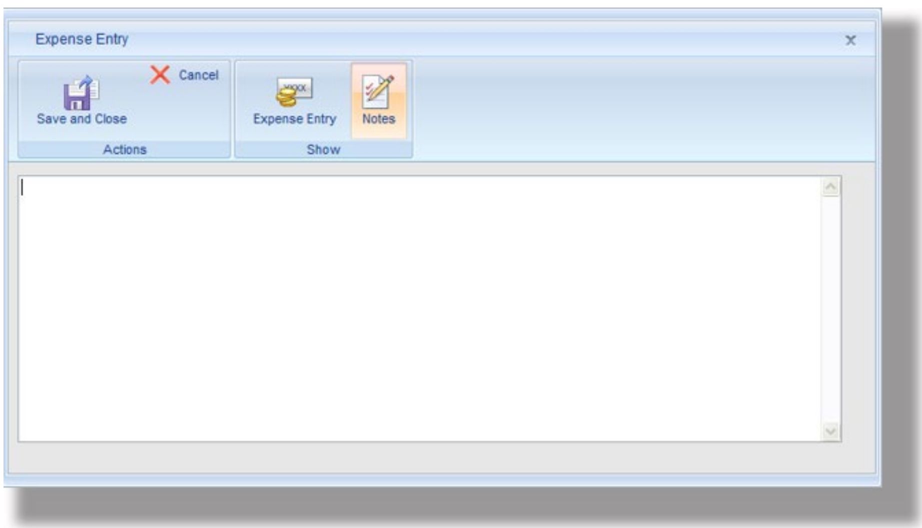
4. Enter the details of the expense entry in the Expense Entry panel.

   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.

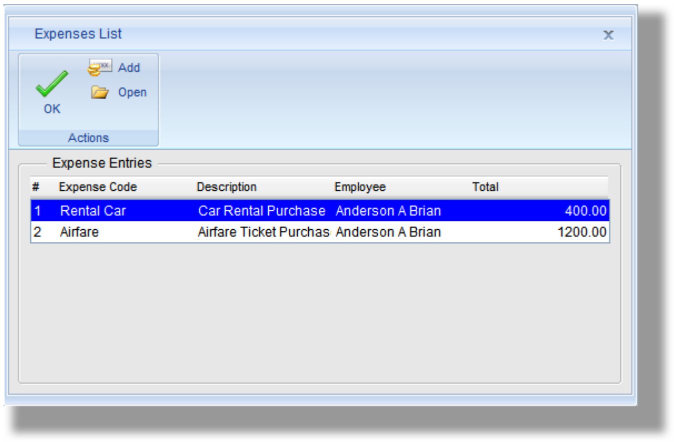
NOTE: If you have added a note to the entry, Office Timesheets will display a red square symbol in the cell.

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...



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.

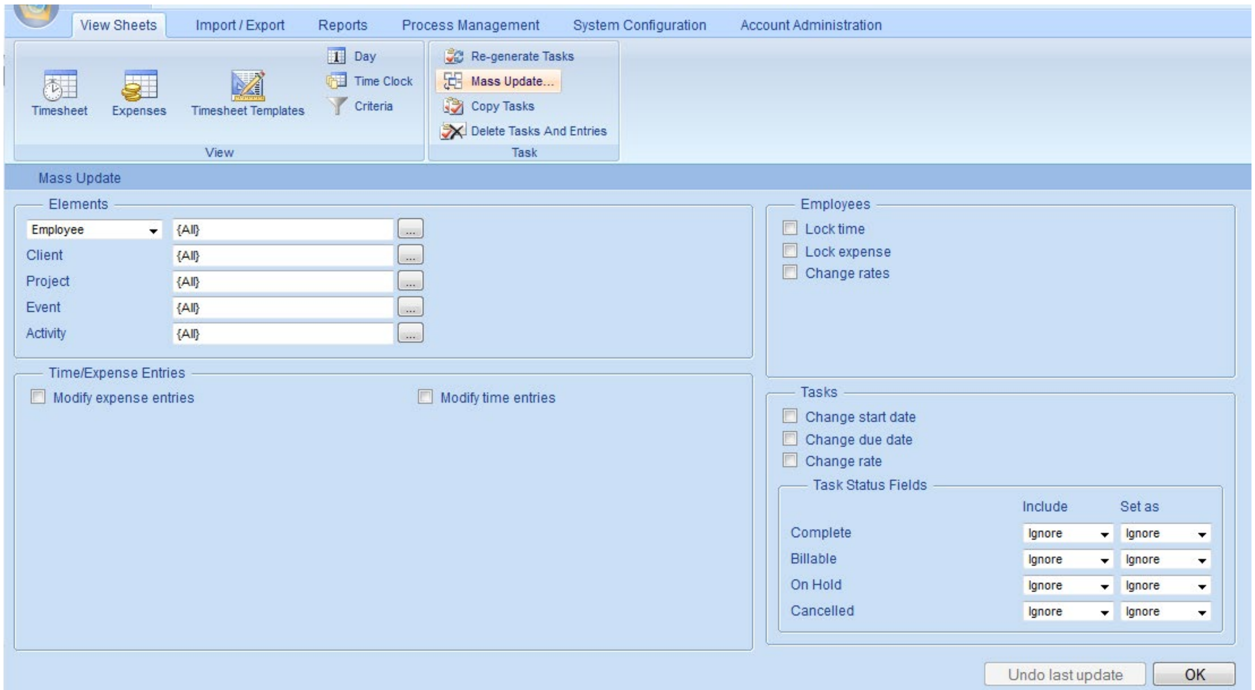
4. Make the required changes to the Expense entry.
5. Finally, do one of the following...

Do this...	To...
Click the **Save & Close** button	Save the changes to the Expense entry and return to the Expense sheet.
Click the **Cancel** button or the **Close** button on the top right corner of the **Expense Entry** 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.



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 **Elements** panel to specify the criteria for selecting the records that you want to update. Click on the various ... buttons and select values from the Select Element dialog box that appears. **Note:** The items in the **Elements** 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 ... in the **Employee** 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 ... button in the **Client** row) and the Project name (from the ... button in the **Project** row). Office Timesheets will update the values of only those records that match the criteria you set in the **Elements** panel.	
The Time/Expense Entries panel	Use the **Time/Expense Entries** panel to select whether to modify the status of time entries, expense entries or both. If you specify a range of dates (**From/To**), Office Timesheets will update only those entries that fall within the range of dates.	
Modify expense entries	Check the **Modify expense entries** check box if you want to modify the status of Expense entries. **NOTE:** 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.	Unchecked
Modify time entries	Check the **Modify time entries** check box if you want to modify the status of Time entries. **NOTE:** 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.	Unchecked
From	If you want to limit the update to a range of entries between two specific dates, specify the starting date in the **From** box, using the Date Picker. **NOTE:** The **From** 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 **From** date, Office Timesheets will update entries starting from the	Hidden from view

Item	How to use the Item	Default Value (if any)
	first entry.	
To	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.	Hidden from view
The Entry Status Fields panel	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
Include	For any Entry Status value you want to change, select the current value of the Entry Status Field from the drop-	

Item	How to use the Item	Default Value (if any)
	down list in the **Include** column. For example, to change the status of Overtime from “No” to “Yes”, in the Overtime row, select “Unchecked” in the Include 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.	
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. **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.	
The Employees panel	Use the **Employees** panel to lock time and/or expense entries, and change the rates for employees.	
Lock time	Check the **Lock time** 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. **NOTE:** The Date Picker will appear only after you check the **Lock time** check box.	Unchecked
Lock expense	Check the **Lock expense** 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. **NOTE:** The Date Picker will appear only after you check the **Lock expense** check box.	Unchecked
Change rates	Check the **Change rates** check box to change the standard or overtime rates for the employees. Select the rate item that you wish to change from the **drop-down list**. **NOTE:** The **drop-down list** and the **Rate**, **Start Date** and **End Date** items will appear only after you check **Change rates**.	Unchecked

Item	How to use the Item	Default Value (if any)
Rate	Type the new rate in the **Rate** box. **NOTE:** The **Rate** box becomes visible only after you have checked the **Change rates** check box.	Hidden from view
Start Date	In the **Start Date** box, use the Date Picker to specify the starting date for the rate change. **NOTE:** The **Start Date** box becomes visible only after you have selected the **Change rates** check box.	Hidden from view
End Date	Check the **End Date** check box to specify an ending date. Once you select the **End Date** check box, Office Timesheets will allow you to specify the ending date, using the Date Picker. **NOTE:** The **End Date** box becomes visible only after you have selected the **Change rates** check box.	Hidden from view
The Tasks Panel	Use the **Tasks** 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 **Change start date** check box to change the starting date of the tasks. Use the Date Picker to specify the new start date. **NOTE:** The Date Picker will appear only after you check **Change start date**.	Unchecked
Change due date	Check the **Change due date** check box to change the due date of the tasks. Use the Date Picker to specify the new start date. **NOTE:** The Date Picker will appear only after you check **Change due date**.	Unchecked
Change rate	Check the **Change rate** check box to change the rate for the tasks. Type the new rate in the Change rate box. **NOTE:** The **Change rate** box will appear only after you check the **Change rate** checkbox.	Unchecked
The Task Status Fields panel	The **Task Status Fields** panel displays the names of the various Task Status Fields. The panel contains two columns—**Include** and **Set as.** For every status field you	

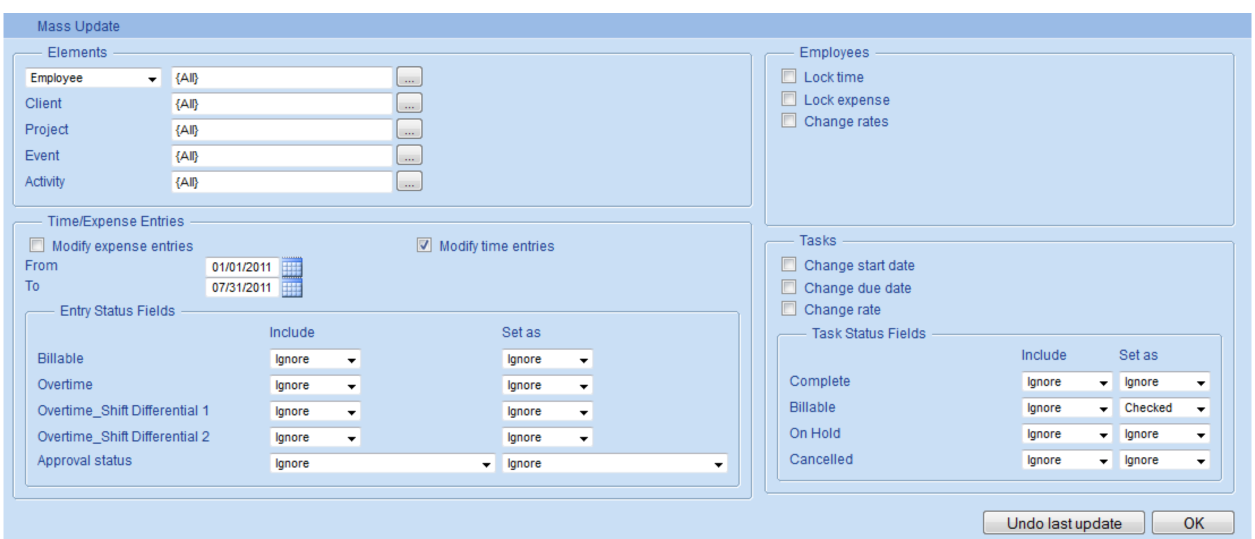
Item	How to use the Item	Default Value (if any)
	want to change, select a value in the **Include** column, and specify the new value in the **Set as** column. For example, to mark the tasks as 'Billable', in the **Billable** row, select “Unchecked” in the **Include** column and “Checked” in the **Set 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 mark a task as “Cancelled” irrespective of the current status of the tasks, select “Ignore” in the **Include** column of the **Cancelled** row, and “Checked” in the **Set as** column. **NOTE:** 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 **Include** column. For example, to change the status of Billable from “No” to “Yes”, in the **Billable** row, select “Unchecked” in the **Include** column. **NOTE:** 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 **Set as** column. For example, to change the status of Billable from “No” to “Yes”, in the **Billable** row, select “Checked” in the **Set as** column. **NOTE:** 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 **OK** 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)
	 **NOTE:** Office Timesheets displays this message whenever it completes the Mass Update process ***even if it has not found any records to update***. Therefore, after performing the update, always remember to check a couple of entries to verify that the update has taken place. **TIP:** Office Timesheets performs the update only after you click the **OK** button. Therefore, if you change your mind and do not want to update the entries, simply go to some other screen, without clicking the **OK** button.	

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.



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.

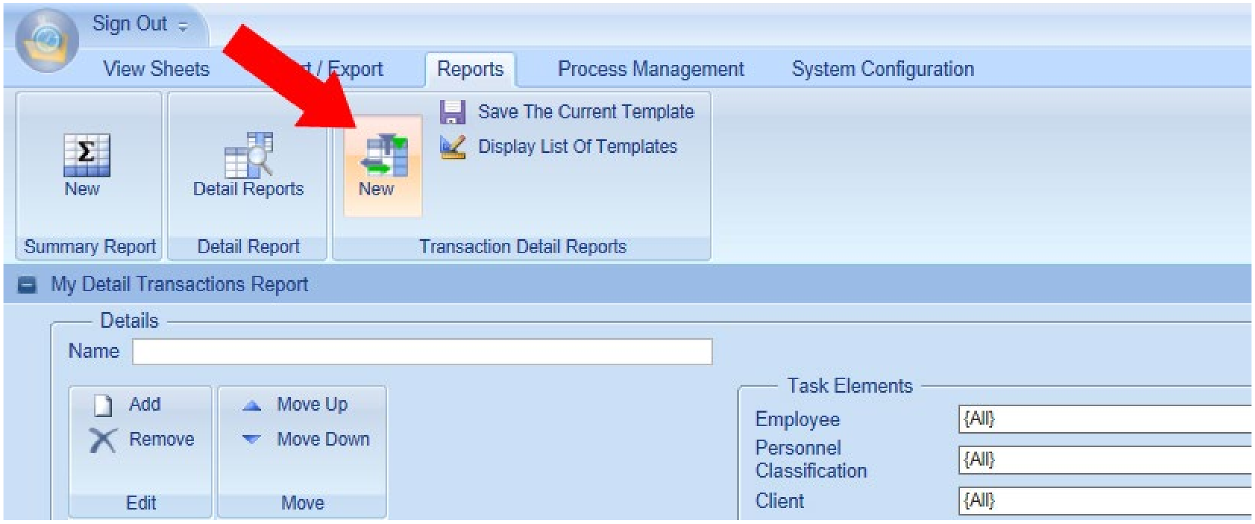
Office Timesheets Detail Reports incorporates the Microsoft® Reporting Services runtime whereby report templates can be created using Microsoft's SQL Server Reporting Services and then loaded and saved under a specified Detail Report Category within Office Timesheets.

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.

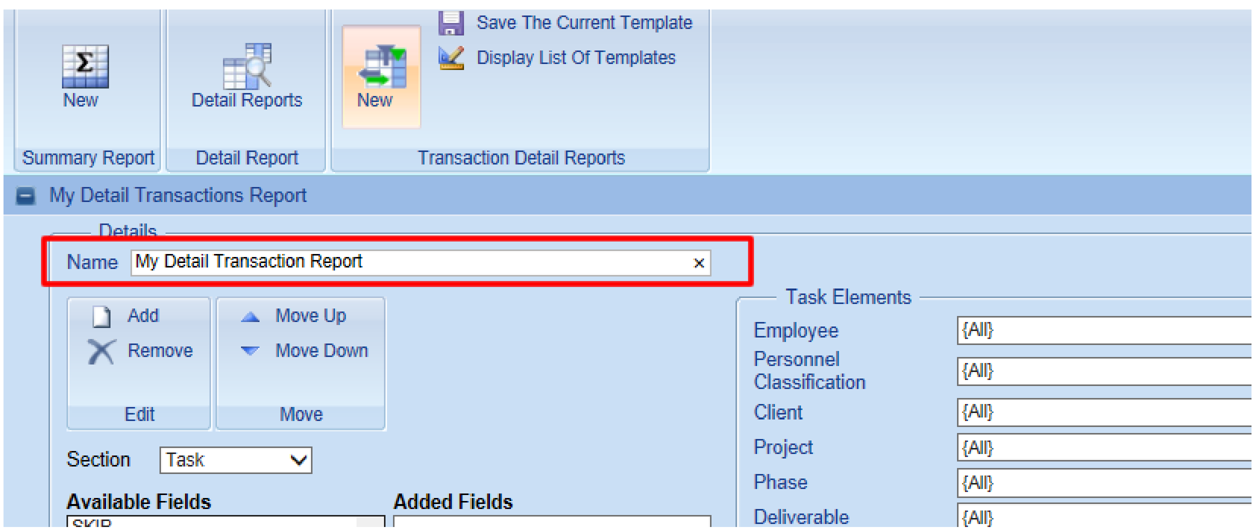
Transaction Detail Reports

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.

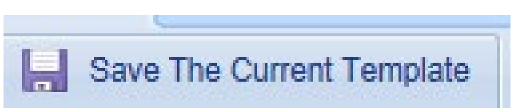
To create a new Transaction Detail Report click on the Reports tab; and then click the new icon on the Transaction Detail Reports icon group…



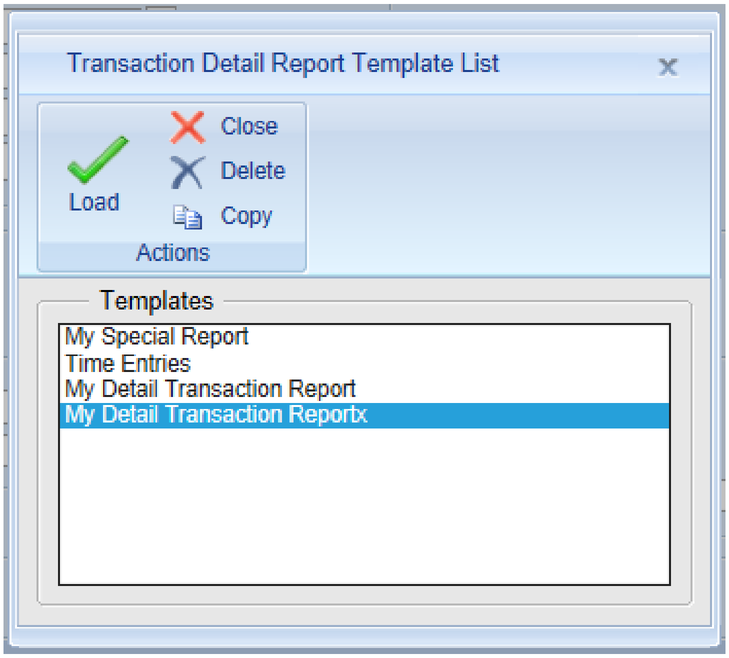
Transaction Detail Reports can be saved as templates and reused at a later time. Thus, it's best when starting to create a new Detail Transaction Report to give your report a name by typing the name into the **Name** field…



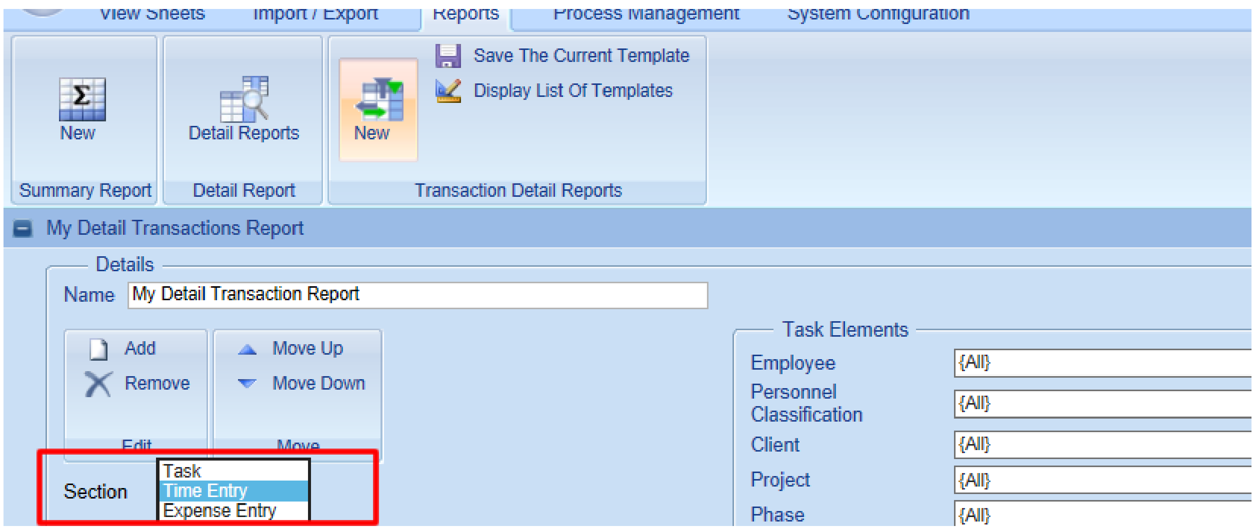
At any time you have made important changes to reports **Details** definition, press the **Save The Current Template** icon to save your work…



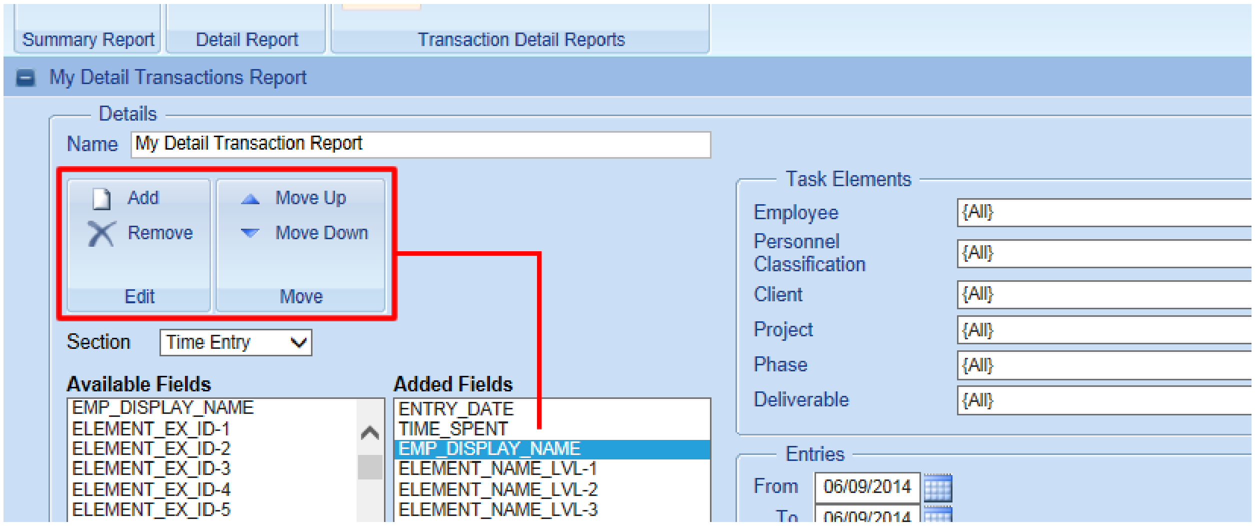
Any time you wish to recall your Transaction Detail Report click on the **Display List of Templates** icon in the **Transaction Detail Reports** icon group, select the report name, and then press the **Load** icon to recall your report template.



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**…



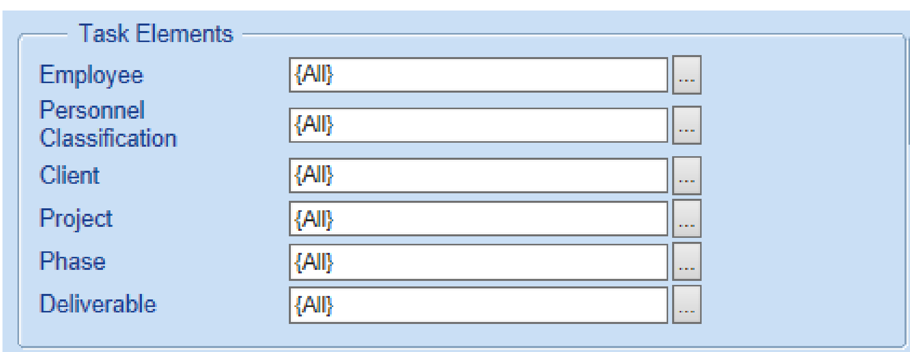
Once you've chosen the type of transactions you'd like to load into your report grid, next choose which fields you wish to display in your report grid, and the order in which you wish to display them. In the example below we have chosen Time Entry transaction and are showing the Entry Date, Time Spent, the Employee's Display Name, and element levels 1-3…

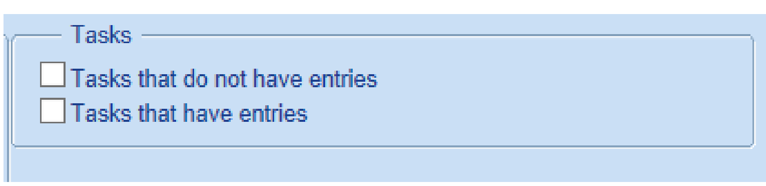


NOTE: The Transaction Detail Report field is comprehensive, and includes practically every field linked to task, time entry and expense entry transactions. A key is included that lists all fields available for selection along with a brief description of each field.

Task Filtering Options

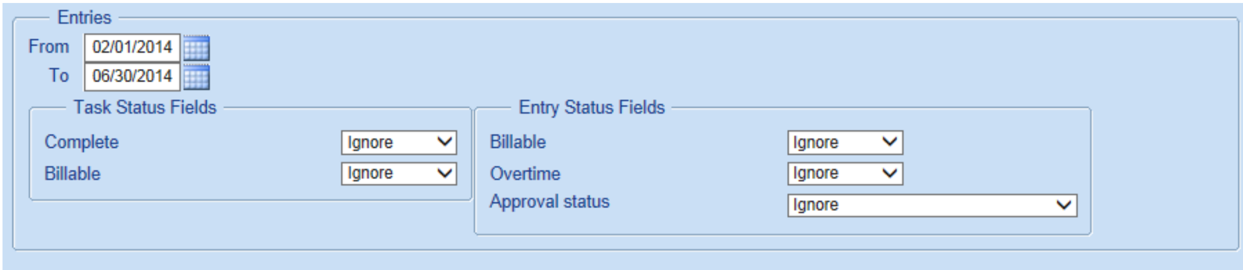
You can filter your Detail Transaction Report by Task Element item and group selections; and whether or not you wish to show task that do not have time entries are only show tasks that do have time entries within the selected date range of the report…



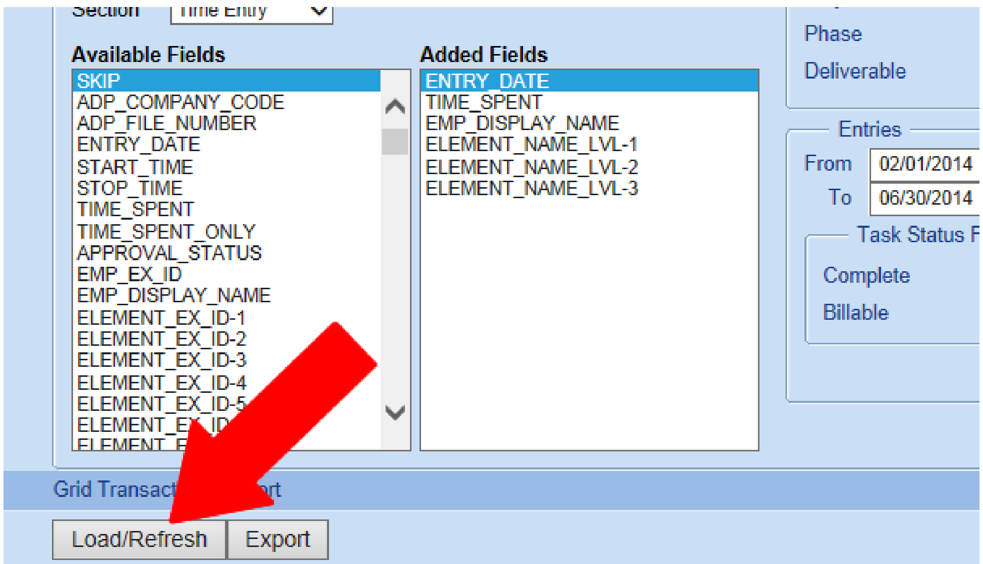


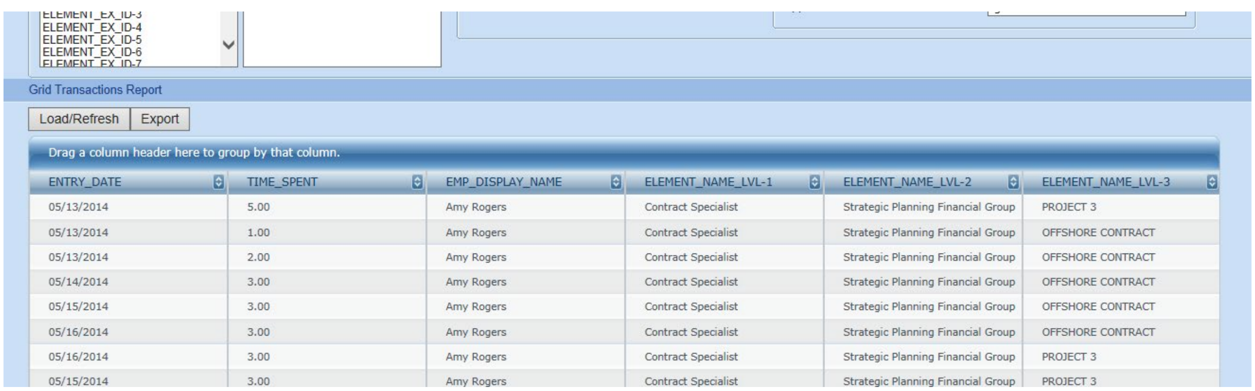
Entry Filtering Options

You can also filter your Detail Transaction Report by Date (From and To), Task Status fields and Entry Status fields…



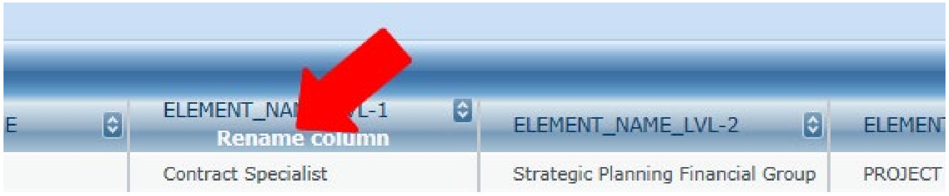
Once you have chosen your filter options simply press the Load/Refresh button to load the transactions into the grid. You would also press this button if you've previously load transactions into the grid, but have changed the filtering options, and you want the transactions in the grid to be updated with your new settings…



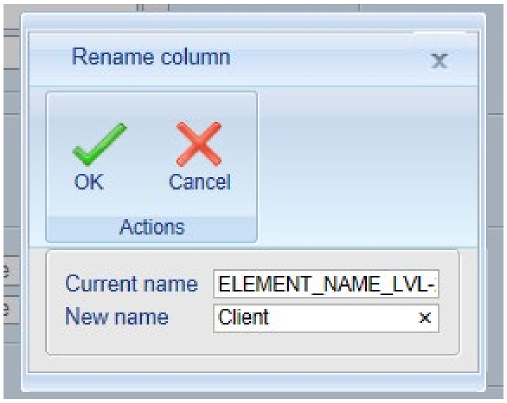


ENTRY_DATE	TIME_SPENT	EMP_DISPLAY_NAME	ELEMENT_NAME_LVL-1	ELEMENT_NAME_LVL-2	ELEMENT_NAME_LVL-3
05/13/2014	5.00	Amy Rogers	Contract Specialist	Strategic Planning Financial Group	PROJECT 3
05/13/2014	1.00	Amy Rogers	Contract Specialist	Strategic Planning Financial Group	OFFSHORE CONTRACT
05/13/2014	2.00	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…



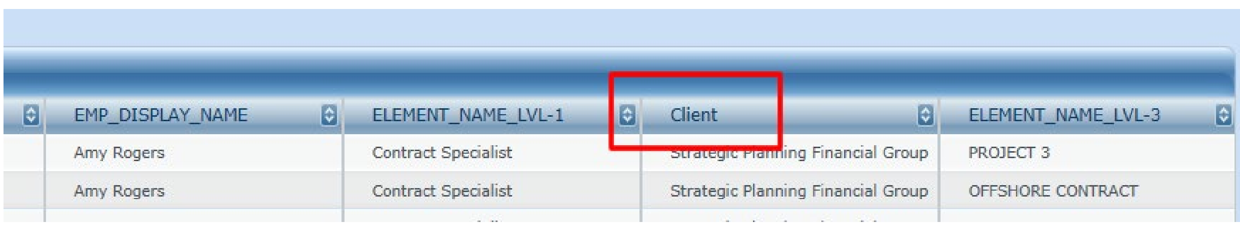
Type in the name into the New name column, and press the OK icon…



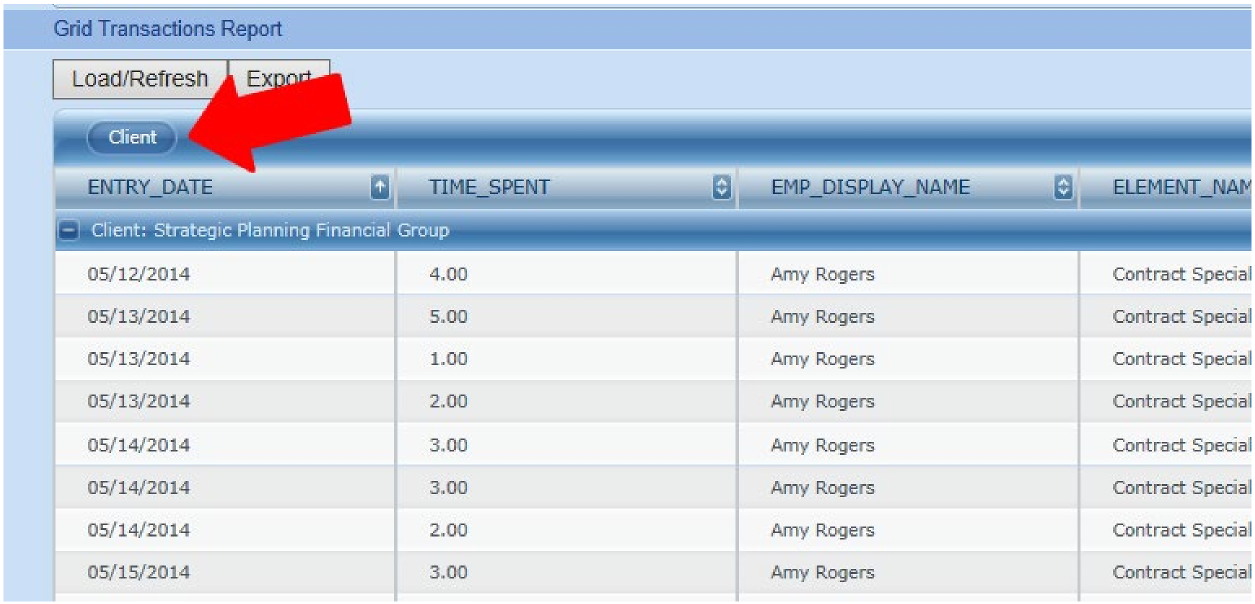
The column will now appear with your new column heading name.

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…

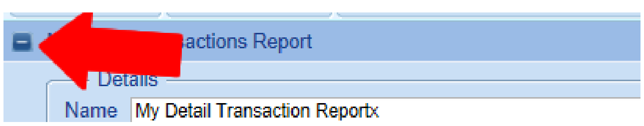


To group your transactions, hover your mouse above a selected column's header name, while holding down your left mouse key, drag the column heading into the blue space above the column heading row and release the mouse the button…



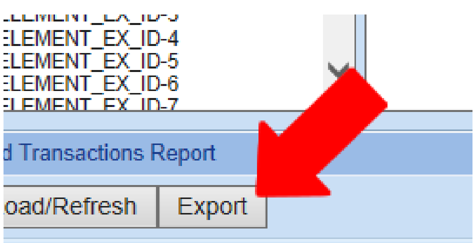
At the bottom of the grid panel are several additional controls. The first is a preference settings that allow you set the number of records you'd like to display per page loaded grid page; the other controls allow you to toggle from page to page, assuming there is more than one page worth of data loaded into grid report.

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
MI	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_CUSTOM-1	Level 10 Custom Field 1
Repeats for LVL10_ELM_CUSTOM-2-10	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.

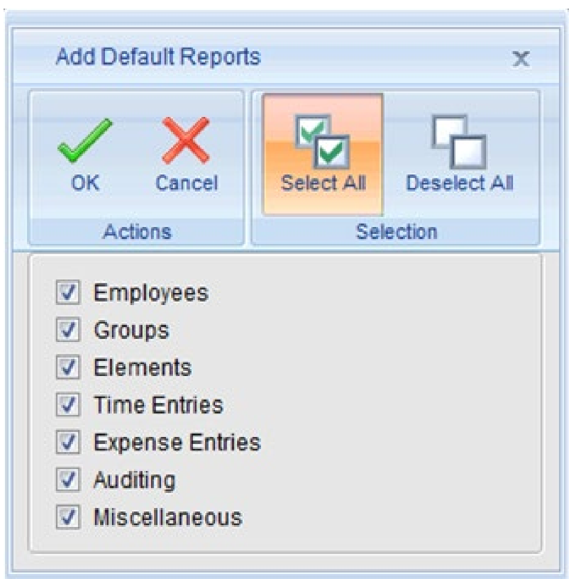
Using Office Timesheets Detail Reports

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.

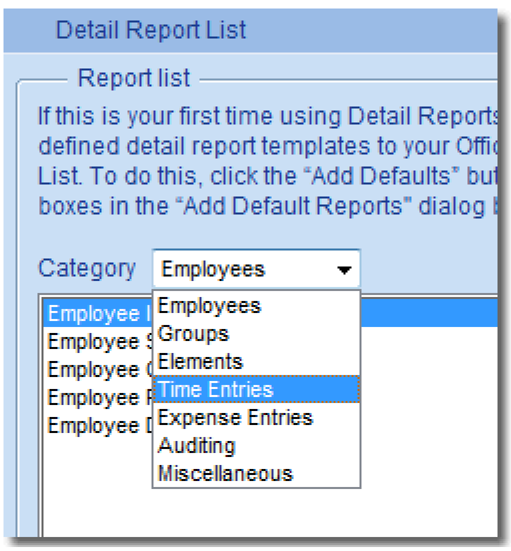
Add default report templates shipped with Office Timesheets should now be visible within the Detail Reports List.

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

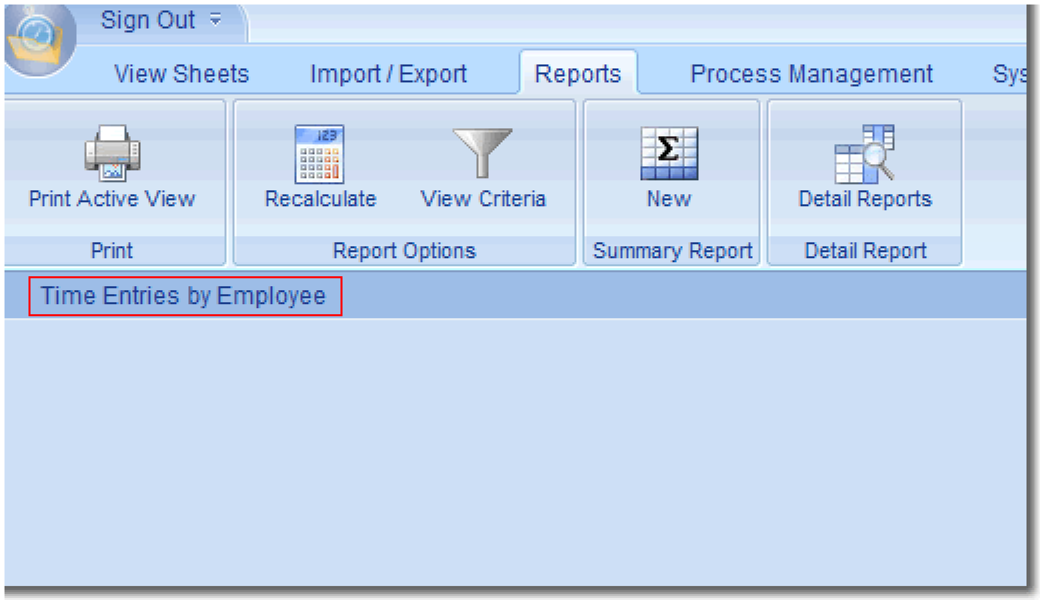
To see reports listed in a particular category, simply click on the **Category** drop down field; and then select the category of reports in which you wish to view…



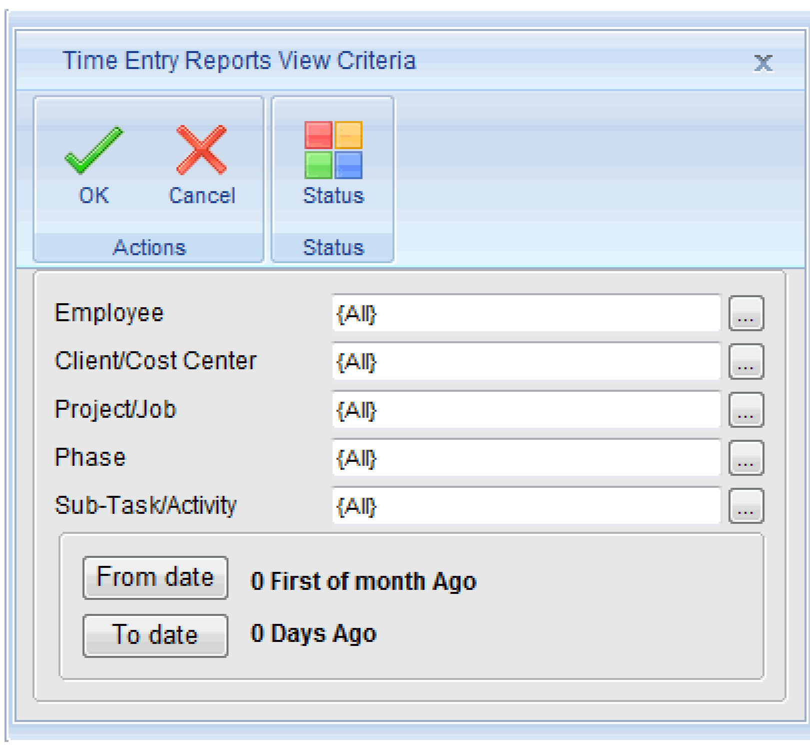
Loading & Setting the Reports View Criteria

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).



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…

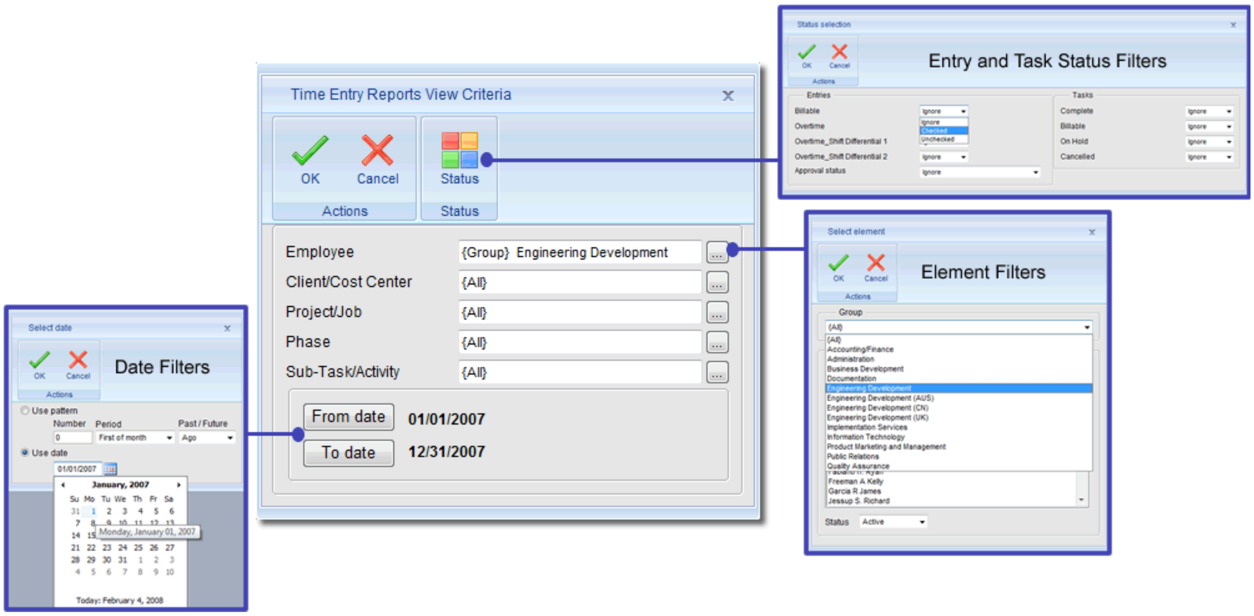


The Reports View Criteria allows you to filter reports based on:

- Time Entries Statuses
- Task Statuses
- Element Level Items

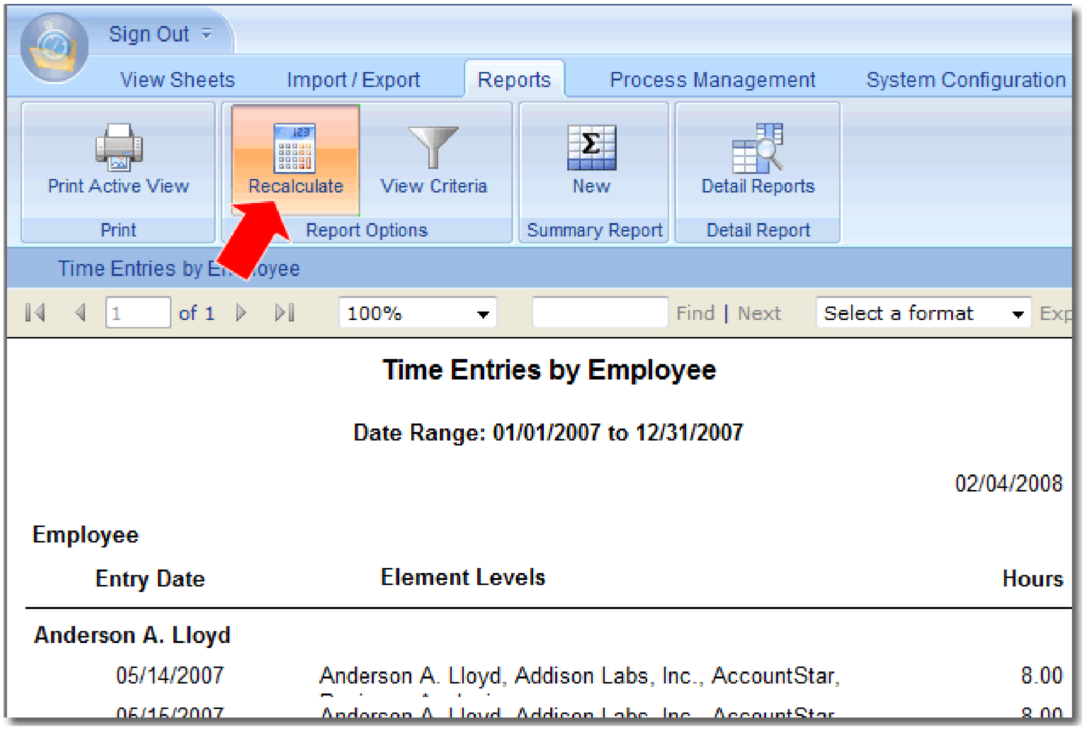
- Elements Level Groups
- From date
- To date

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

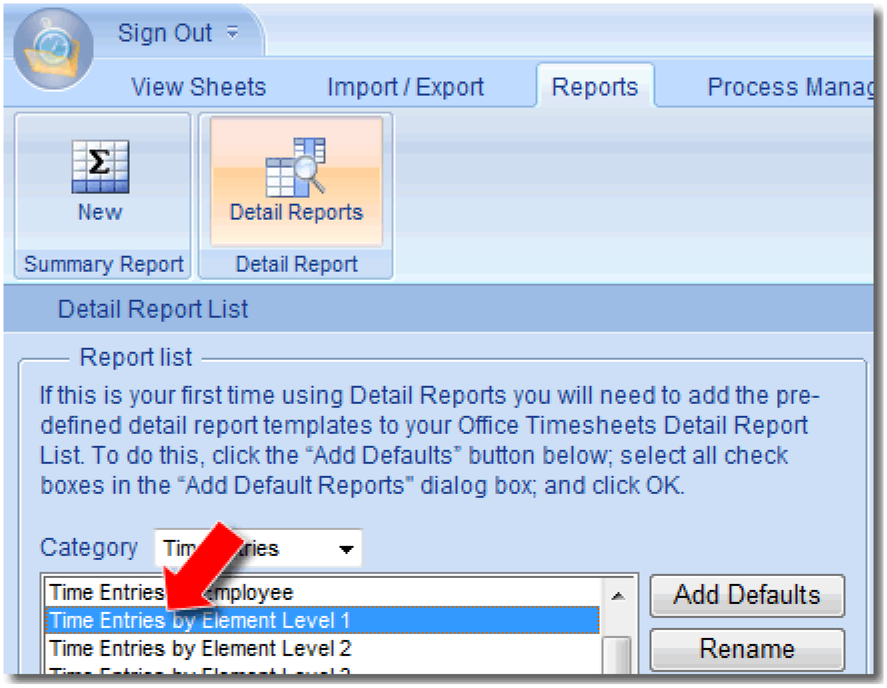
Once you set the desired view criteria for a specified report simply click on the Recalculate button in the Report Options ribbon group to generate your report…



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.

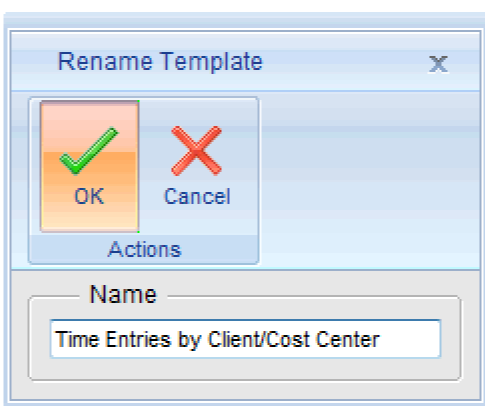
Renaming Detail Reports

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…



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.**



Adding Detail Reports

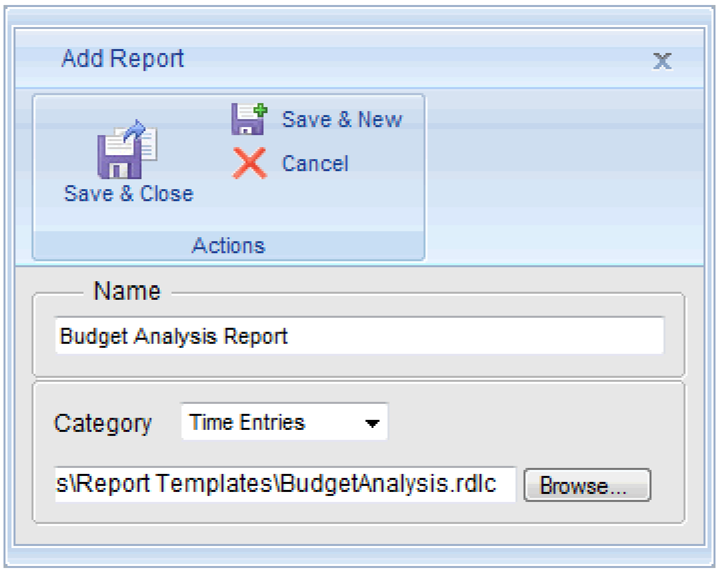
Once you have created a detail report template using Microsoft Reporting Services, it can then be added into the Office Timesheets detail report list.

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.

3. 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).

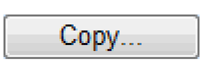


Copying Detail Reports

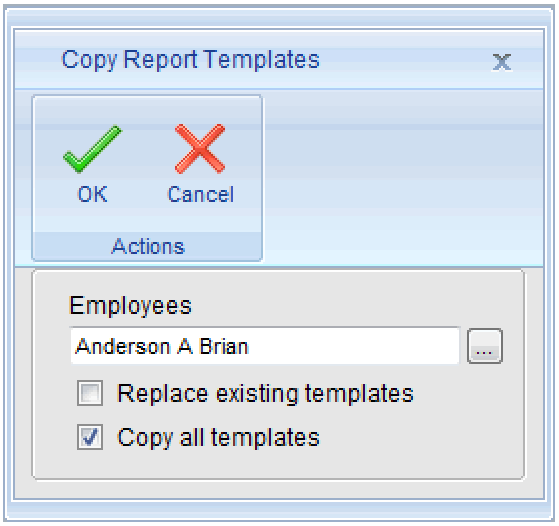
Once you added additional Detail Report templates into Office Timesheets, you can copy the template to other users within Office Timesheets.

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**.



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 http://msdn2.microsoft.com/en-us/library/ms170246.aspx.

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 sales@officetimesheets.com 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®.

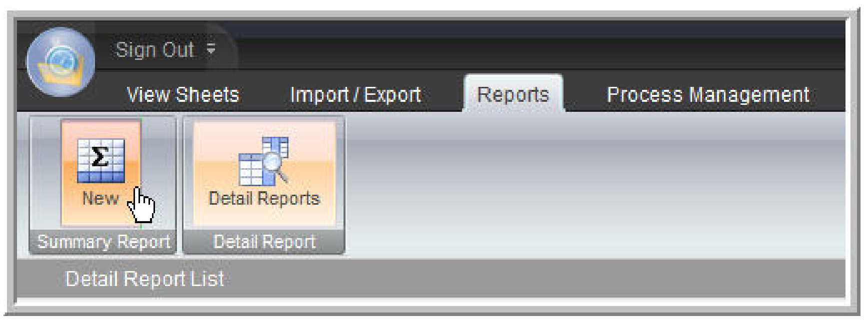
As the name implies, Summary Report are great for summarizing timesheet and task data held within the Office Timesheets database. Common uses for summary reports include comparing actual time spent vs. time budgeted for projects and/or tasks; employee costs vs. employee overhead by project, task and/or client; etc.

Creating a Summary Report

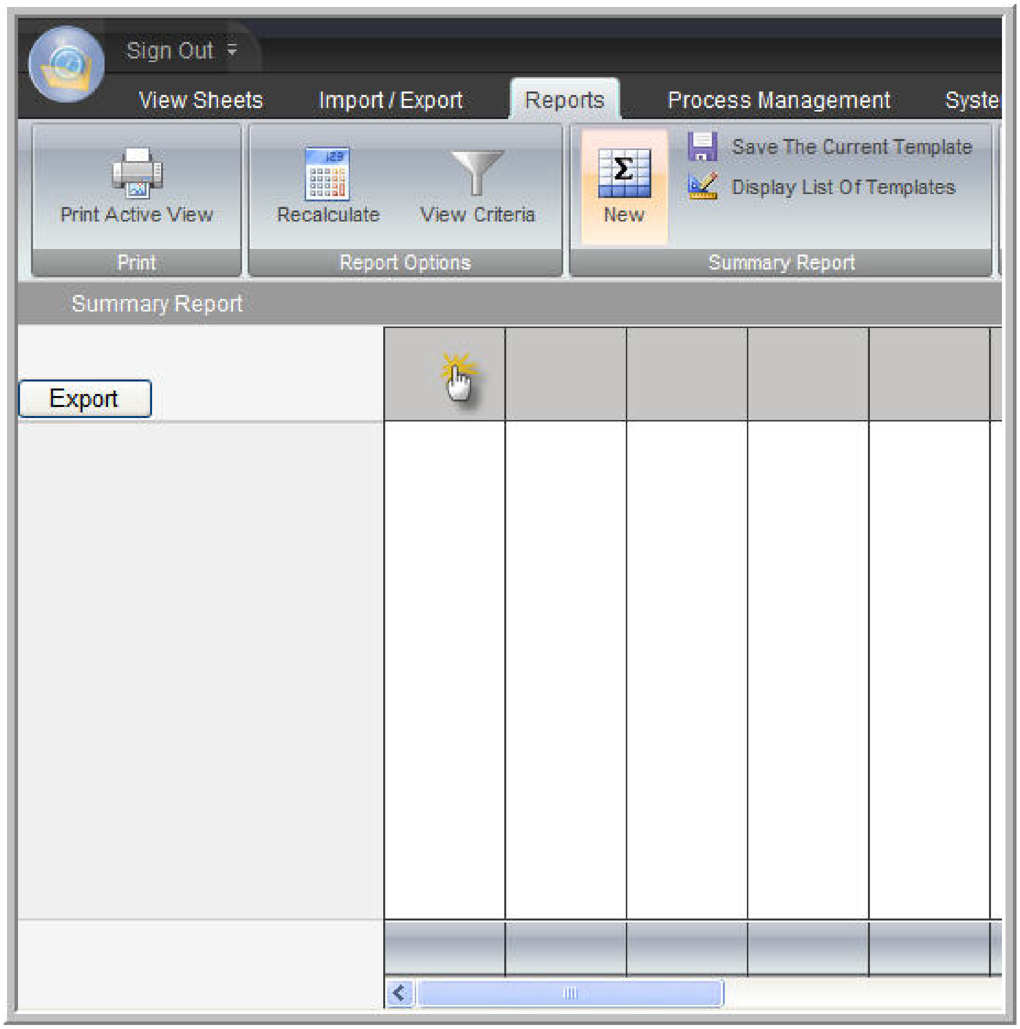
Summary Reports are both quick and easy to create. To create a summary report:

1. Click on the "Reports" tab.

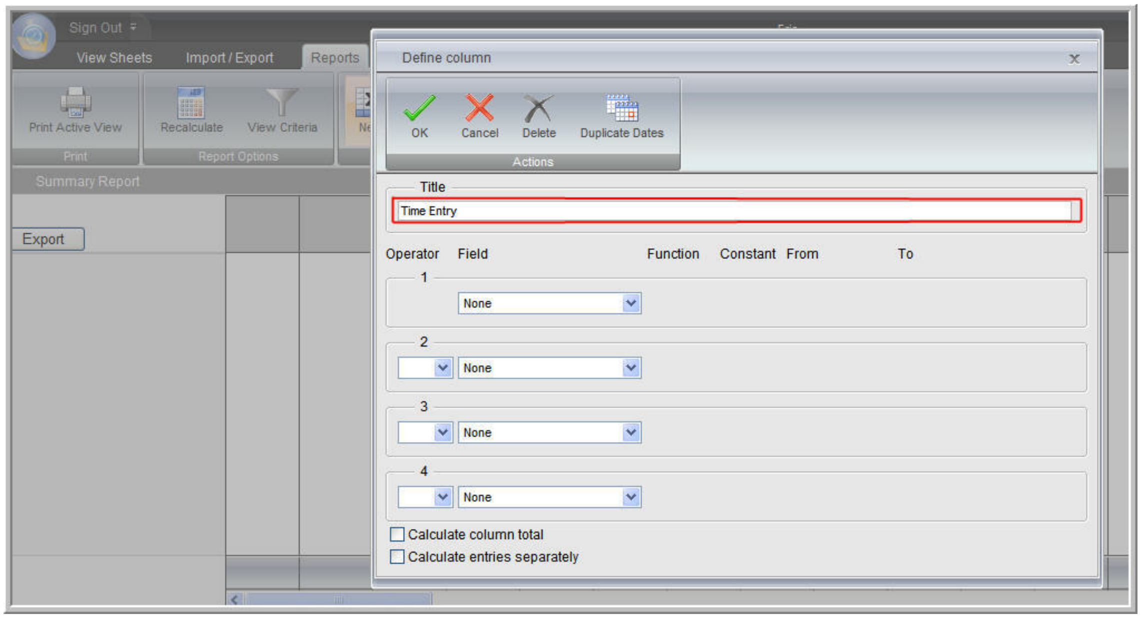
2. Click on the "New" button within the "Summary Report" ribbon group.



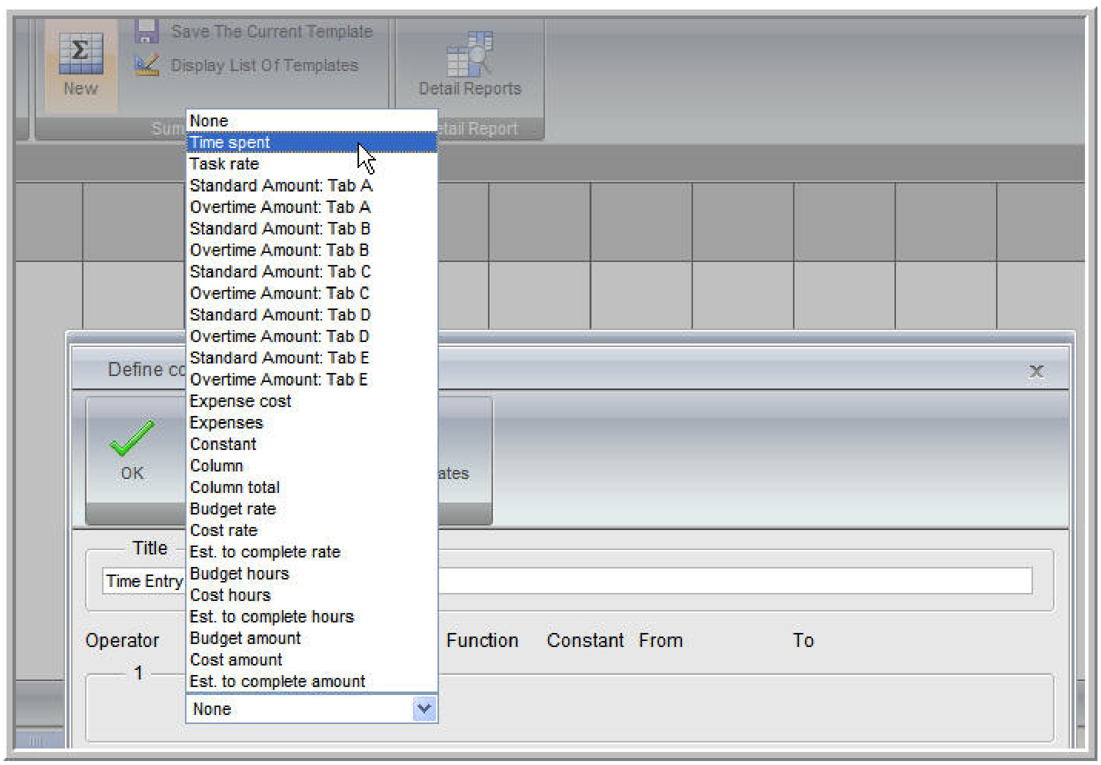
3. On the first column located on the far left side double click on the blank field above the column to open the "Define Column" dialog box.



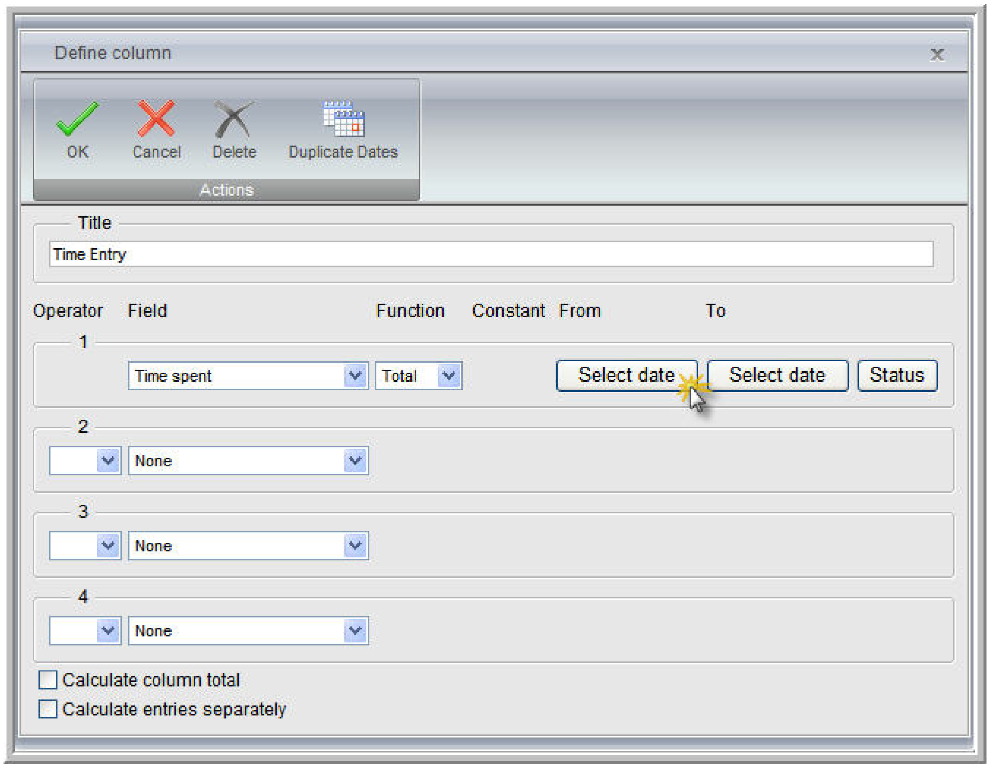
4. Enter in a title for the first column. This name will appear within what used to be the blank field above the column in step 3.

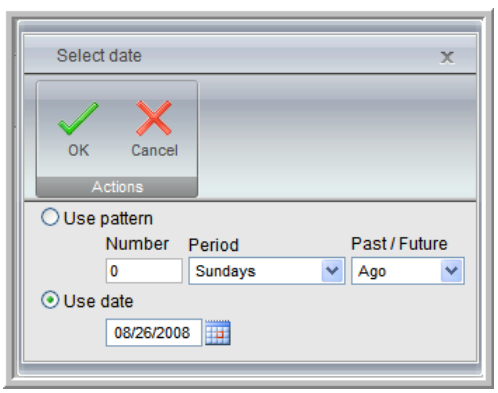


5. Choose the desired "Field" and "Function" from the drop down menu.

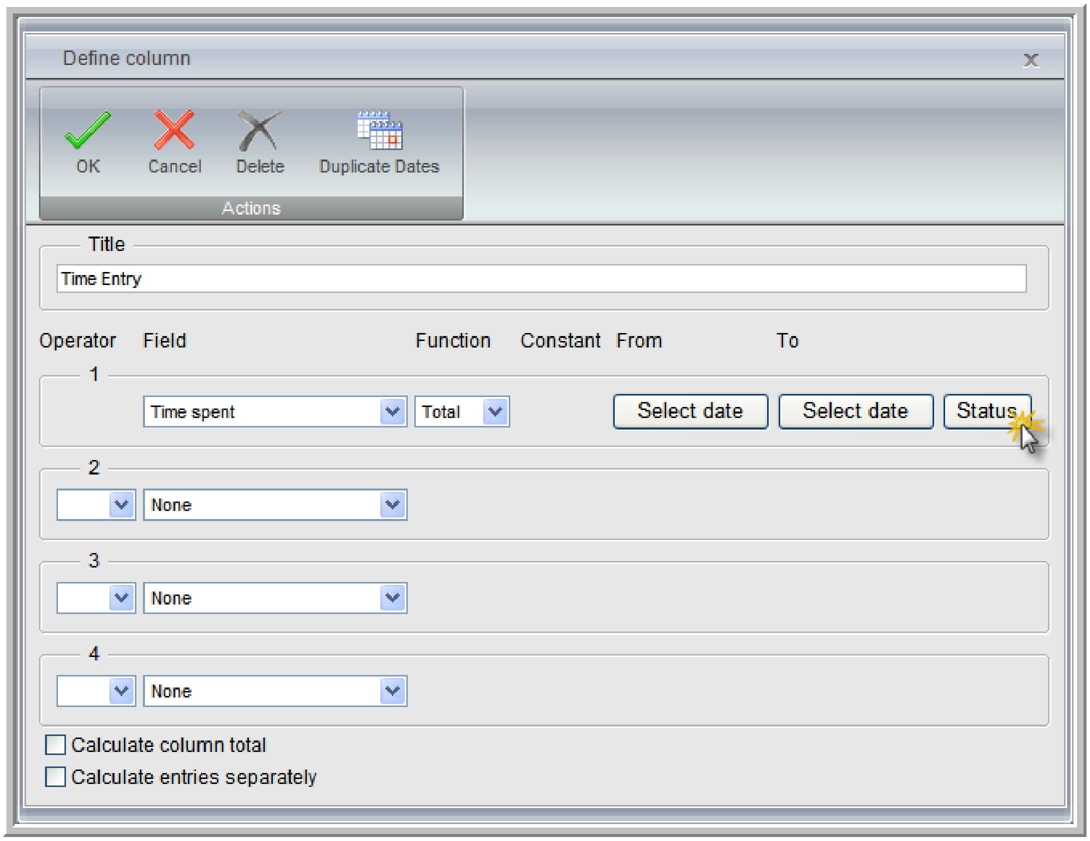


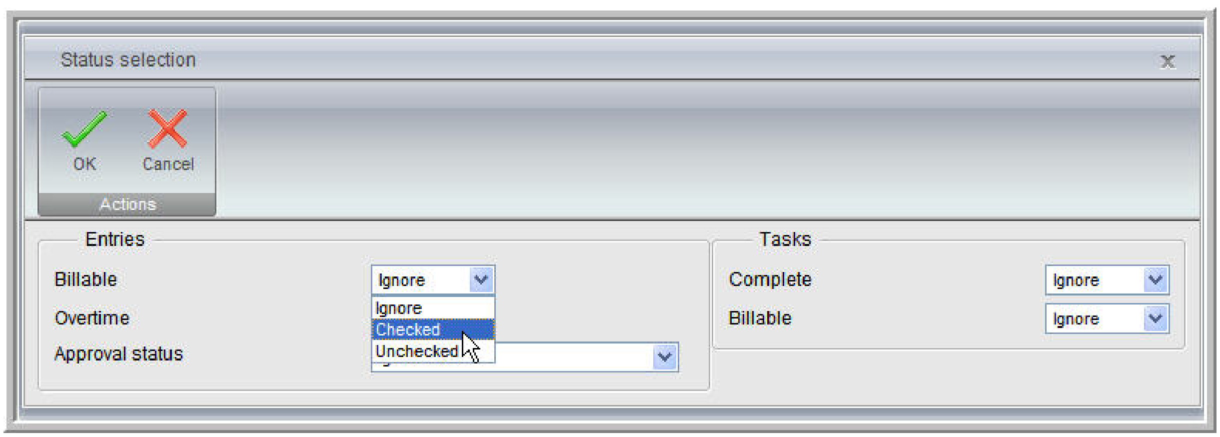
6. Choose the corresponding "From" and "To" dates by selecting the "Select dates" button.



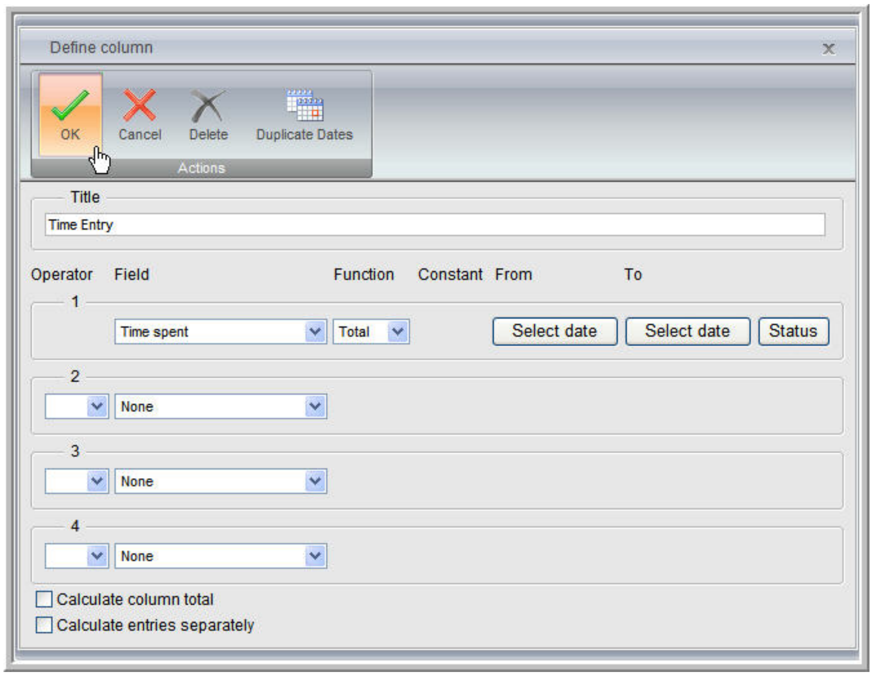


7. To further filter your selection click on the "Status" button and choose the corresponding "Entries" and or "Tasks" statuses.

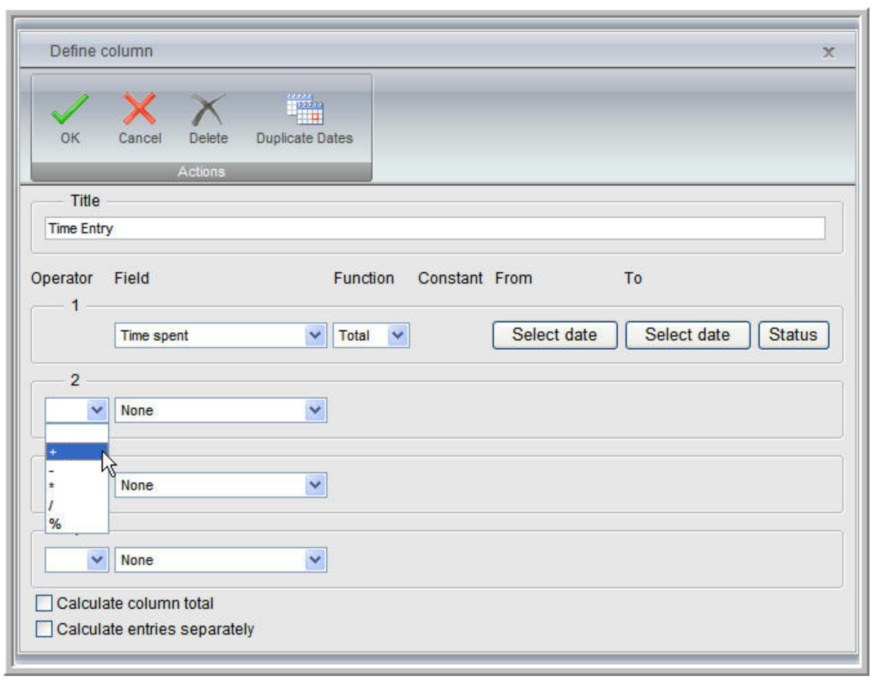




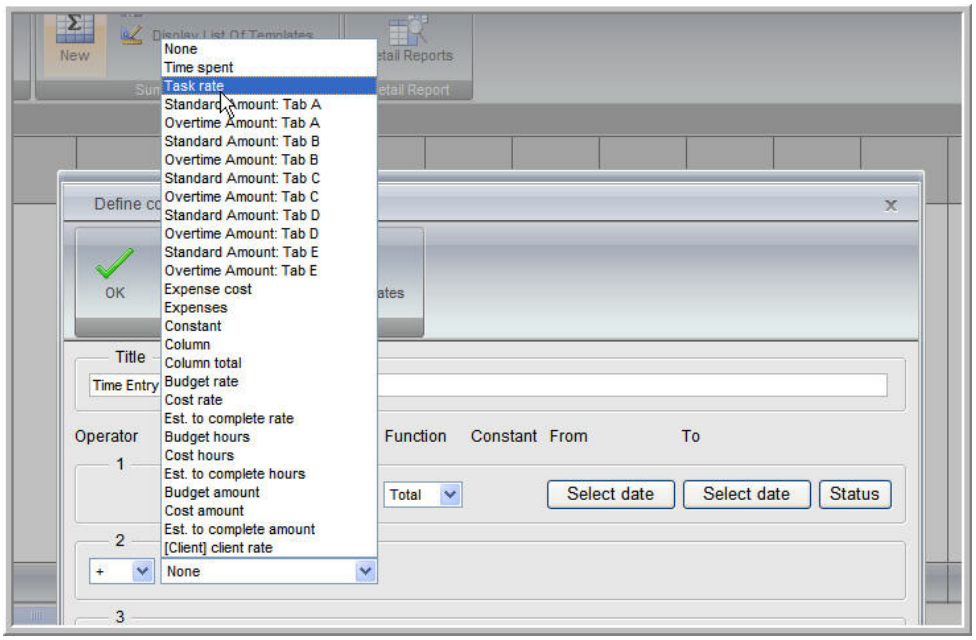
8. If this column requires only one dedicated field click on the **OK** button to save the settings and skip to step 10.



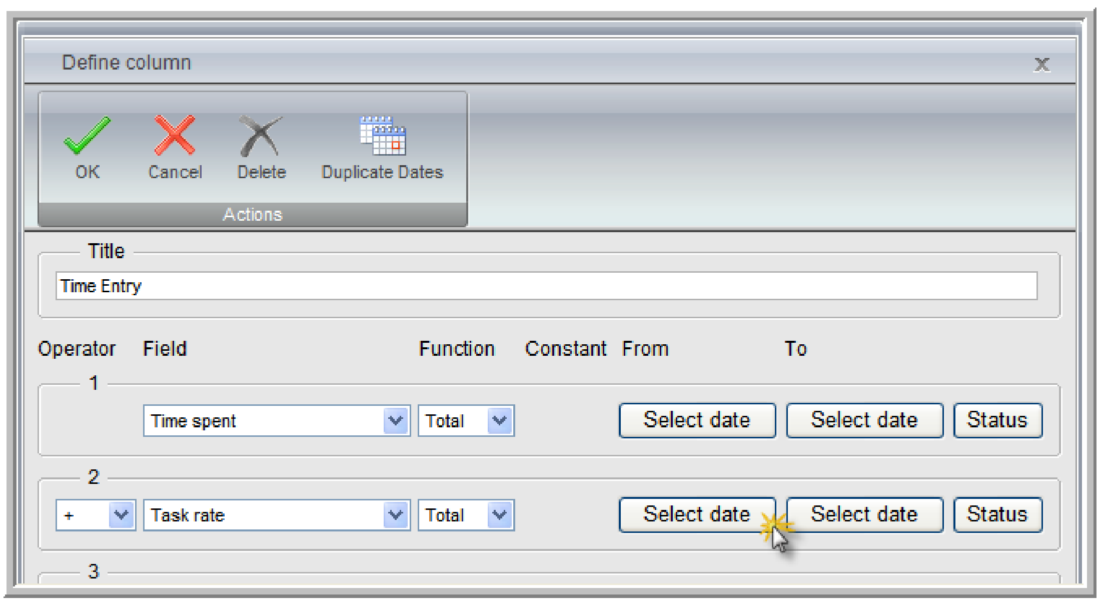
a. If this column requires more than one field then select the appropriate binary operator from the drop down menu (+ - * / %).



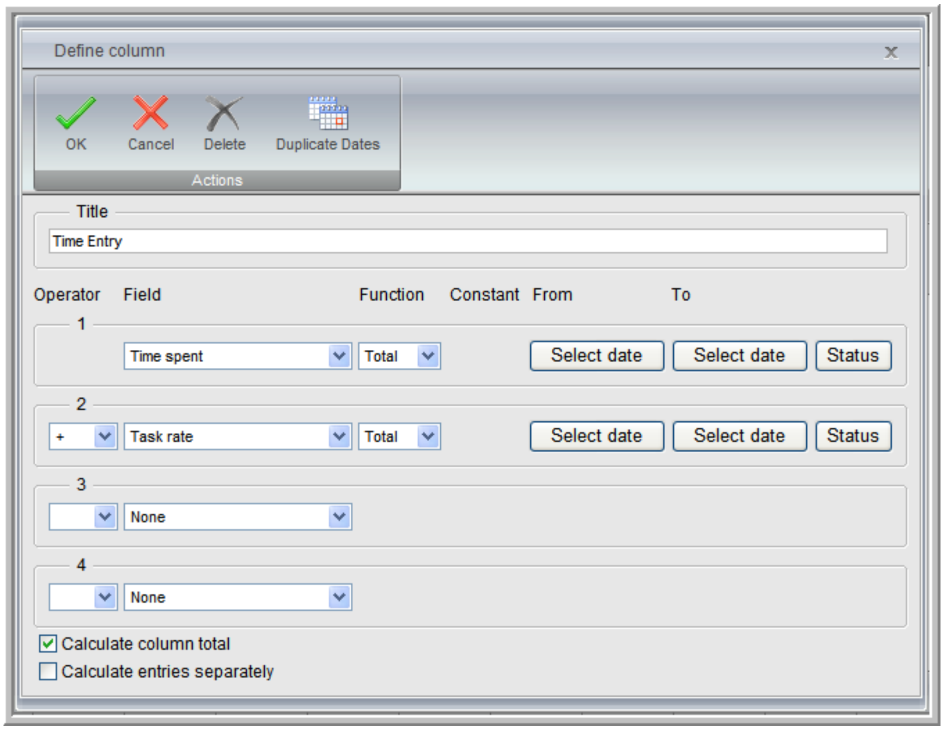
b. Again choose the desired "Field" and "Function" from the drop down menu.



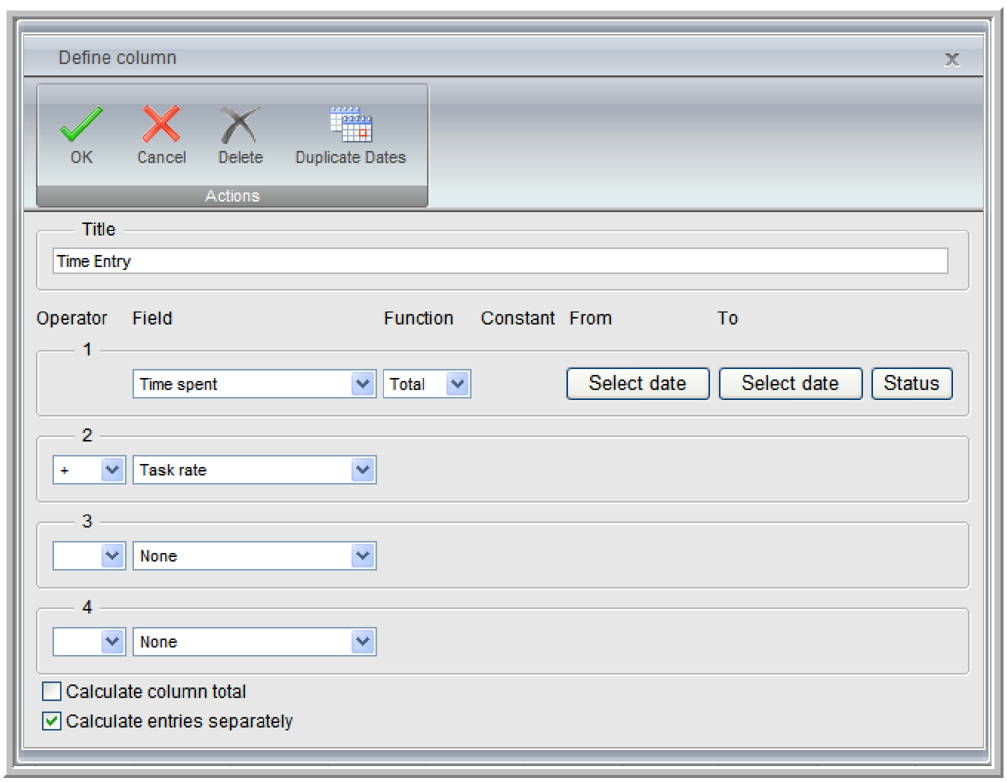
c. Choose the corresponding "From" and "To" dates by selecting the "Select dates" button. When finished click on the **OK** button to save the settings and continue with step 10.



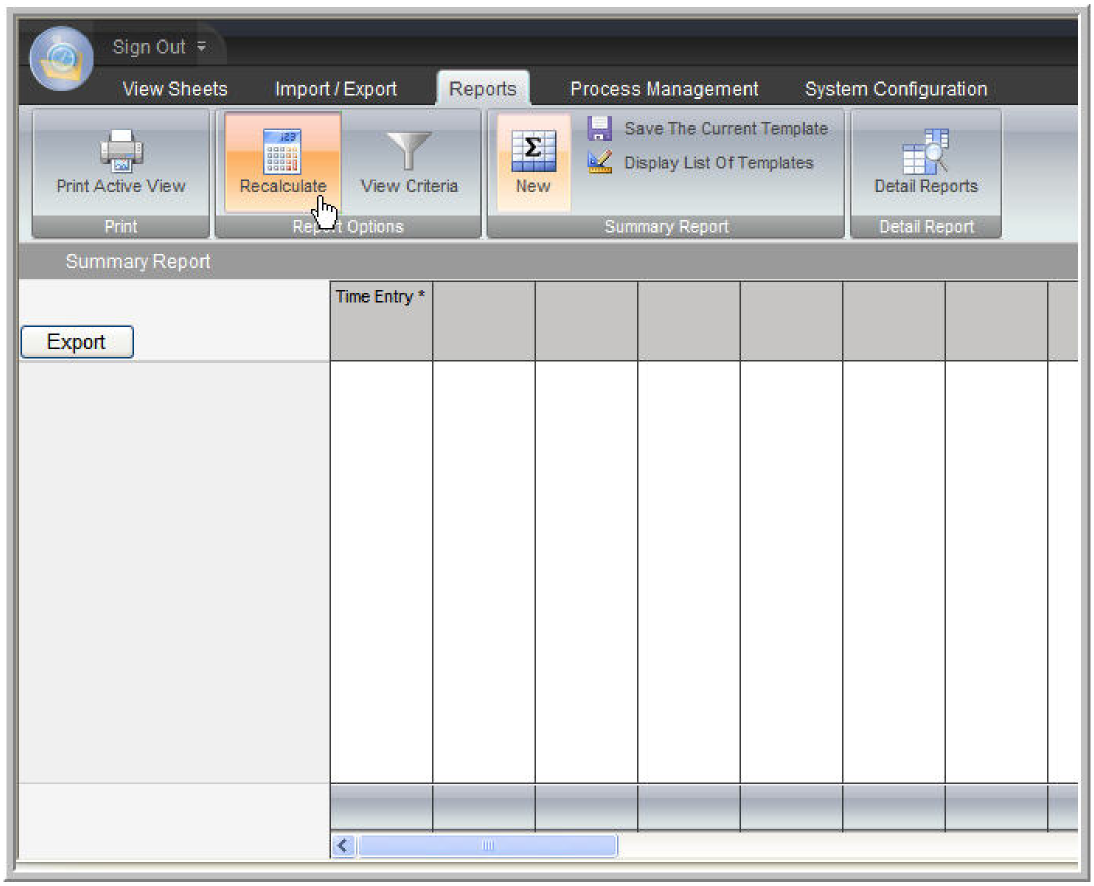
d. Check box option: "Calculate column total" - Determines if Office Timesheets displays the column total at the bottom of the column.



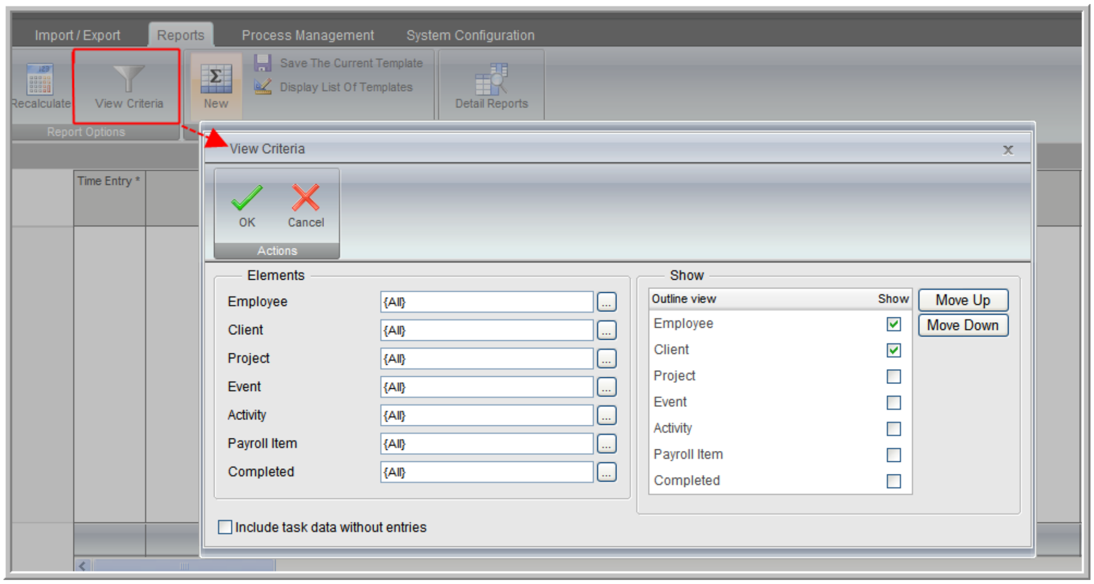
e. Check box option: "Calculate entries separately" - Mark this check box to change the calculation method for the column. With this method, Office Timesheets will apply each operator to each entry separately, rather than scanning all entries for the first field. Function and date selection items are not viewable for "Field" 2-4.



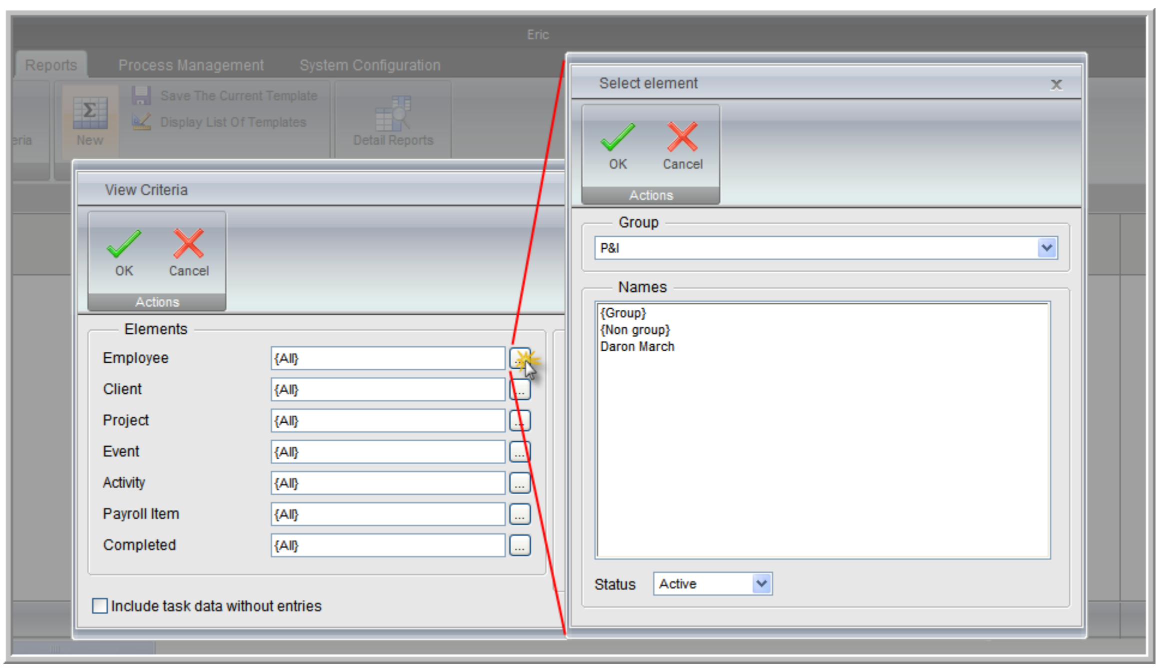
10. To test your current configuration click on the "Recalculate" button and the Summary Report will generate and display your column's calculations.



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.



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".



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.

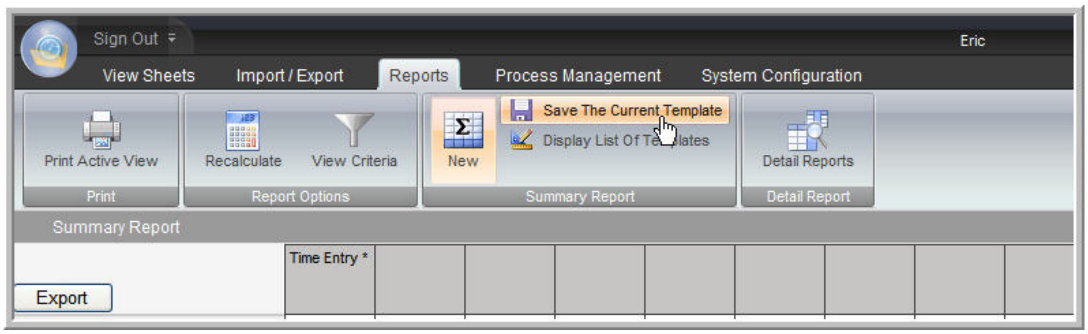
c. There are several "Select element" dialog boxes which contains the "Show as" option. Choosing the "Name" options displays the full name of the element whereas the "Abbreviations" will display all names in an abbreviated form.

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.

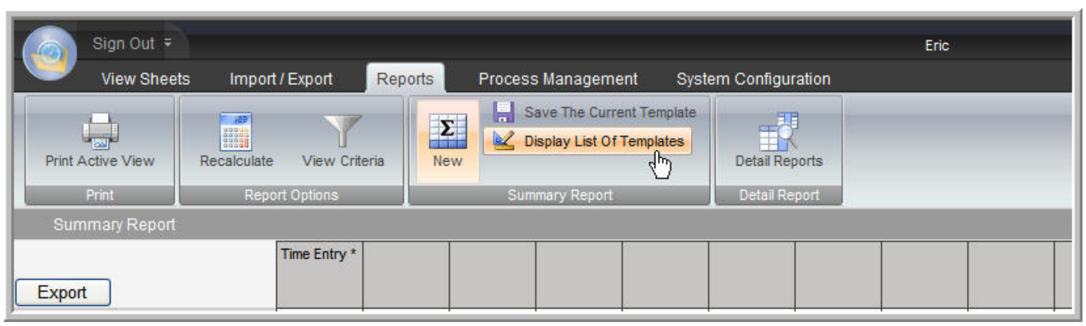
12. Save your report.

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.

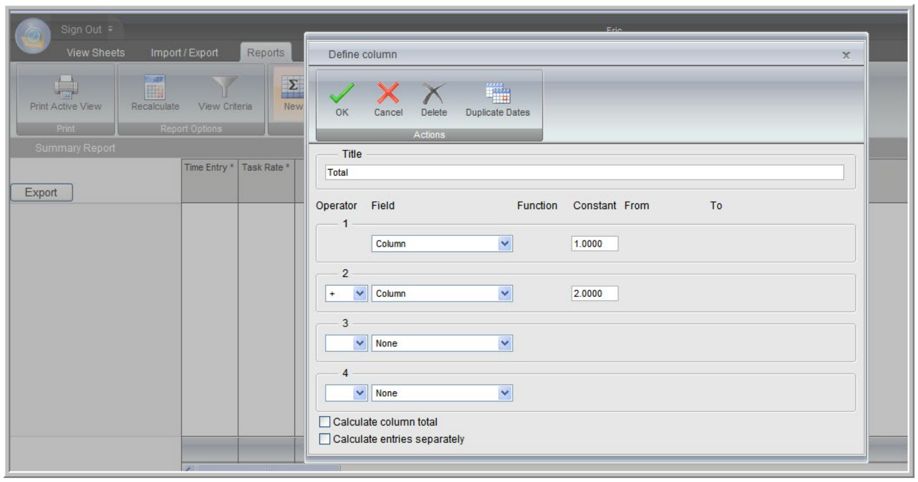
NOTE: If a second column is needed simply double click on the blank field above the column to open the "Define Column" dialog box.



b. To retrieve your report template choose the "Display List of Templates" button and select your template.



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.

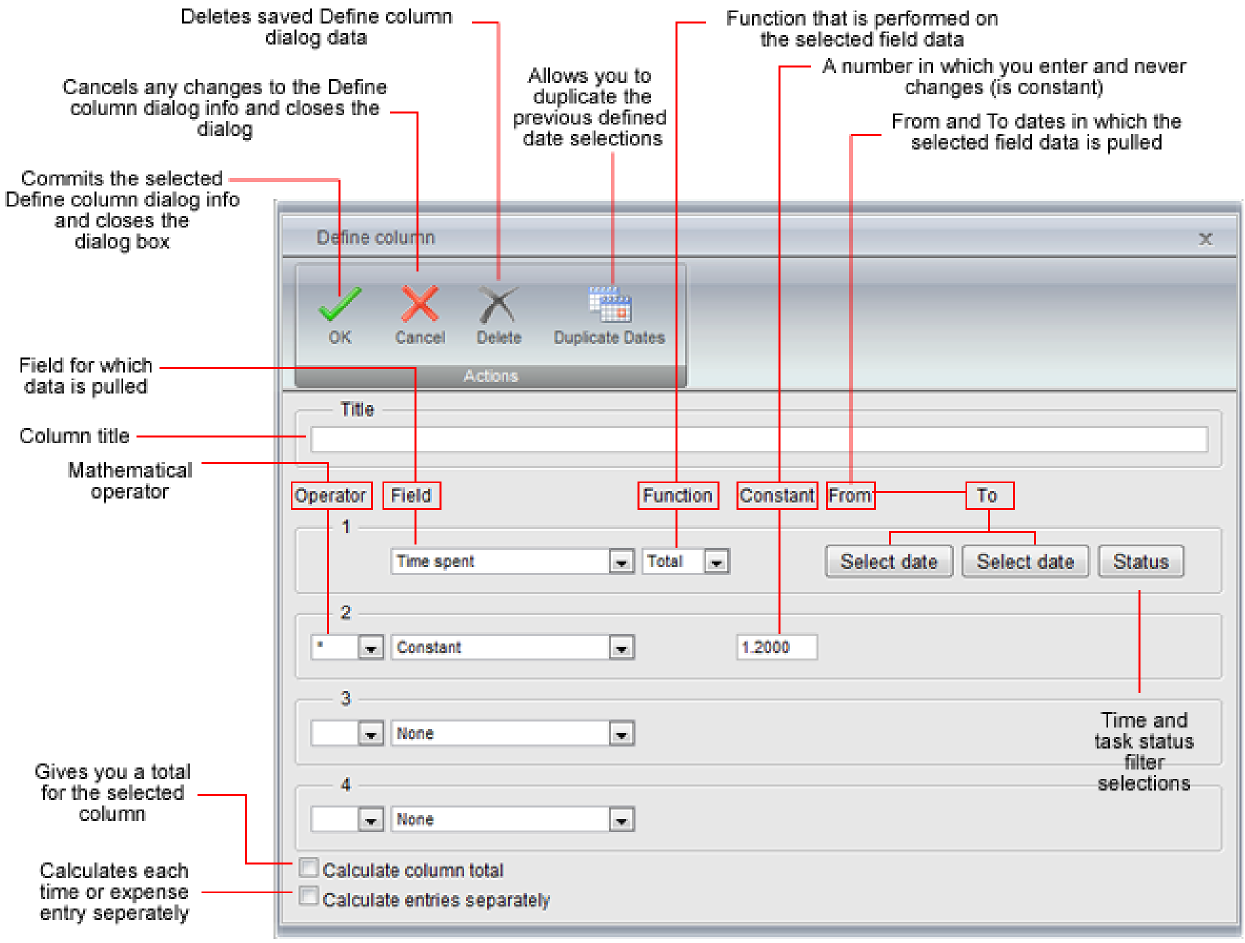


14. Choose the "Recalculate" button to generate the new amounts for each column.

    Please note: the "Standard Amount: Tab" is the Product of "Time Spent" * "The rate of the specified tab"

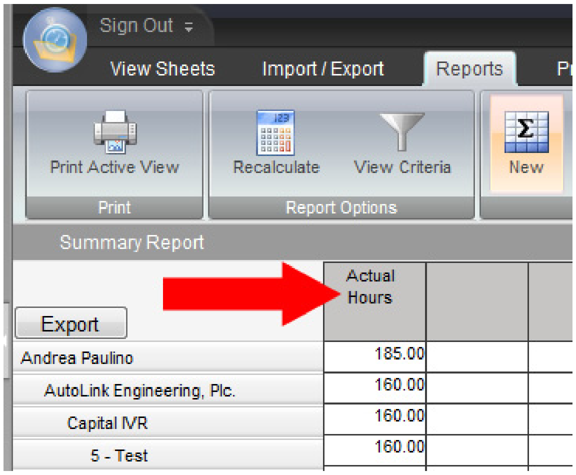
The Define Column Dialog in Detail

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…



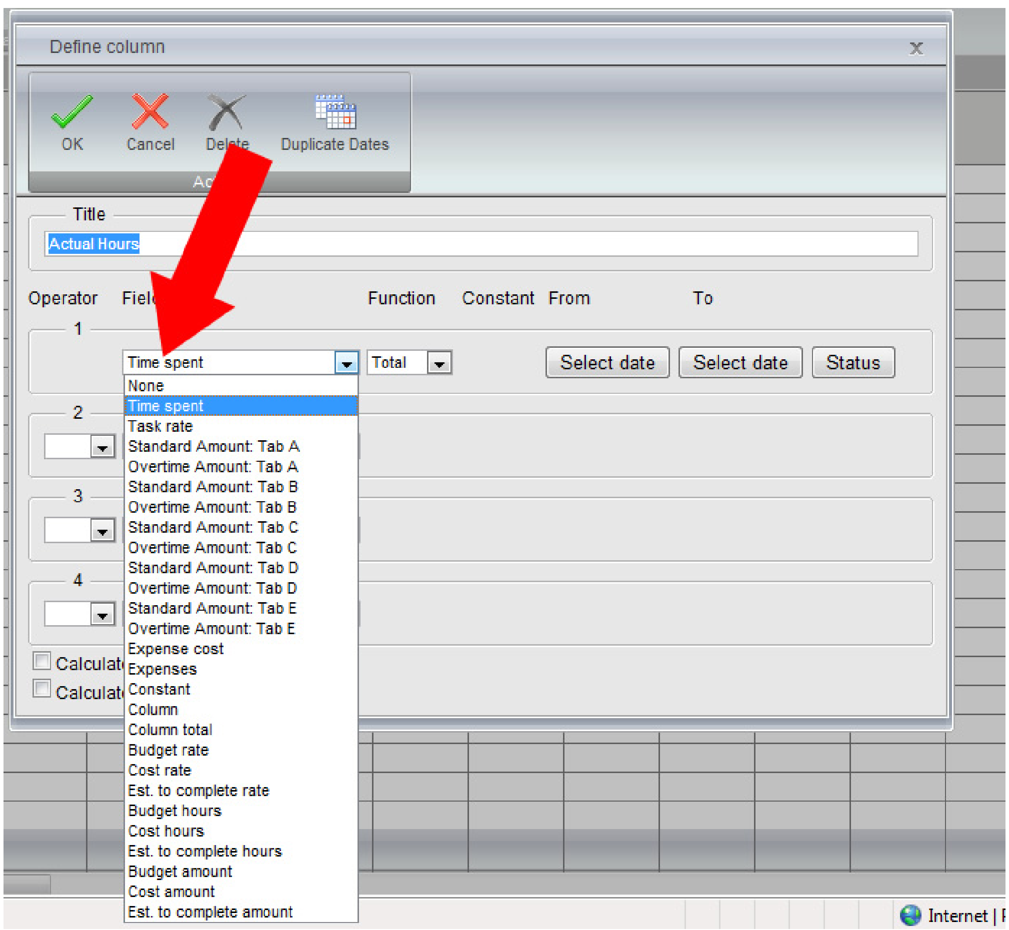
Column Title field

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**.

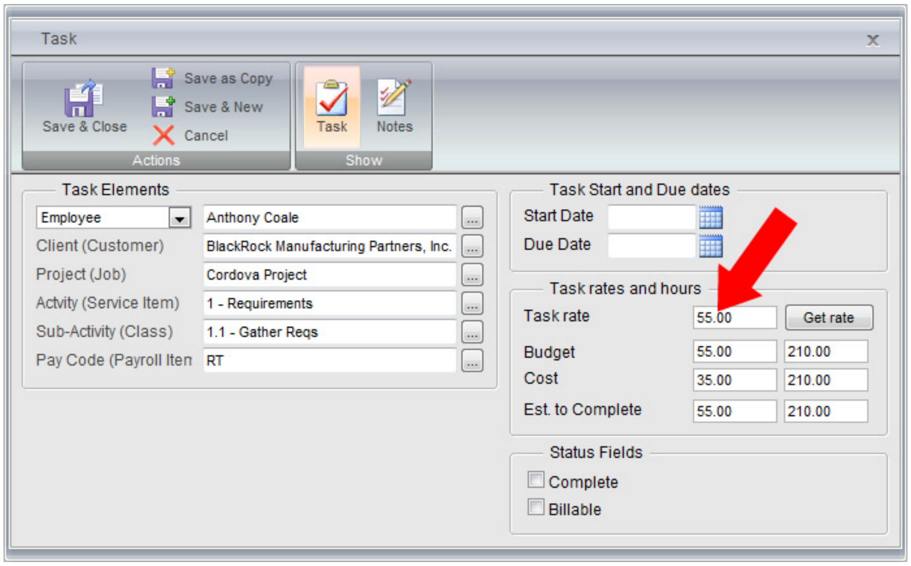


Fields available for selection in Summary Reports

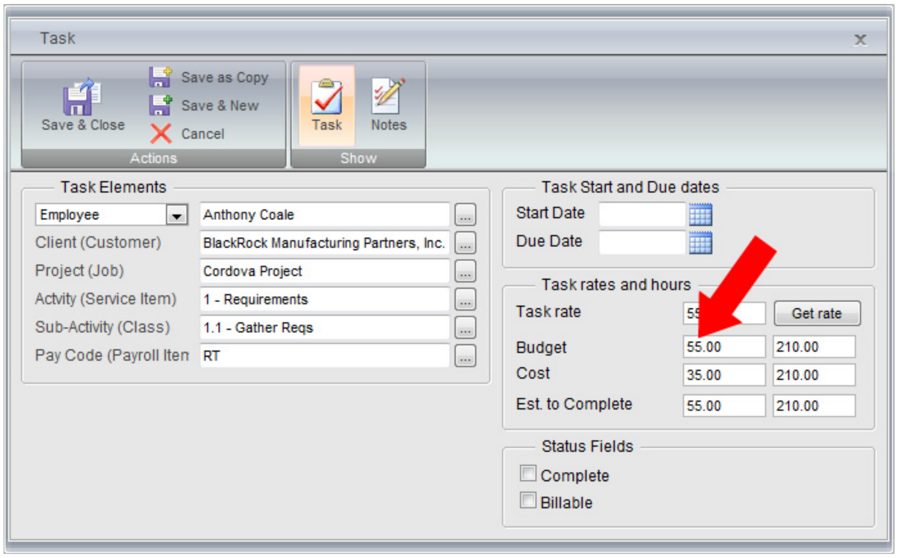
The following fields are available for selection in Office Timesheets Summary Reports…



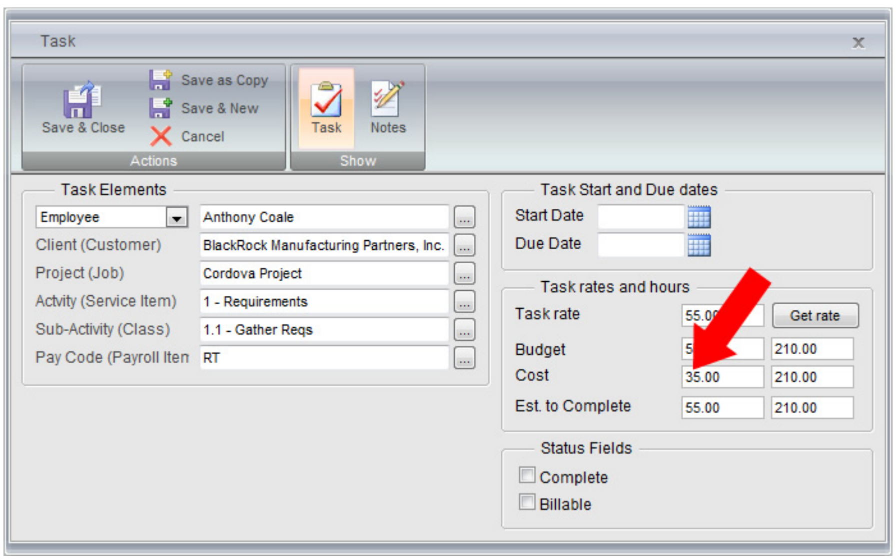
- Time Spent – is the total amount of time spent (Duration) for the selected (from View Criteria) row data.
- Task Rate – (Task Rate x Entry Duration).



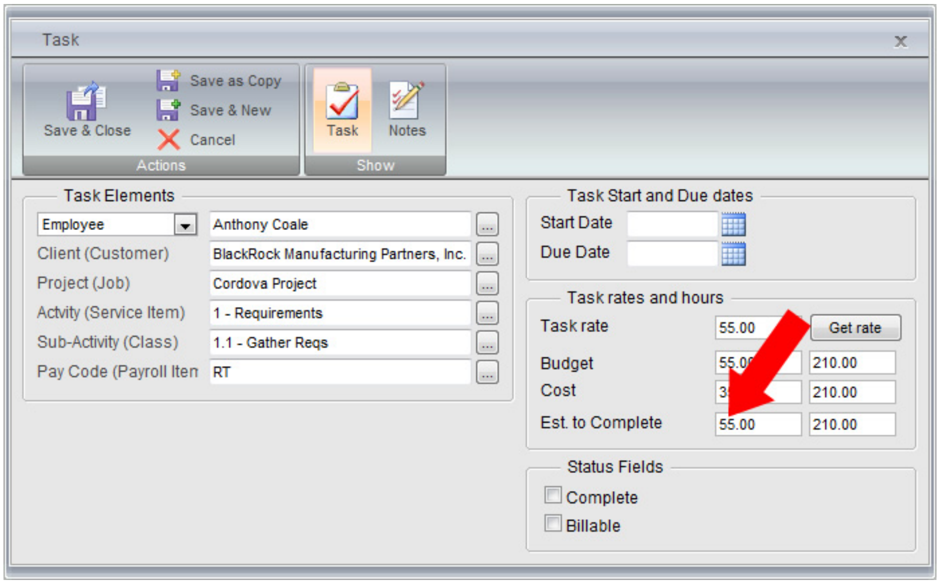
- Standard Amount: Tab A - (Standard Rate Tab A x Entry Duration).
- Overtime Amount: Tab A - (Overtime Rate Tab A x Entry Duration).
- Standard Amount: Tab B - (Standard Rate Tab B x Entry Duration).
- Overtime Amount: Tab B - (Overtime Rate Tab B x Entry Duration).
- Standard Amount: Tab C - (Standard 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).



- Cost rate - (Task Rate x Entry Duration).



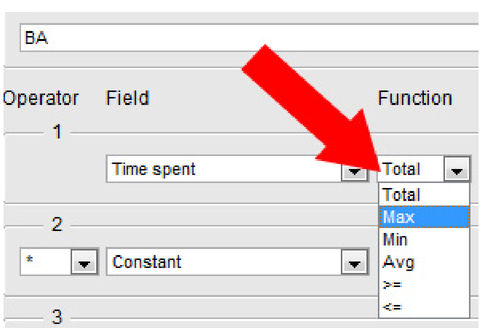
- Est. to complete rate - (Est. to complete Rate x Entry Duration).



- 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

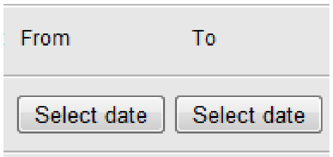
The following functions are available for selection in Office Timesheets Summary Reports…



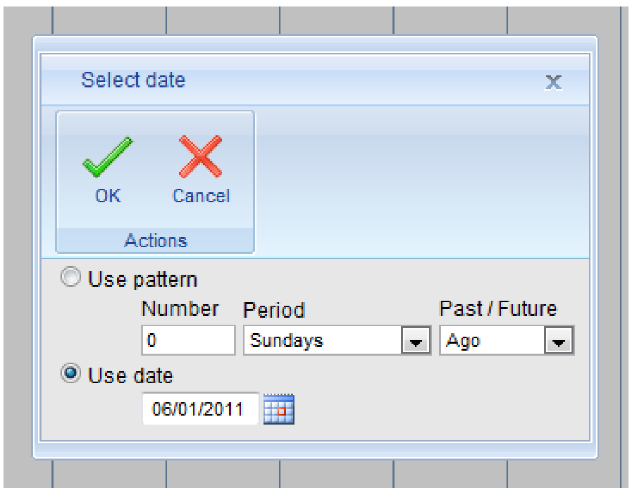
- **Total** – the total of all values for the selected field.
- **Max** – the maximum value of all values for selected field.
- **Min** – the minimum value of all values for selected field.
- **Avg** – the average value for the selected field.
- **>=** - total values that are greater than or equal to 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…

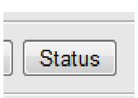


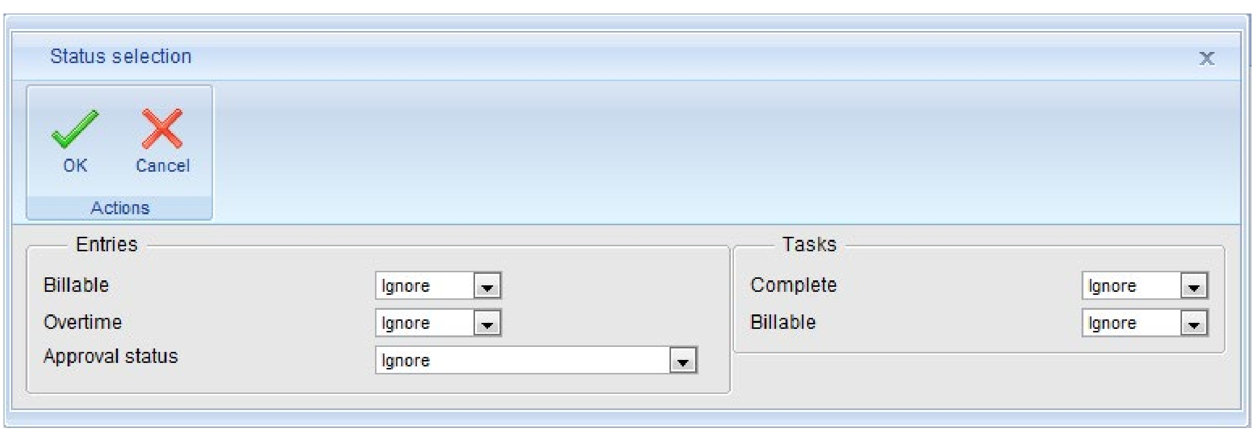
Select a date pattern or choose a specified date using the **Use pattern** or **Use date** radio button and date controls…



Status Filter Selection

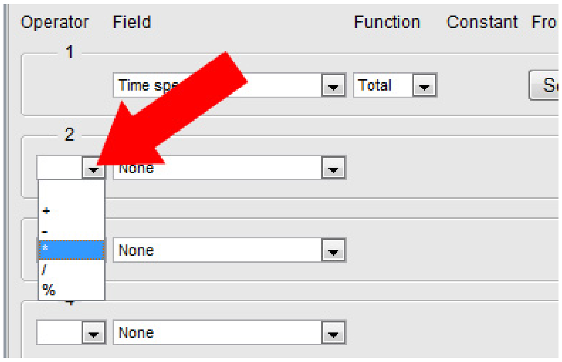
Click on the Status button to open the **Status selection** filter dialog box. The Entry and Task statuses you wish to filter your report column by, and click **OK.**





Operators available for selection in Summary Reports

The following operators are available for selection in Office Timesheets Summary Reports…

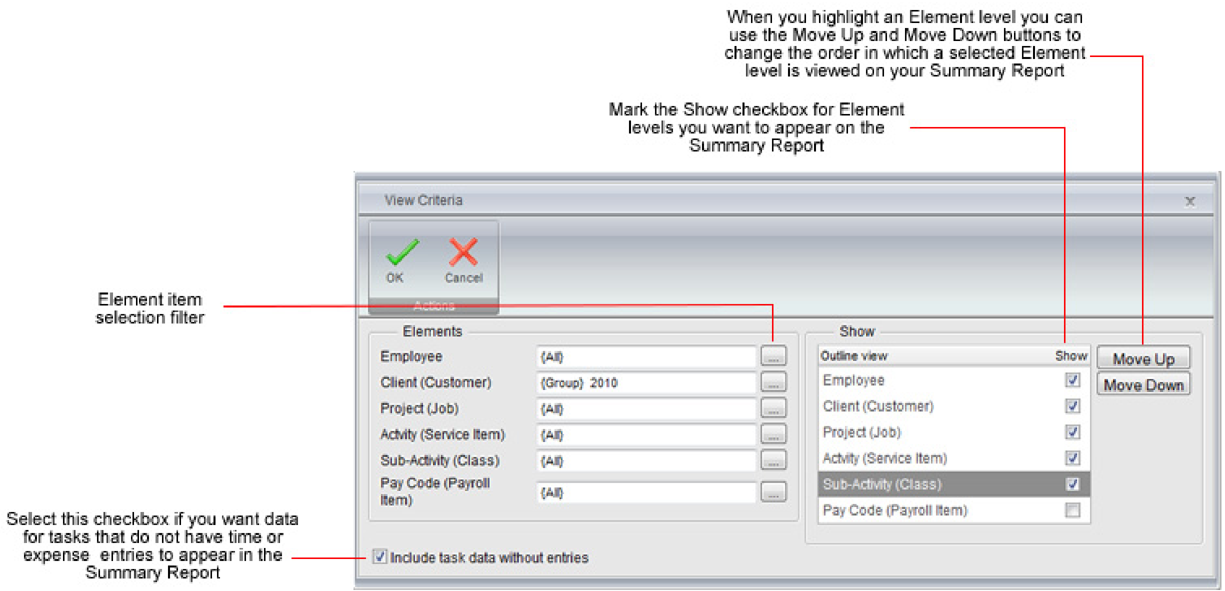


- **Add** – add the value of the current selected field to value of the previously selected field.
- **Subtract -** subtracts the value of the previously selected field from the value of the current selected field.
- **Multiply -** multiplies the value of the current selected field by value of the previously 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:



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.

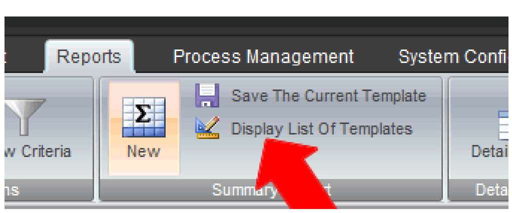
To save a Summary report:

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.**

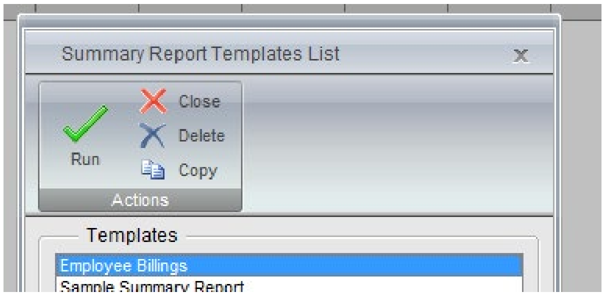
Opening a Summary Report Template

To open a Summary report template:

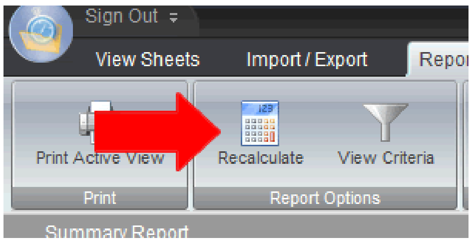
1. Click on the **Reports** tabs; and then click on the **Summary Reports** icon.
2. Click **Display List of Templates** in the **Summary Report** ribbon group.



3. From the **Summary Report Templates** List dialog box select the Report template you wish to open and click the Run icon.



4. 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.

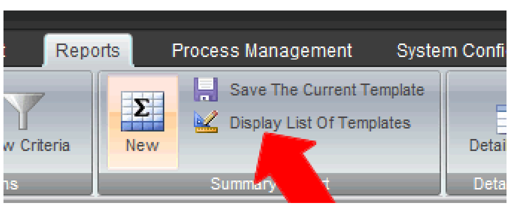


Copying a Summary Report Template to another user

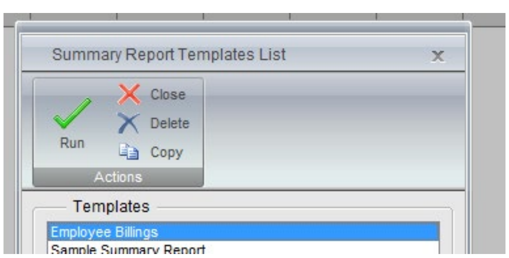
When you save a Summary Report the template is only saved to your list of templates. However, you can copy any Summary Report template that you create and save to any other Timesheet user.

To copy a Summary Report template to another user:

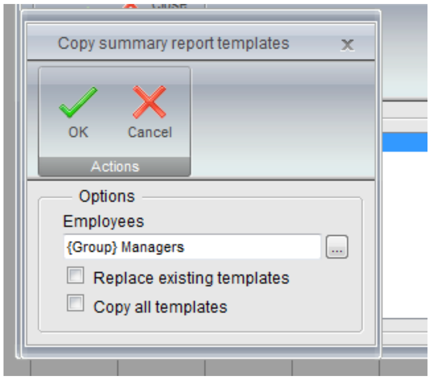
1. Click on the **Reports** tabs; and then click on the **Summary Reports** icon.
2. Click **Display List of Templates** in the **Summary Report** ribbon group.



3. From the **Summary Report Templates** List dialog box select the Report template you wish to copy and click **Copy**.

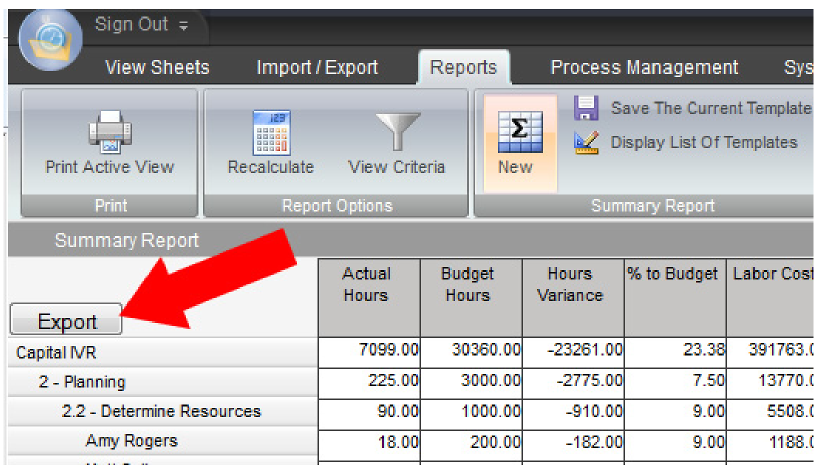


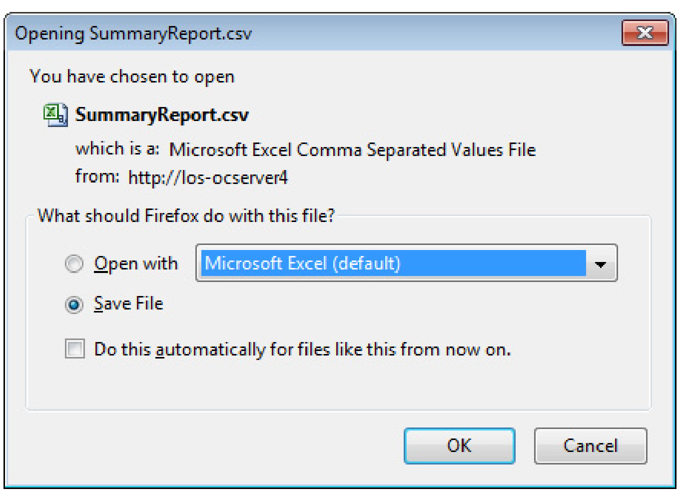
From the **Copy summary report templates** dialog box, select the Employee/s or Employee Groups you wish to copy the template to; and select **OK.**



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).

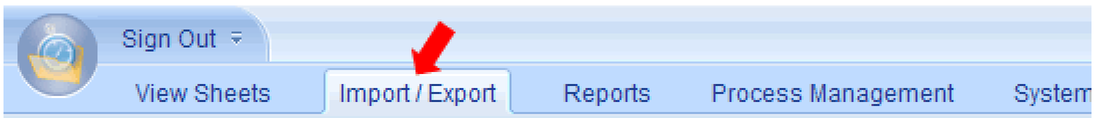




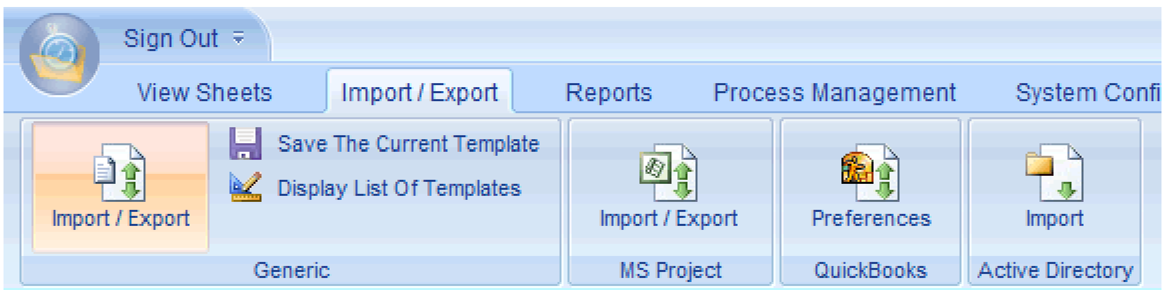
Using Generic Import/Export

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**.



- **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 bi-directional 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…

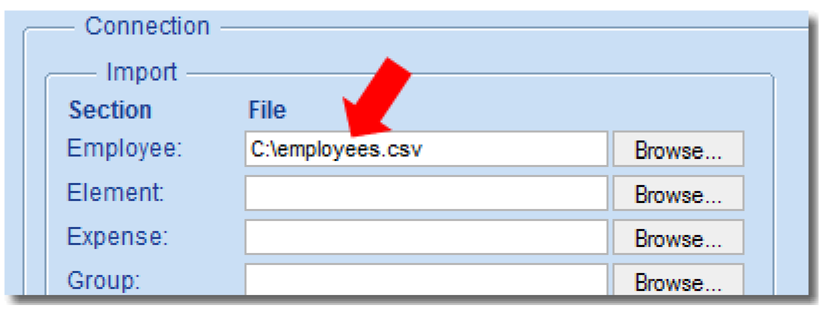
a. Choose the format in which your entries to be stored in the file you are exporting: **Minutes** or **Hours**. *This selection only applies if you are exporting time entries.*

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

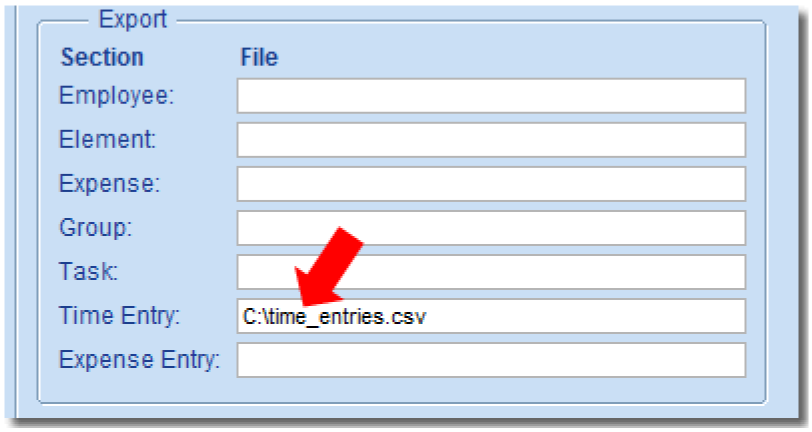
If importing…

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.



If exporting…

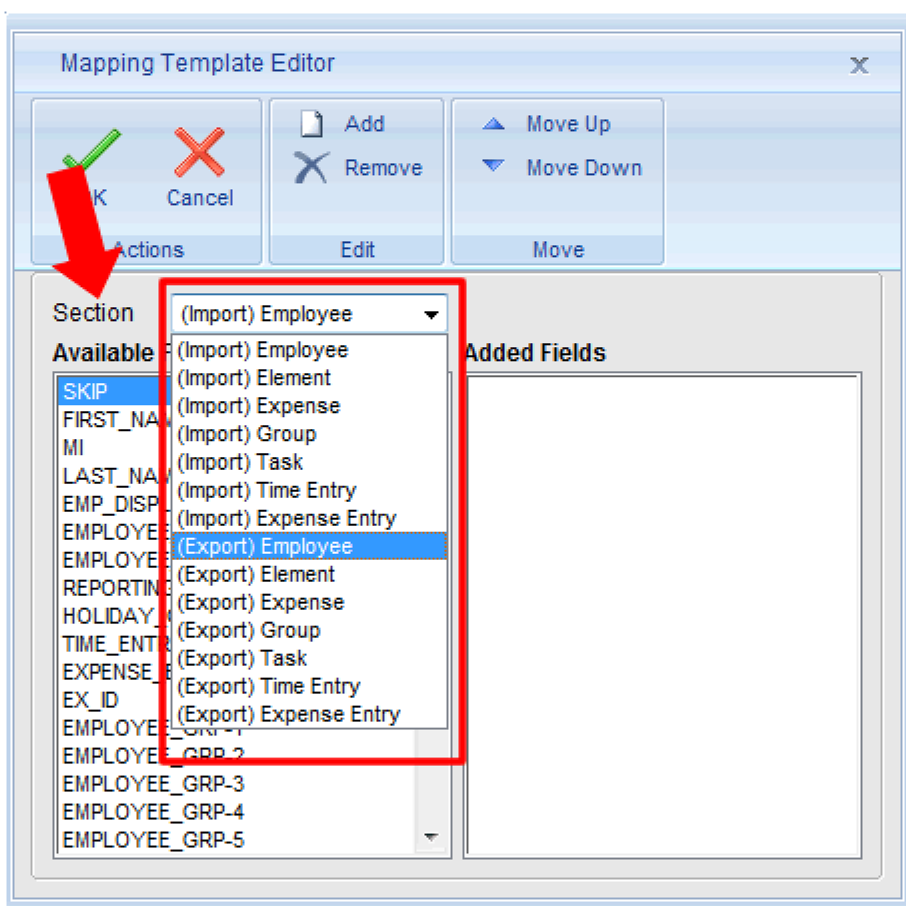
Enter the path and full name of the file (with .csv extension) you wish to export in the **File** field of the corresponding **Section**.



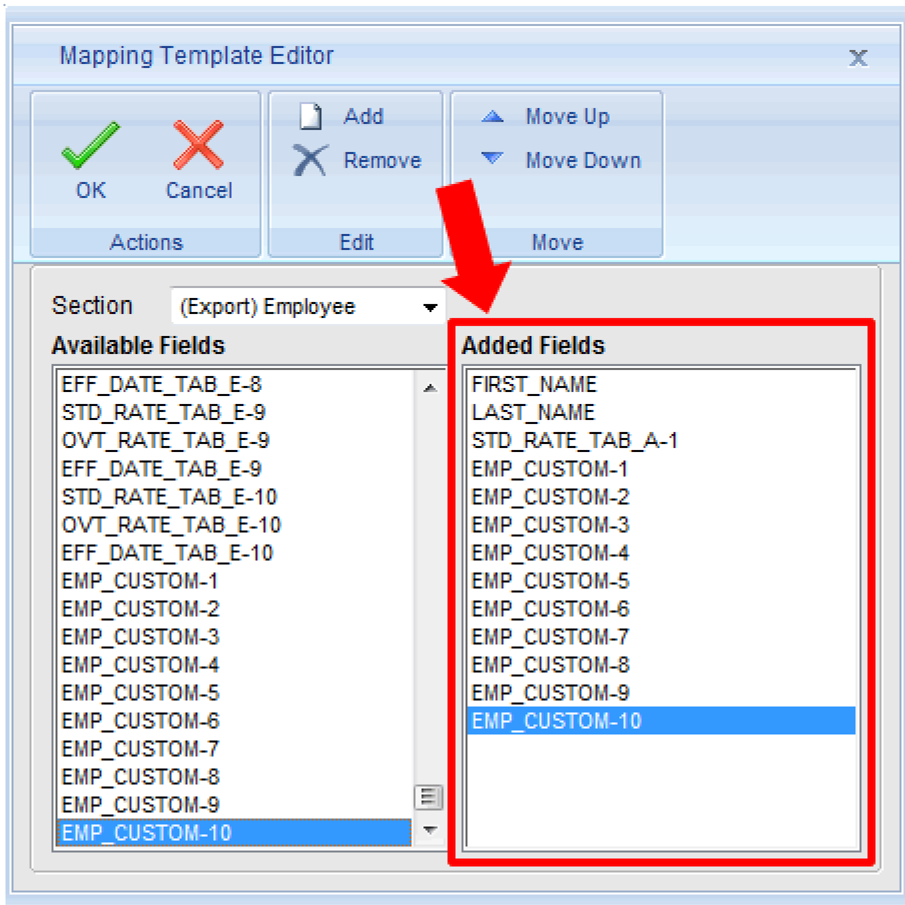
5. Click on the template button to open the **Mapping Template Editor** dialog box.

   **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…



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.

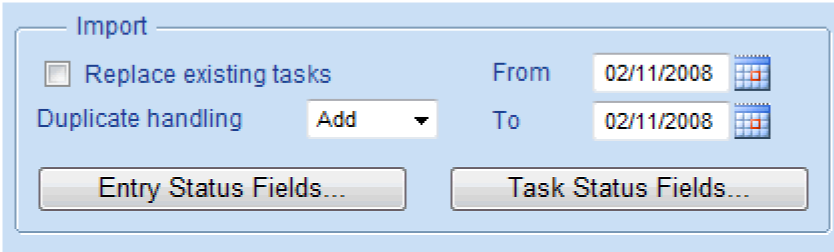


Use the **Move Up**/**Move Down** button in the **Move** ribbon group if you wish to change the order of fields in which you've added. This is done simply by selecting the field you wish to move up or move down and then clicking on the **Move Up** or **Move Down** button the number of times you wish to move the field up or down.

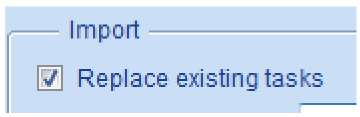
Use the **Remove** button in the **Edit** ribbon group to remove a field from the **Added Fields** column by highlighting the field you wish to remove, and selecting **Remove.**

6. Choose and/or select import/export options

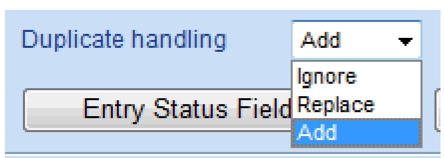
If importing data refer to the ***Import*** *form group…*



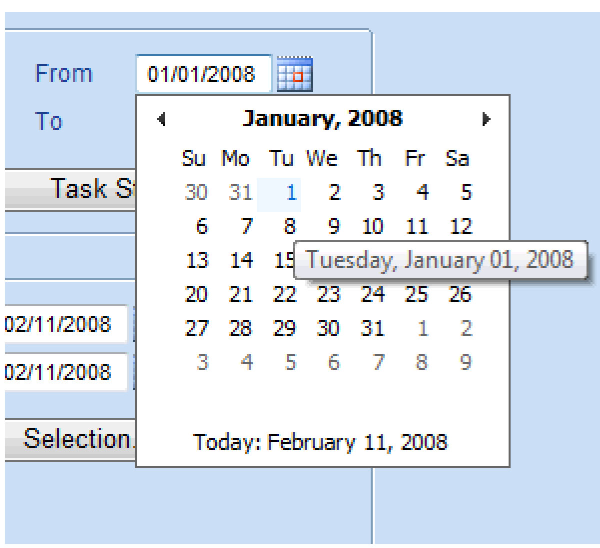
- **Replace existing tasks** – this option replaces an existing task within Office Timesheets when the same task is imported. For example, you import the same task, but with updated task information such as new task start and end dates, etc. In this case, the task in Office Timesheets will be replaced 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.



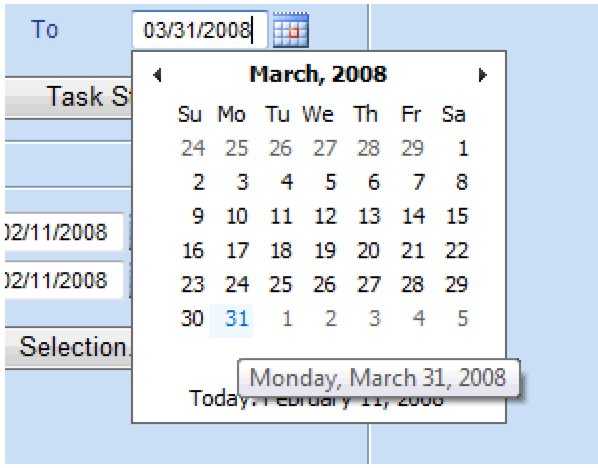
- **Duplicate Handling (Add, Ignore, Replace)** – if duplicates items are imported this selection tells Office Timesheets what to do with the duplicate item on import. If you select **Add**, Office Timesheets will add the record as a duplicate item. If **Ignore** is selected Office Timesheets will ignore 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.



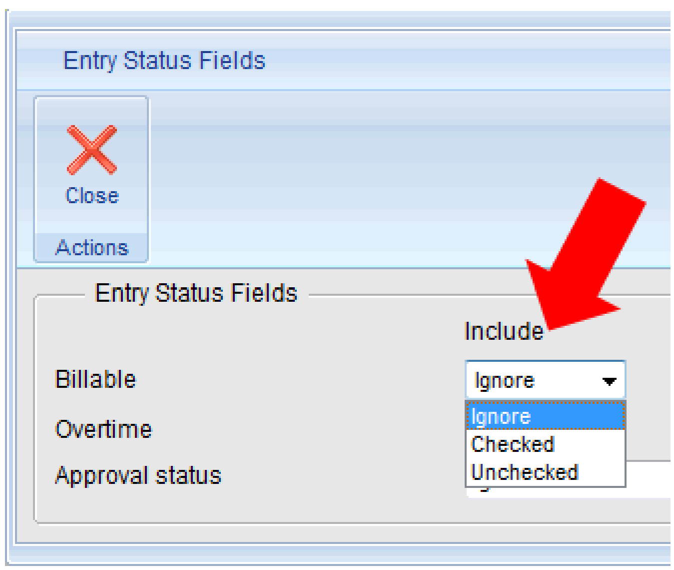
- **From** – if importing time and expense entries, you can select a **From** and **To** date in which to import entries.



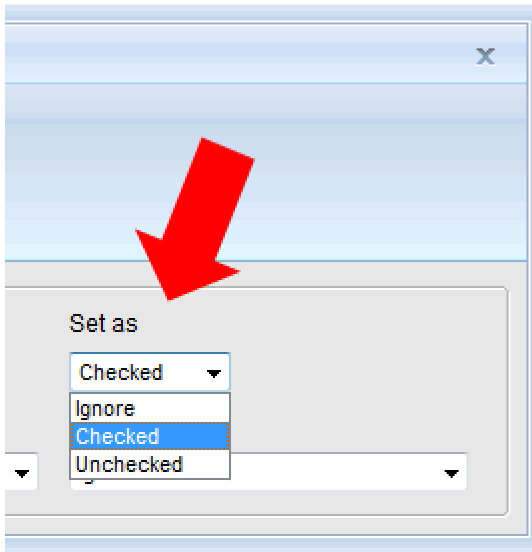
- **To -** if importing time and expense entries, you can select a **From** and **To** date in which to import entries.



- **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.
    - **Include –** will only import entries with included entry status selections.

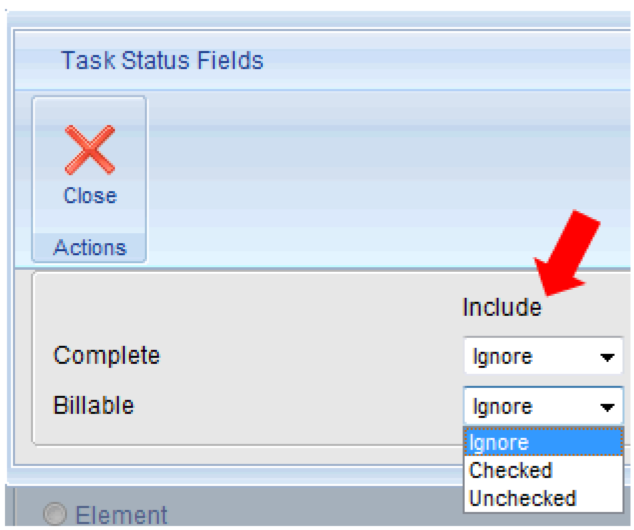


    - **Set As –** will set the entry status to the selected settings upon import.

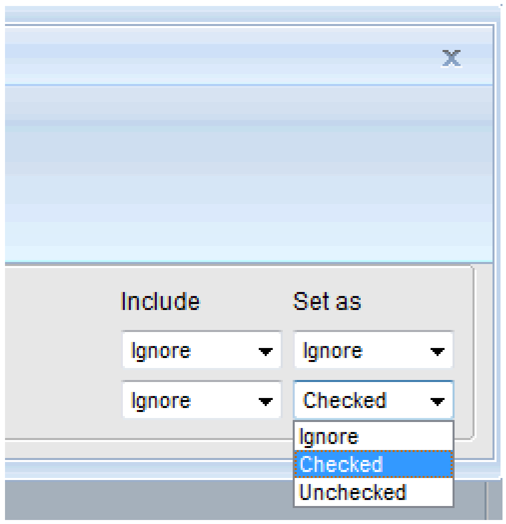


- **Task Status Fields -** this button opens the **Task Status Fields** selection dialog box. From this dialog you can choose to import tasks that contain your selected settings by using the **Include** column settings. You may also choose to set the status of tasks upon import by using the **Set as** column settings.

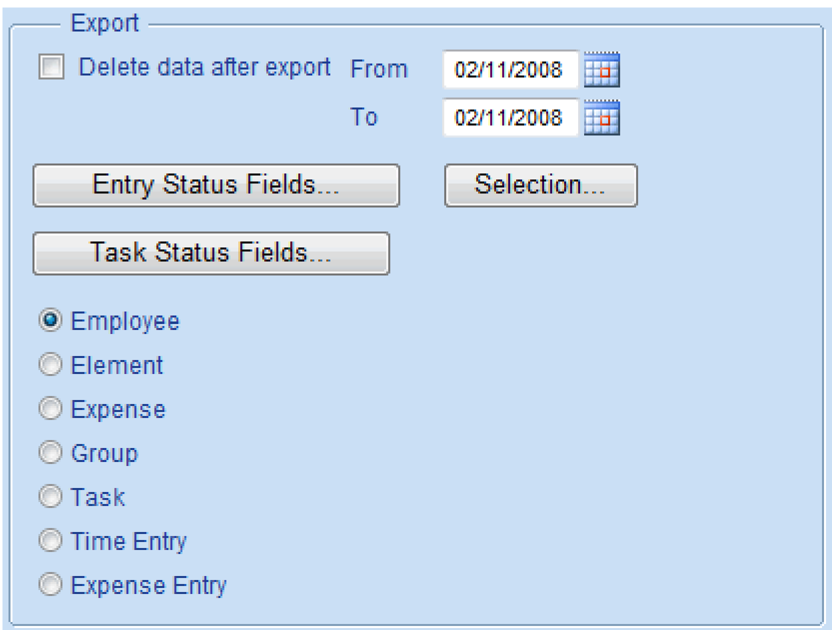
  - **Include -** will only import tasks with included task status selections.



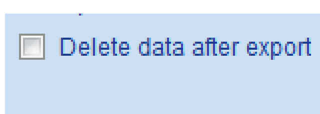
  - **Set As -** will set the task status to the selected settings upon import.



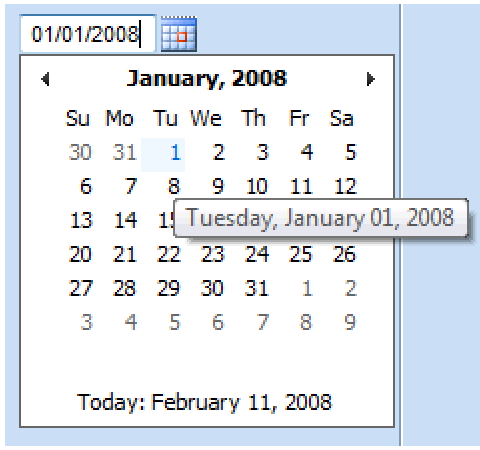
*If importing data refer to the **Export** form group (shown below)…*



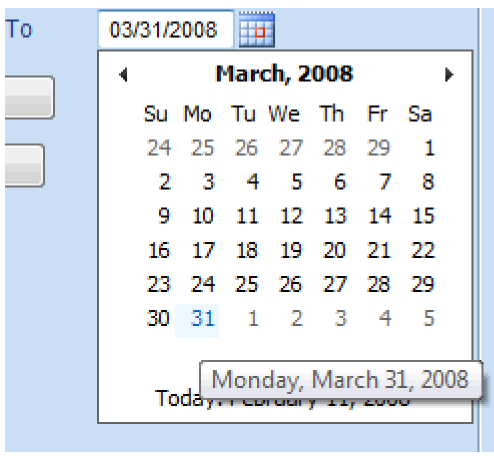
- **Delete data after export –** check this box if you wish to delete the selected data after export. **Use extreme caution with this selection setting as it deletes the selected data permanently from the Office Timesheets database.**



- **From -** if exporting time and expense entries, you can select a **From** and **To** date in which to export entries.

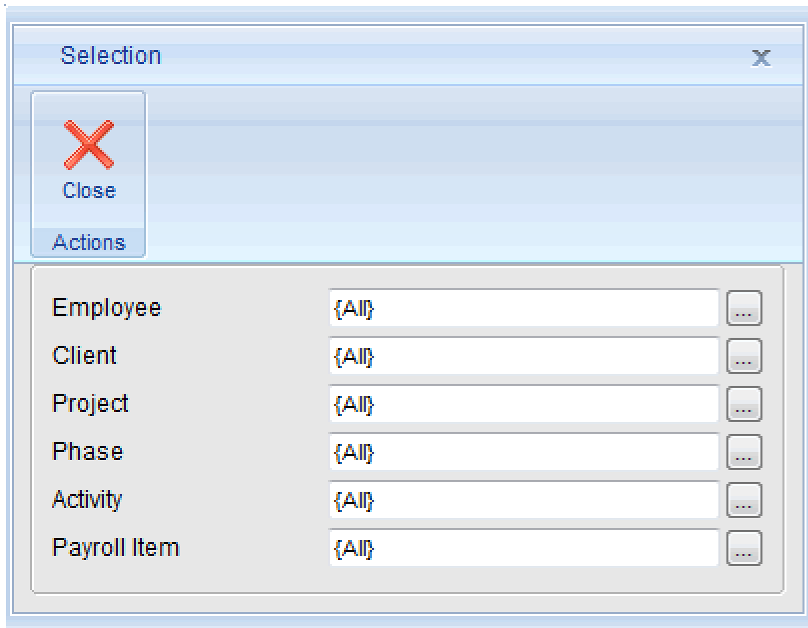


- **To -** if exporting time and expense entries, you can select a **From** and **To** date in which to export entries.

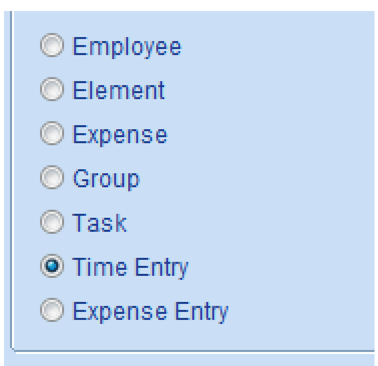


- **Entry Status Fields -** this button opens the **Entry Status Fields** selection dialog box. From this dialog you can choose to export time and/or expense entries that contain your selected settings by using the **Include** column settings. You may also choose to set the status of entries upon export 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.

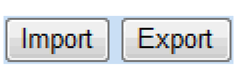
- **Selection (Level Selections)** – this button opens the **Selection** dialog box. From this dialog you can choose to export tasks that contain your selected level settings.



- **Category Selection (Employee, Element, Expense, Group, Task, Time Entry, Expense Entry)** – here you must choose the data category for which you are exporting.



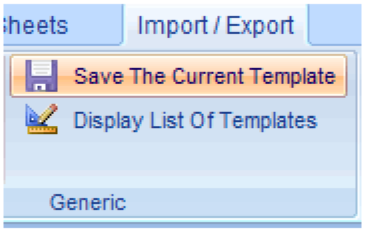
7. Click **Import** or **Export** to initiate the process of importing and/or exporting data using the template in which you've created.



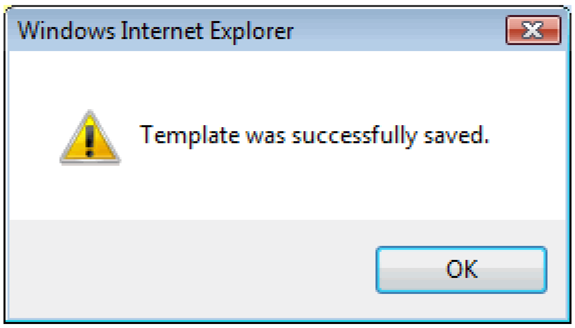
Saving import/export templates

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.



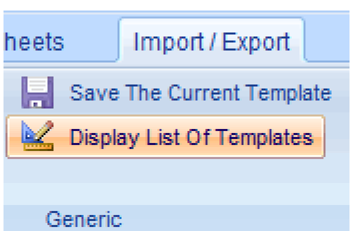
2. A message will appear that the template was successfully saved; click **OK**.



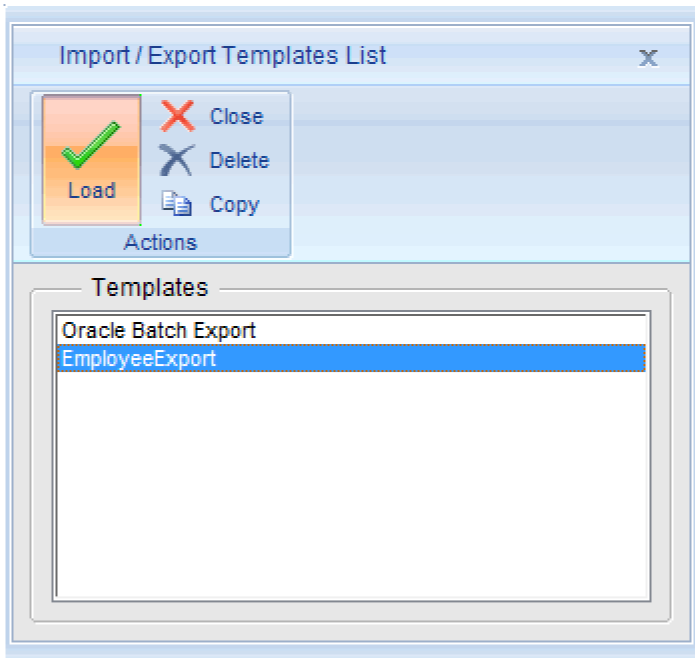
Retrieving import/export templates

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.

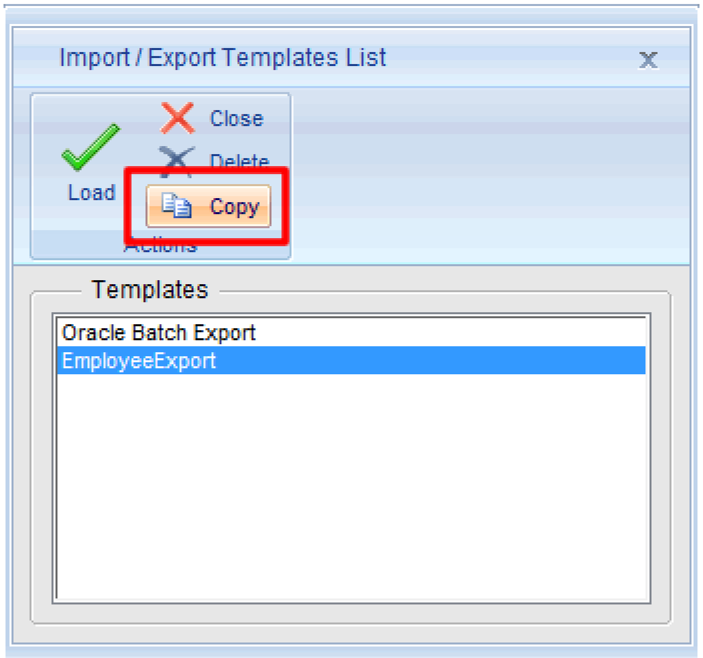


Copying import/export templates

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:

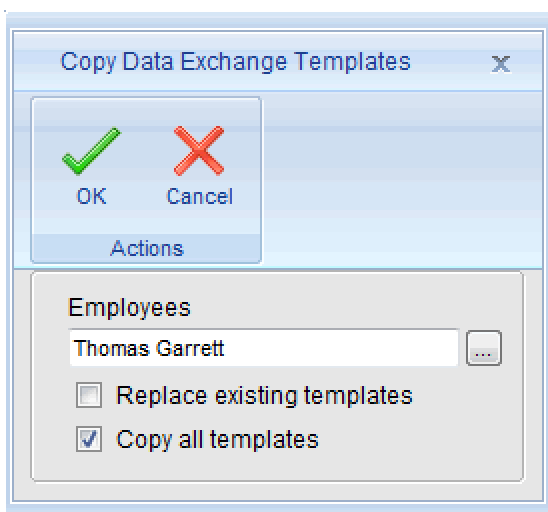
1. From the **Import/Export** tab, click on the **Display list of templates** icon in the **Generic** ribbon group.

2. From the **Import/Export templates** list dialog, select the template in which you wish to copy, and click the **Copy** icon.



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**.



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

SKIP	Skips the selected column

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	

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-10	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
Through	
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”.
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.

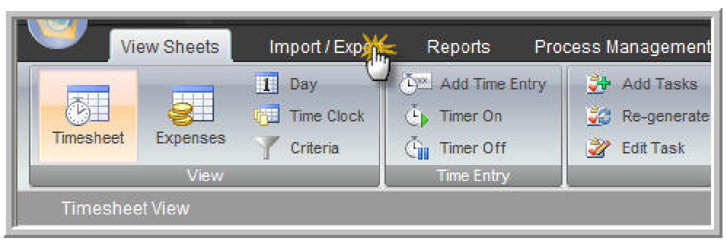
Note: points “h”-“j” only apply to Expense Entries.

Example: Exporting Employee Information

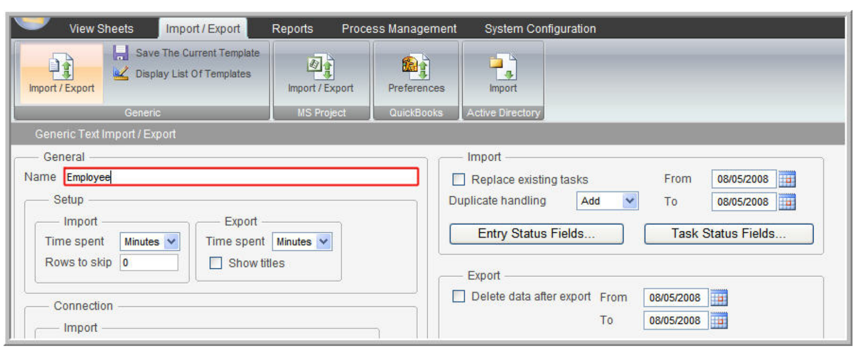
Please carefully read the instructions below as any deviation from these steps will result in an unsuccessful export.

To export data from Office Timesheets:

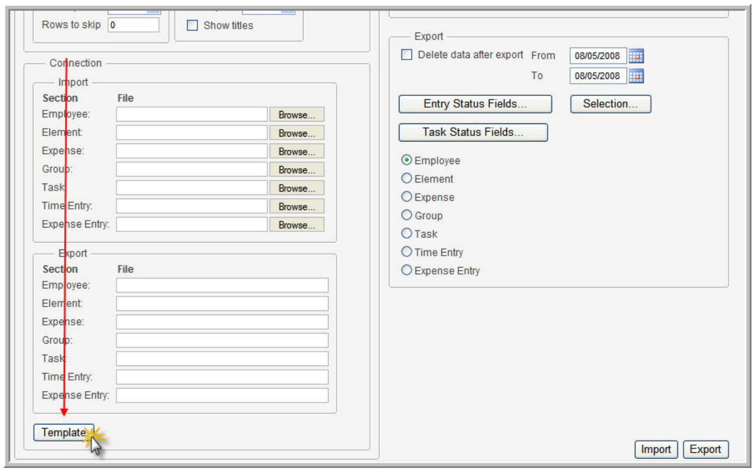
1. Click on the "Import/Export" tab.



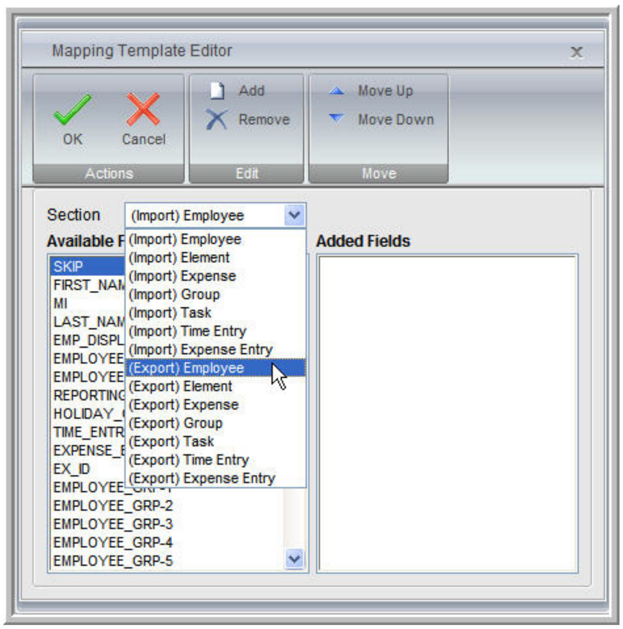
2. Enter in the name of the Element/Item(s) being exported into the "Name" field. For example if you were exporting Employee information enter in "Employee" in the "Name" field.



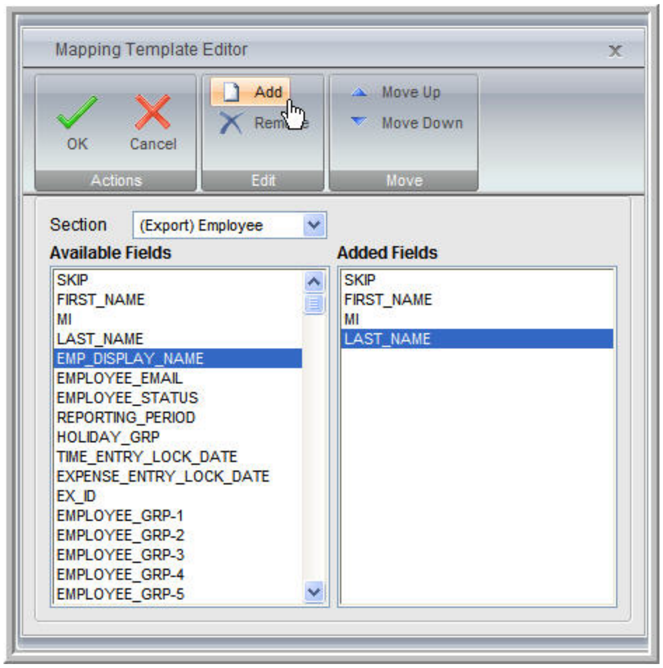
3. On the lower left hand corner of the page click on the "Template" button to open the "Mapping Template Editor".



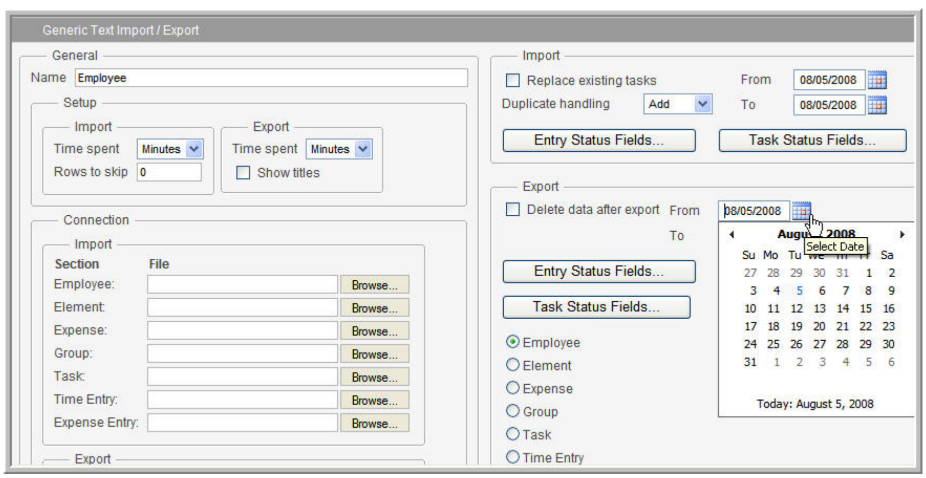
4. Choose the appropriate Element/Item you are exporting from the "Section" drop down menu. For example if you were exporting Employee information select "(Export) Employee".



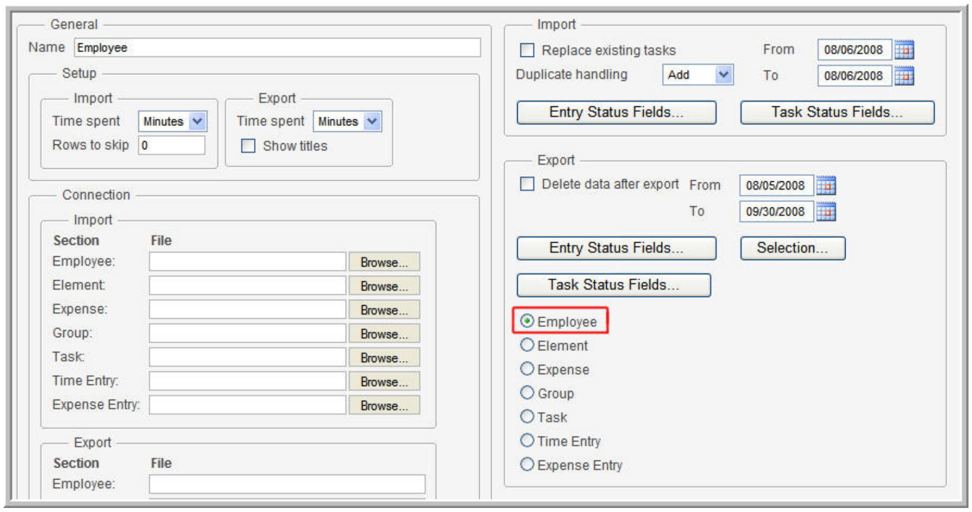
5. We strongly recommend selecting and adding (Add button) every "Available Fields" choice with the exception of any choices that begin with "EX" to ensure all valid information is not missed during the export. Choices that begin with "EX" is solely for importing purposes and will not be used for the export process. When you have completed your selection click on **OK**.



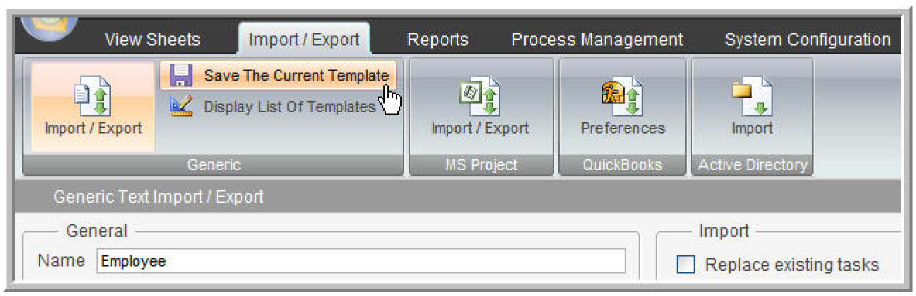
6. Under the "Export" (Right most field) field choose the appropriate dates. For example if a "Task" began 08/05/08 you will enter this date within the date field to ensure this task is exported properly.



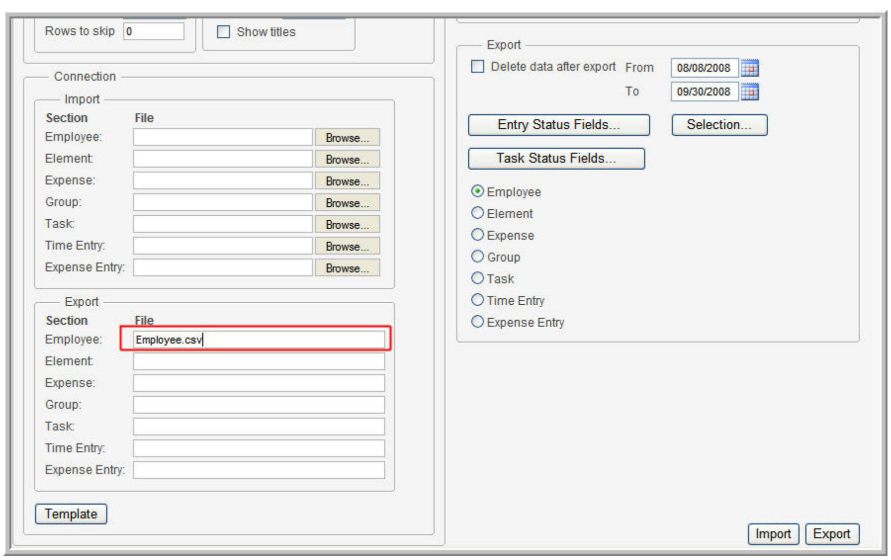
7. Under the "Export" field (Right most field) it is very important to choose the appropriate Element/Item you are exporting. For example if you are exporting Employee information select the "Employee" option below the "Task Status Fields..." button.



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.



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.



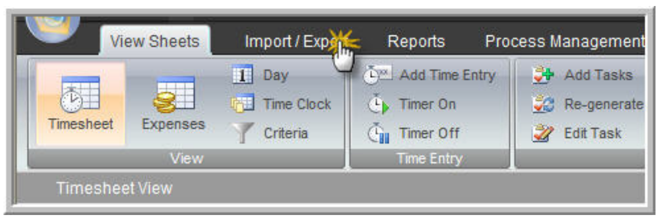
10. Select the "Export" button and save the file to your desktop.

11. Repeat step 1 until all desired Elements/Items have been exported and saved to your desktop.

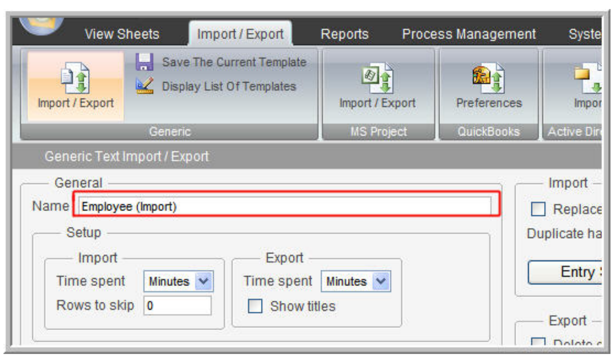
Example: Importing Employee Information

To import data into Office Timesheets:

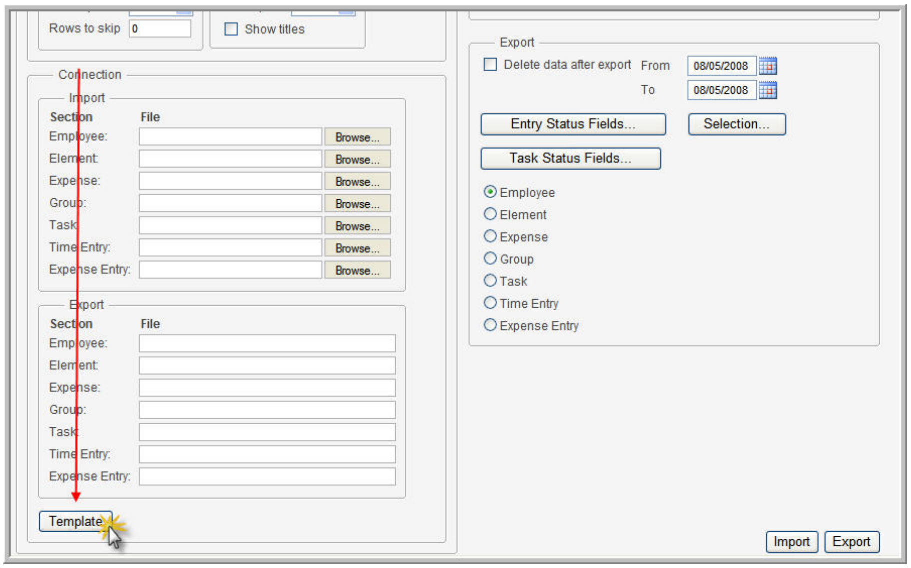
1. Click on the "Import/Export" tab.



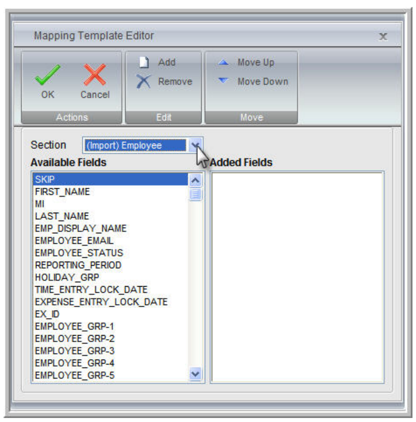
2. Enter in the name of the Element/Item(s) being imported into the "Name" field. For example if you were importing Employee information enter in "Employee (Import)" in the "Name" field.



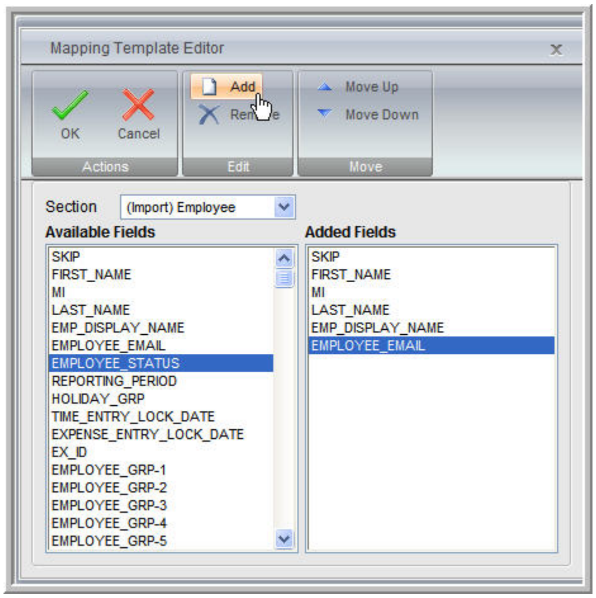
3. On the lower left hand corner of the page click on the "Template" button to open the "Mapping Template Editor".



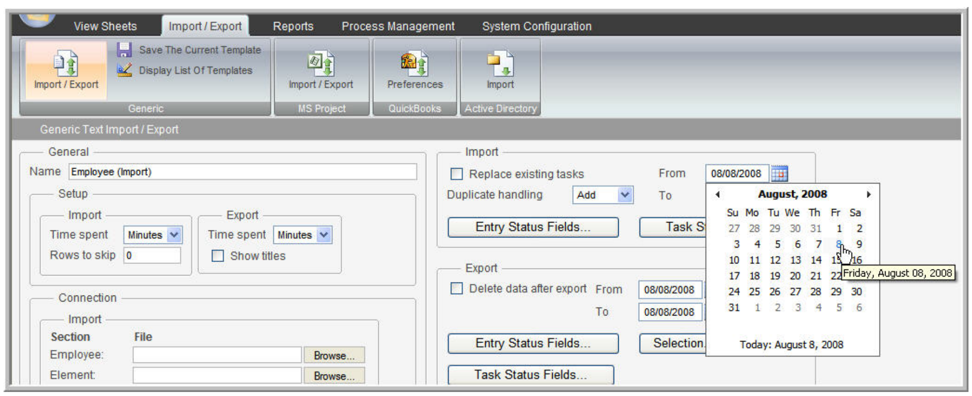
4. Choose the appropriate Element/Item you are importing from the "Section" drop down menu. For example if you were importing Employee information select "(Import) Employee".



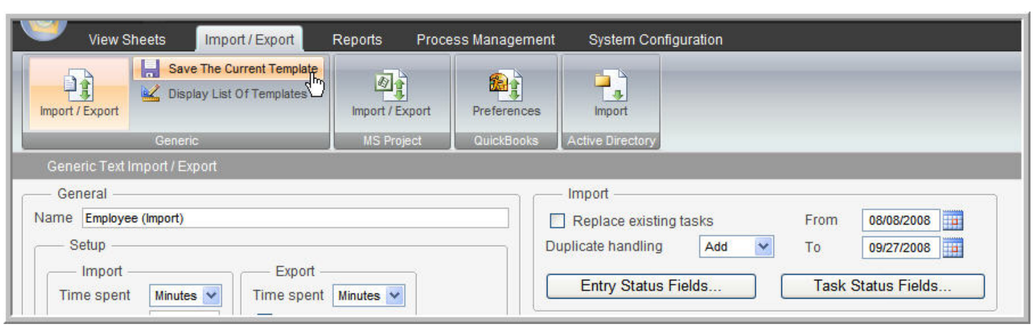
5. We strongly recommend selecting and adding (Add button) every "Available Fields" choice with the exception of any choices that begin with "EX" to ensure all valid information is not missed during the export. The only time a user would choose the options that begin with "EX" is importing data from another 3rd Party application. When you have completed your selection click on **OK**.



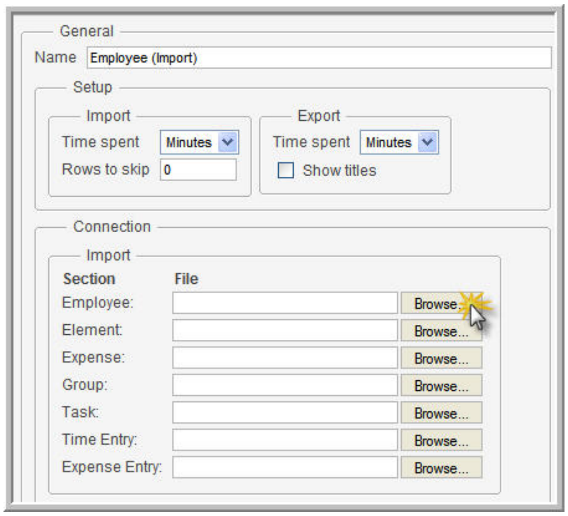
6. Under the "Import" field (Right most field) choose the appropriate dates. For example if a "Task" began 08/08/08 you will enter this date within the date field to ensure this task is imported properly.



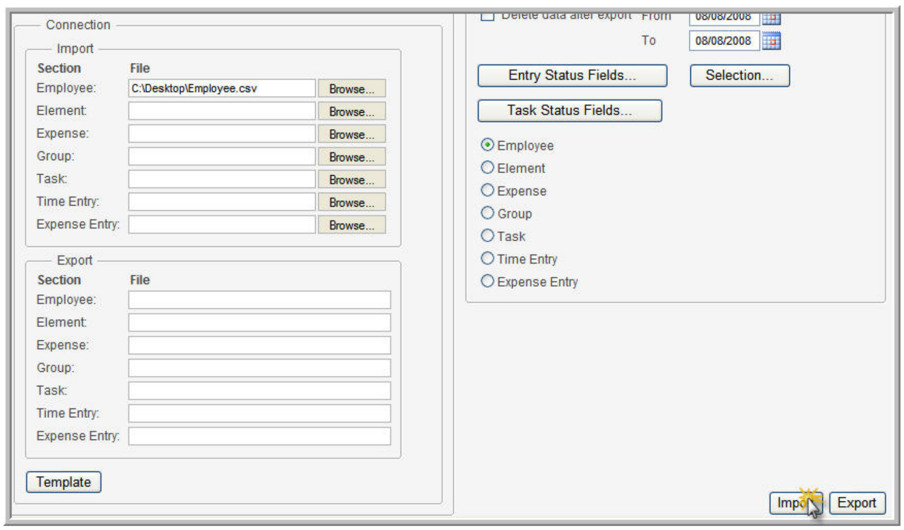
7. Select the "Save the Current Template" button in the "Generic" Ribbon Group in the top menu to save your current configuration for the particular Element/Item.



8. Under the "Import" field (Left most field) click "Browse" for the appropriate "Section" and select the .csv file you wish to import.



9. Select the "Import" button and the corresponding Section within Office Timesheets will populate with the imported information.



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:

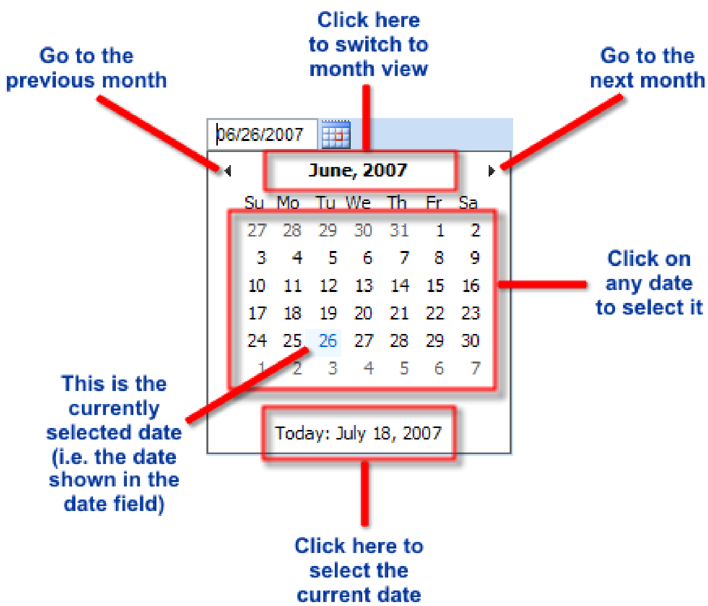
1. Click on the Date Picker button ( ). A pop-up calendar will appear on the screen.
2. Using the controls on the pop-up calendar, navigate to the required year and month.

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.

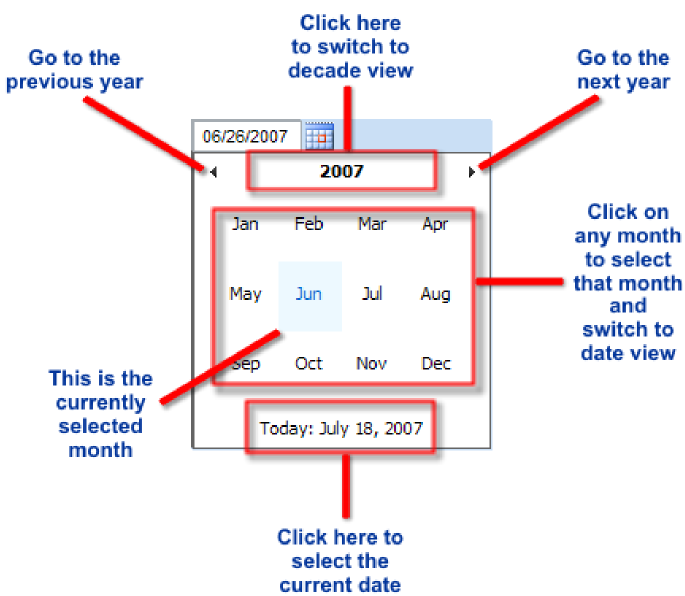
TIP: After clicking on the Date Picker button, if you decide not to select a date, just click anywhere outside the pop-up calendar.

The following figures illustrate how to use the Date Picker:

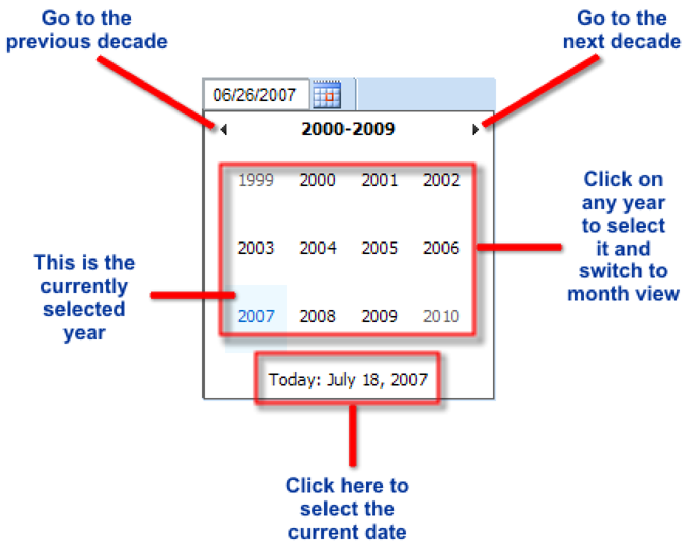
Date Picker: Date View



Date Picker: Month View

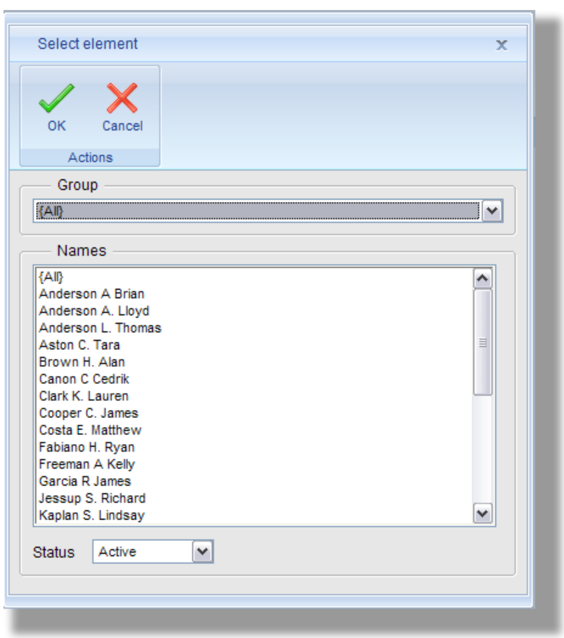


Date Picker: Decade View



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.



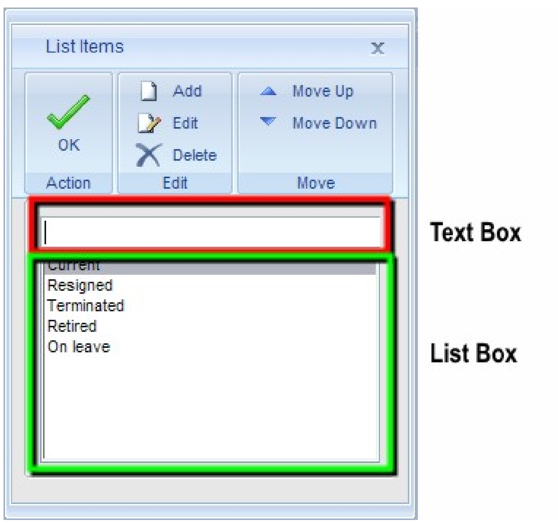
The following table describes the various items found in the Select element dialog box:

Item	How to use the Item	Default Value (if any)
Names	To refer to a particular item, **select the name** from this list. OR To refer to all the items in this list, select **{All}**. For example, while assigning Regional Options to employees, if you click on the button to select an employee's name, the **Select element** 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 **{All}**, 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 **{No selection}** in the **Select element** dialog box.	
Status	If there are too many names in the **Names** list, you can filter the entries by selecting from the **Status** drop-down list. Select **Active** to view only the active users, or select **All** to view all the users.	Active
Group	If there are too many names in the **Names** list, you can filter the entries by selecting a group or department from the **Group** drop-down list. For example, you could select **Public Relations** to view only those employees from the PR Department. **TIP:** In some instances, if you want to select the entire group, select the name of the group in the **Group** drop-down list and select **{Group}** in the **Names** panel.	{All}
Actions	The **Actions** panel at the top left corner of the **Select element** dialog box, contains buttons for either accepting or rejecting your changes.	
The OK button	Click the **OK** button to confirm or accept your selections and close the **Select element** dialog box.	
The Cancel button	Click the **Cancel** button to close the **Select element** dialog box without accepting your selections.	

Item	How to use the Item	Default Value (if any)
	Note: You can also click on the **Close** button at the top right corner of the **Select element** 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.

To...	Do this...
Add an item to the drop-down list	Type the value in the text box and click the **Add** 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 **Edit** 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 **Delete** button.
Change the order of the items in the list	Click on an item in the list box and click the **Move Up** or **Move Down** buttons to move the item.
Save your changes and close the List	Click **OK**.

To...	Do this...
Items dialog box	